

SEVEN LEVERS FOR YOUR INNOVATION SUCCESS

Annual Study by TREND ONE CHRISTIANE

PM MG

sheconomy enable2grow design offices

WELCOME TO THE **YEAR OF UNCERTAINTIES**

Dear readers,

Every year, we interview C-level innovation leaders from across the D-A-CH region to track the current innovation climate. We aim to create "Aha!" moments for you—by identifying seven levers that can help you become an innovation leader, even with or despite today's challenges.

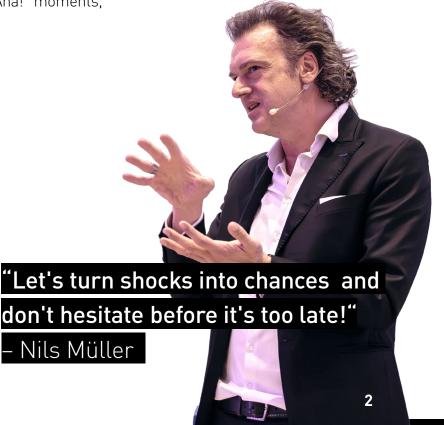
How to innovate and strategize in an out-of-control world

And we certainly haven't been short on challenges:

- Geopolitical instability, political upheaval, and economic recessions have created a tense interplay of systemic forces—fueling uncertainty about the future.
- In times like these, strong leadership becomes visible. So, what defines strong leadership today?
 - > Management must provide direction, keep the mission in focus, and convey a sense of stability through bold yet agile decision-making.
 - > Strategic decisions can no longer be final. Every choice must remain open to scrutiny—and even reversal. This is the only way companies can navigate their way through turbulent times with confidence.

After some background information, you will get to know the 7 levers —each one a practical compass for staying innovative and ready for the future in an unpredictable world. We wish you inspiring insights and plenty of "Aha!" moments,

Nils Müller, TRENDONE



BACKGROUND: FUTURE STARTS BEYOND TODAY'S BOUNDARIES

Let's zoom out towards the next economic super cycle: Where will this end? And will there be a good future for the economy, society, our work and the environment? Many people have great concerns and fears about the future due to geopolitical tensions and technological disruptions. Professor Henning Vöpel argues that "the future cannot unfold within the narrow constraints of the present".

However, many of us already realize that we are currently in a transitional phase to the next higher **economic** and **social order**. This phase is called "liminality" as the space between two states that only exists in order to get from A -> to -> B. Much like a train station or a hotel reception that only exist as a transition space.

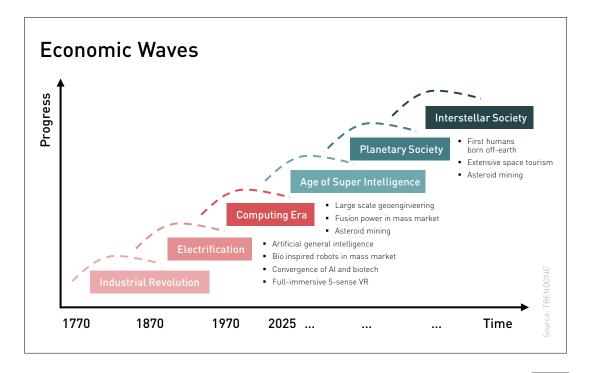
That's why we need to zoom out to see the bigger picture. We are familiar with this zoom-out to the major economic cycles thanks to the Soviet economist Nikolai Kondratiev, who published the theory of long waves back in 1925, which was taken up by Joseph Schumpeter in 1939 and expanded in

relation to basic technical innovations.

This zoom-out shows us that we are in the transition from the computer age to the age of **superintelligence**. This is about the end of the knowledge economy on the one hand, but also about geopolitical power shifts between the USA, China and the EU on the other.

If you recognize this bigger picture, you can also see and **seize the opportunities**. We want to make these opportunities available to readers in the Innovation Leaders Study in seven levers and look forward to the discussions.

"The omnipresent disruption arises because the future cannot unfold within the narrow constraints of the present, meeting resistance and contradictions. It is only in a higher dimension that there is room for progress" – Prof. Dr. Henning Vöpel



TREND ONE

BACKGROUND: WHAT IS IN IT FOR GERMANY?

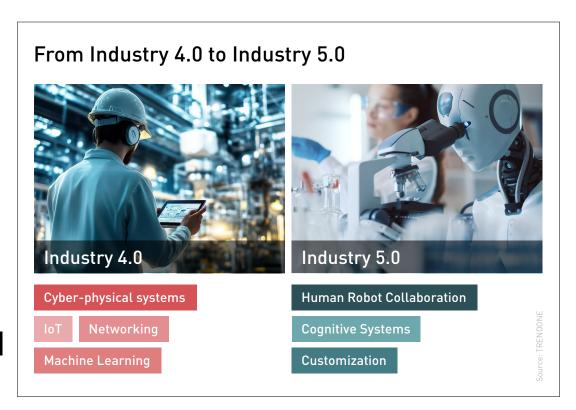
Geopolitical tectonic plates, Russia's war against Ukraine, tensions between China and the US, technological disruptions, and advancing protectionism are a wake-up call for Germany to adapt to a new and rapidly changing world.

To regain economic momentum, German companies must also **embrace growth potential within Europe**. Here are some key strategies to reposition Europe—and with it, Germany—as a stronghold for innovation and investment:

- Stronger collaboration between the United Kingdom and the EU.
- Massive defense and dual-use investments in software and technology that can be used for both civilian and military purposes.
- The InvestAI initiative is set to inject billions into European AI gigafactories laying the groundwork for technological sovereignty.
- Attract talent from the US that is affected by the sanctions implemented by the US government against universities and research institutes in the USA.
- Position Europe as a progressive, open,

- and diverse talent hub. With diversity measures being rolled back in the US, European companies must take a bold stance.
- Shape innovation ecosystems on strong future value propositions such as cyberphysical industries, deep tech, and industry 5.0.

Now is the time for courage, strategic foresight, and renewed European self-confidence.



TREND GNE

INNOVATION LEAD BY #1 GERMAN MUT a.k.a. Sondervermögen for you

Struggling German armed forces and a crumbling infrastructure: the German government has approved a multi-billion-euro financial package for defense and infrastructure. The level and broad diversification of investments have a direct and indirect impact on all sectors and areas, **also for you**:

In the short term, investments will be channeled into the areas of **infrastructure**, **social affairs**, **climate protection**, and **civil protection** and thus ensure economic growth. In the medium term, the German Economic Institute (IW) forecasts that if Germany spends the investment over the next 4 years, GDP in 2026 could be **5.4% higher** than without the special fund.

Spillover effects in the private sector serve as indirect growth drivers: investments in key areas accelerate knowledge transfer, reshape business models, and spur innovation. This will strongly impact German cutting-edge fields like Industrial X, Deep Tech, Cyber-Physical Systems, quantum

technologies, and industrial AI. New ecosystems between defense, industry, and startups are also likely to emerge.

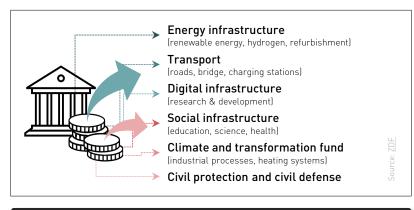
LEVER #1

- The investments have an impact on all sectors and industries. Companies must see them as a springboard to the future. Instead of waiting, the courage and confidence to act are needed now.
- Spillover effects and dual-use goods technologies that can be applied for both civilian and military purposes—act as a key driver for innovation in different industries
- Deep-rooted German beliefs regarding the military must be revised.

MORE ABOUT FUTURE-PROOF PORTFOLIO >



"Our weakness isn't expertise—it's a lack of courage. In Europe, we rarely launch imperfect innovations, while others test, learn, and scale. The future happens in the market, not the lab. Those who wait for perfection never lead" - Sonja Pierer, Intel



EXAMPLES

New Ecosystems

The defense industry is on the verge of a transformation in which new collaborations, such as that between VW and Rheinmetall, are becoming possible.

Source: <u>IW Makroökonomische Auswirkungen der Zeitenwende 2.0</u> Handelsblatt

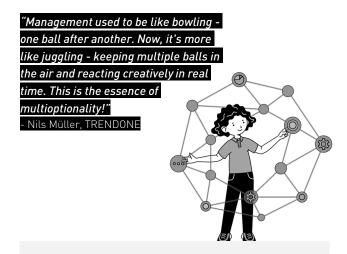
INNOVATION LEAD BY #2 MULTIOPTIONALITY

The stress level for CEOs has reached a new height where simultaneous analysis, planning, implementation, and transformation have become the norm. Rapid technological, geopolitical, and social changes are overwhelming traditional corporate strategy systems, necessitating a redesign of decision-making processes to keep companies relevant and capable of generating value.

Success Formula: Anticipation and orientation should be integrated into a collaborative decision-making process, aiming to develop multiple relevant options (multioptionality). The ability to simultaneously exploit existing assets and explore new avenues is becoming a core competence.

Ambidexterity = Exploitation + Exploration via Networked Ecosystems

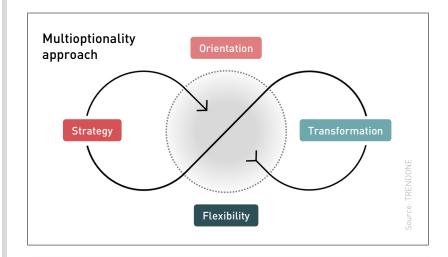
Multioptionality = Collaborative Foresight of Options



LEVER #2

 Multioptionality means having many action and growth options preconceived, maintained, and then utilized at the right moment. Building value-creating ecosystems through partnerships is key to success in multioptionality.

MORE ABOUT SCENARIOS >



EXAMPLES

Product Extension

Zoom has expanded from offering just video conferencing to creating an ecosystem with digital whiteboards and meeting recorders, enhancing flexibility and new uses for customers.

Further Reading: Harvard Business Review HBR Radical Optionality; Nassim Nicholas Taleb Antifragility

INNOVATION LEAD BY #3 NONLINEAR ECONOMY

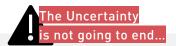
Uncertainty is the new foundation of the global economy and not just a short-term disruption. We are entering a new normal where outcomes can no longer be predicted linearly from inputs.

Unpredictability: The distribution and production of ideas, software and digital platforms is no longer predictable due to systemic networking. This is changing how products are developed, marketed and utilized. Companies must react flexibly to changes, quickly recognize patterns and actively deal with uncertainties. Being able to recognize the right time is becoming a key competence. This creates new paradigms for companies in terms of internal processes, organization and skills.

Quote from Prof. Rene Rohrbeck, EDHEC France:
"Companies prepared for the future outperform the average by a 200% higher growth and a 33% higher profit."



'What do the top innovators do differently from others? Actually, it's quite simple: They know the right topic, the right timing and the right way to implement their plans. This is the secret formula of growth." - Hendrik Freund, TRENDONE



LEVER #3

- Companies should accept the unpredictability of developments and integrated smart timing in their strategy processes. Smart timing is a method of taking strategic action not too early or too late, but at the right time.
- This depends largely on the market situation, customer trends, the company's own capabilities and the activities of competitors.

MORE ABOUT SCENARIOS >

The Nonlinear Economy > Production is nonlinear Progress and unpredictable Funnel of possible > Value is **sudden** (and compoundina) > Profits are scalable > Labor & inputs are specialized > Specialized individuals matched to unique tasks > Winner-take-most distribution of rewards Future > Failure is frequent Variety of options emerging **EXAMPLES Smart Timing** Nvidia has chosen the right time to evolve from a graphics processor manufacturer for gaming to a versatile platform provider, closely integrating hardware and software with an ecosystem approach and actively anticipating new markets. economic Uncertainty, Dror Poleg: Non-Linear Economy

INNOVATION LEAD BY #4 AI MASTERPLAN

While AI holds enormous potential in data-intensive environments, only around 7% of German industrial enterprises are expected to have an AI strategy by 2025, according to the VDMA—a stark indicator of an innovation lag.

Al should not be viewed as a peripheral or small-scale efficiency tool, yet it is evolving toward Agentic AI, capable of independently executing functions, making decisions, and learning on its own.

Integrating such agents into corporate structures can be a game-changer for tackling pressing challenges:

Al agents can automate tasks related to the skilled labor shortage, regulatory compliance, and proactive cybersecurity threat detection — unlocking significant efficiency gains.



"Imagine a world where AI agents are not just tools but autonomous partners—anticipating needs, making strategic decisions, and shaping the future alongside us. The key question is no longer if we will live in such a world, but how we will shape it" - Torsten Rehder, TRENDONE

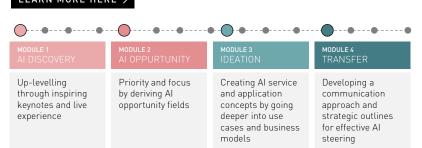
LEVER #4

 Innovation leaders adopt emerging technologies like AI agents at the right time. The CEO is the driving force behind understanding new technologies in the context of the business model and pushing them into the company.

MORE ABOUT AI CAMPUS >

Building an AI masterplan: Management must build a clear understanding of AI's impact on the company and define the right steps for transformation. This begins with an overview of current AI trends, identifying relevant applications, developing specific use cases, and shaping a coherent AI strategy.

LEARN MORE HERE >



EXAMPLES

Holistic Al Plan



LUQOM, an e-commerce specialist for lighting, uses AI to shorten the product development of new lamps from several months to just 3 weeks. At the same time, turnover has increased by 8%.

Source: <u>Luqom</u>

INNOVATION LEAD BY #5 INNOVATION SHIFT

Intense competitive pressure, narrow margins, and sluggish growth make it difficult for companies to build solid equity reserves. According to ZEW, innovation metrics are projected to stagnate in 2025—only 26.8% of companies plan to have dedicated innovation budgets, while large corporations and industrial firms are increasing their investments. Meanwhile, SMEs and service providers are taking a more cautious approach.

Without budgets and human resources, innovation is simply not possible.

The call for an "Innovation Shift" requires a structural paradigm change:

Organizations must strategically reallocate resources and intentionally create room for creative and transformative projects.



"Innovation is like oxygen: a company cannot breathe without it. Those who protect cash flow from ideas today will suffocate from stagnation tomorrow"

- Andreas Rüter, Alix Partners



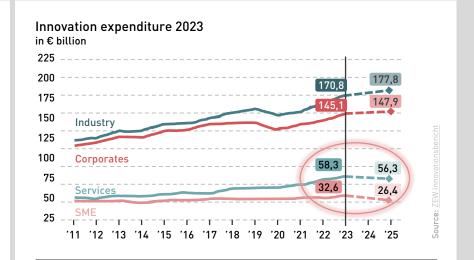
"Companies must create spaces where intrinsically motivated people with diverse backgrounds can shape the future together. Leaders should act as facilitators—the ideas are often there already; they just need to be activated"

- Eva Degener. Ada

LEVER #5

- To stay ahead in the long run, companies must pump resources into innovation.
 Shifting budgets toward R&D, automation, and forward-looking projects helps break old-school constraints.
- By empowering cross-functional teams and tapping into outside partnerships, companies create a constant flow of fresh insights and breakthrough ideas.

MORE ABOUT INNOVATION STRATEGY >



Possible Innovation Shift Hacks:

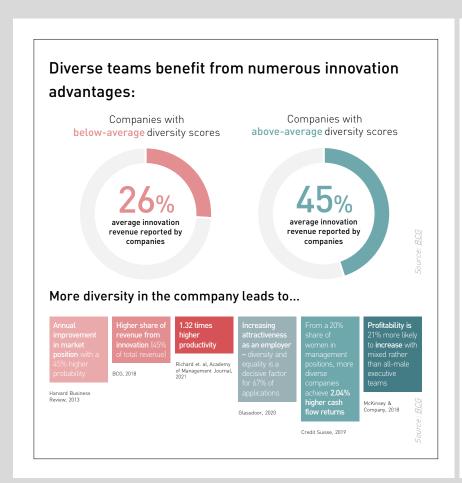
#Exonation: Continuously analyze which structures and processes can be optimized or shortened to free up resources for innovation.

#AlAgents: Automate routine tasks to unleash human potential for creative, high-impact initiatives.

#InnovationLeave: Temporarily reassign roles during parental leave or sabbaticals—showing that positions can be covered without compromising efficiency.

#0penInnovation/Cooperation: Collaborate with startups, universities, and innovation platforms to access additional know-how and ease internal resource constraints.

INNOVATION LEAD BY #6 FEMALE FORCE



The representation of women in leadership has reached a five-year low (24.1%). However, companies with greater gender diversity in top positions consistently outperform their competitors.

Female leaders often excel in critical leadership skills such as communication, empathy, and collaboration – making them powerful agents of change.



EXAMPLES

"Positioning starts from within. For women in leadership, it's not just about being visible it's about being strategically impactful."

- Christiane Wolff

LEVER #6

■ Female Force increases the visibility of executives — particularly women — through strategic communication, targeted employer branding, and corporate influencers. By leveraging women's networks as platforms for exchange and support, women are encouraged to fully realize their potential.

MORE ABOUT FUTURE DAYS >

Female Force Siemens has developed a comprehensive strategy for female leadership advancement

strategy for female leadership advancement through role-specific training, STEM empowerment, and job-sharing initiatives.

Sources: <u>Harvard Business Review - Women in Leadership</u> | CRIF - Diversity Report 2025

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INNOVATION LEAD BY #7 PSYCHOLOGICAL SAFETY

Fears about climate change, pandemics, and trade conflicts follow people into the workplace. A culture of **psychological safety** anchors personal resilience, empowering team members to share unconventional ideas and take risks without fear, thus boosting wellbeing, resilience, and creativity—key for innovation.



Environments that unite people and physical spaces are equally important to **create special**, **personal moments**. Studies indicate that virtual meetings can hinder creative thinking. Spaces should encourage interaction and well-being with open designs and informal breakout areas for spontaneous idea exchanges.



"Support change with positive communication: Involve employees, explain transparently why something is changing - and what benefits it has for everyone. Constructive communication creates trust, team cohesion and better results". - Dr. Samareh Khosravi, epay

LEVER #7

To drive innovation, organizations must cultivate a culture of psychological safety where failure is acceptable. Strategic communication plays a crucial role in creating opportunities for meaningful inperson encounters, ensuring that innovative ideas are shared, developed, and implemented effectively.

MORE ABOUT FUTURE DAYS >



"In times of crisis, true innovative power emerges—and it begins with psychological safety. Only where people can speak up, disagree, and think along without fear does the courage to truly embrace the new arise."

- Alexandra Liepe, TRENDONE

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Leadership principles



Creative

problem-

solving

Failure and risk culture



creating special moments for teams

EXAMPLES

Workspace Diversity

When looking for office space, top decision-makers place particular importance on conference areas, ideas and creative spaces, and lively lobbies and event areas.

Further Reading: <u>Virtual communication curbs creative idea generatior</u> Fraunhofer Future Office: Was macht Büros in Zukunft aus?

FRAGMENTS OF THE FUTURE: SELECTED QUOTES



Diana Rauhut Mainova

The future is created when technology meets responsibility - leadership means shaping innovation in a fair, courageous and humane way.



Dr. Joachim Gripp Design Offices

The office is not a place of duty, but a place of opportunity for shared experiences and, above all, effective results. It's a catalyst for trust, innovation and collaboration. We curate spaces where people within the company and in leave with more energy than they came in with because they are shaping the future here.



Maj-Britt Pohlmann Aurubis AG

For me, the future lies in the systemic management of transformations optimally bringing together processes, technology and people, while taking into account the interactions the value creation network. Leadership sets the visionary goal and at the same time enables strength-based action by all individual players for joint sustainable success.



Johannes Rath Signal Iduna

Reducing complexity is one of the most complex tasks for managers today. We have to make decisions faster without losing depth - and at the same time create a culture in which innovation, diversity and excellence are not empty promises. The future belongs to those who don't look at technology, talent and transformation in isolation, but link them together intelligently.



Ralf Gernhold Deutsche Bahn

What we need is more courage and the clear will to actively take on challenges in fast-moving and complex times. Digitalization and Al are real leadership tasks - it's about managing large teams in the digital space and responsibly integrating intelligent systems into our working world.



Christina Sontheim Beirätin

With increasing geopolitical tensions, Europe's economic unity is becoming a decisive factor for the future. Only if companies work together more closely and develop common standards, platforms, and innovations can Europe provide a relevant counterweight to the major markets.



Verena Gründl **DMEXCO**

In my view, the importance of diversity is stagnating. More and more voices are currently forming against it, while others believe that we have already come far enough. There is a lack of pressure from US companies - a driver that has also brought many women into management positions in Germany.

INNOVATION SHORTCUTS: HACKS FROM OUR INTERVIEWS



Anca Eisner-Schwarz crif, DE

Don't just ask yourself whether you are hiring diverse talent - ask yourself where exactly in your decision-making processes you still need diversity of perspective. Teams with different backgrounds make better decisions, faster and with more future impact.



Claudia Tuchscherer ADAC

At our company, every manager is also a trend researcher - supported by a strong team for strategy and digitalization. The future is part of our culture, not just a department.



Anna Kopp Microsoft

Future readyness doesn't come for free - it takes time, courage and clear priorities. If you don't give your people time to learn, you shouldn't be surprised at the lack of innovation. At Microsoft, we invest ten full days a year in learning and experimentation – because standing still is ultimately more expensive. Learning days and promptathons turn knowledge acquisition into practical experience. The right mindset doesn't develop in day-to-day husiness



Thomas Langer Versicherungskammer Bayern

Cross-functional teams as a workshop for the future: Silos prevent the future. Collaboration across departmental boundaries promotes innovative solutions and increases the resilience of the organization.



Dr. Frederike Fritzsche Otto

Diversity in teams is the basis for ethical and sustainable Al. At Otto, we therefore rely on diverse development teams to recognize and avoid bias in Al systems. Only different perspectives lead to inclusive solutions



Nica Huestegge Capgemini

The biggest challenge for managers is to leave the beaten track and show innovative courage. Not: Can we allow AI and working from home? But rather: How do we exploit the added value of new technology and new needs? For the C-level, this means: listening, learning, networking, trusting - and making real decisions for the future!



Anja Steinkönig Bikeleasing

Create learning spaces for innovation and anchor tech expertise: introduce regular hackathons, offsites and learning camps where managers and employees can test and use technologies. As the Bikeleasing Group, we stand for trying out new things and establishing a culture of error through agile testing, which ultimately enables solutions and speed.

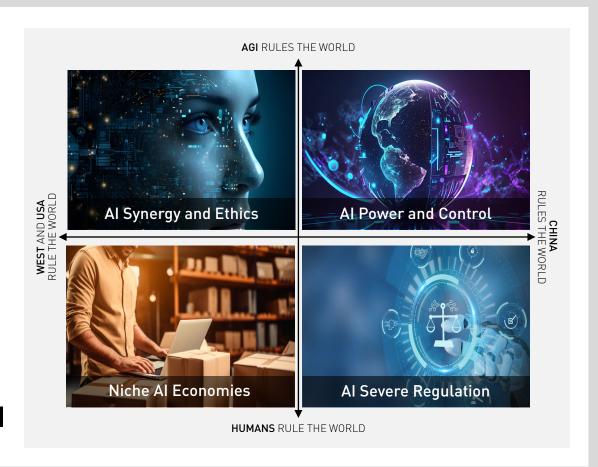
A LOOK BACK AT LAST YEAR'S STUDY

Our Innovation Leader Study 2024 anticipated that next-generation Al and geopolitical shifts would dramatically impact businesses and their models—a forecast now playing out in real time.

The current global race for AI dominance is centered on the United States and China. The U.S. focuses on cutting-edge research and a vibrant startup ecosystem, while China relies on massive state investment. This rivalry extends to national security concerns and broader geopolitical landscapes, with leadership in AI poised to reshape both international economic and security structures in the coming years.



"NEXT-GENERATION AI AND GEOPOLITICS
ARE ACTING LIKE MASSIVE TECTONIC
PLATES ON BUSINESS AND INNOVATION
ECOSYSTEMS. WE EXPECT A MAJOR
GLOBAL SYSTEM DISRUPTION AND
POWER SHIFT WITHIN THE NEXT DECADE"
- Hendrik Freund, TRENDONE



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THE STUDY DESIGN

Between April 2024 and March 2025, TRENDONE, Christiane Wolff & PMMG conducted qualitative interviews with **70 C-level innovation leaders** to find out what it takes to become an innovation leader.

In this study, we make the key findings from these interviews available to you in a concise format. Anonymized statements from the participants corroborate the status quo.

Make the most of this advance knowledge to work out the skill sets that you and your innovation teams will need to become innovation leaders.



 $[\]ensuremath{^*}$ All interviews and statements have been fully anonymized.

TREND GNE

ABOUT TRENDONE

With <u>TRENDONE</u> as a strategic innovation consultant, you will systematically identify your most valuable innovation opportunities.

Together, we will develop an effective innovation strategy and continually strengthen your future viability.

Our **digital tool** gives you direct access to the most important trends & the latest innovation topics. The <u>Trendmanager</u> supports your project work with customized research and helps you to create Trend Radars.



40+ permanent employees

We are a team of 40+ different personalities



20 years of future expertise

Our network enables us to generate in-depth practical knowledge and industry-specific insights.



Award-winning research approach

We have won many awards for our research and consulting approach

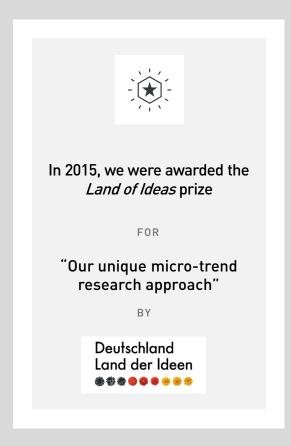


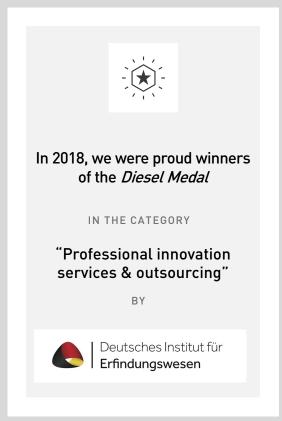
Global network of experts & scouts

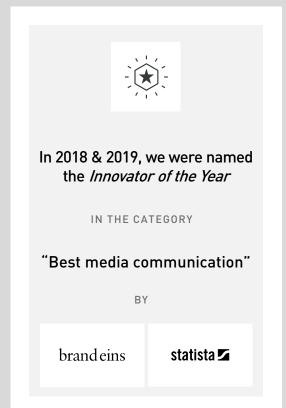
We are united by our enthusiasm for progress and fascination for the future.

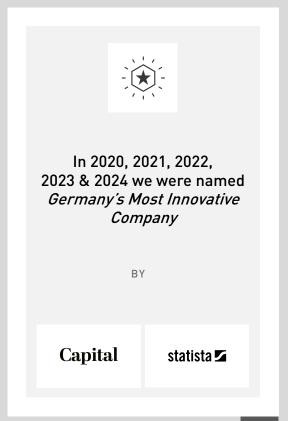
TRENDONE IS EXCELLENTLY POSITIONED FOR YOUR FUTURE

Our trend-based method has won us a wide range of awards:









TREND UNE

ABOUT CHRISTIANE WOLFF

Strategic Positioning & Communication for C-level Leaders

Christiane Wolff is a trusted advisor and communication strategist for top executives who aim to shape the future, build trust, and boost leadership visibility—internally and externally. With 20+ years in corporate communications, media relations, and executive positioning across D-A-CH and global markets, she combines strategic thinking, media expertise, and transformational storytelling.



Contact:

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What sets her apart:

- Works at the intersection of business, leadership, and communication
- Treats visibility as a business-critical leadership tool
- Leverages a deep network in media, Clevel, and thought leader circles

Impact:

- > Clear, focused, executive communication
- > Authentic visibility (internal & external)
- > Stronger leadership influence
- > Magnetic personal brand for talent, media, and stakeholders



Advisory

- Executive positioning & branding
- Thought leadership for transformation
- Personal brand development



Execution

- LinkedIn & content activation
- Internal communications for engagement
- Keynote messaging & media prep



Network

- Access to business media & journalist networks
- Speaker placements at C-level events



Strategic Focus Areas

- High-level decision-maker connections
- C-level positioning
- Trust-building in times of change and innovation storytelling

ABOUT PMMG

PMMG stands for consulting-oriented solutions - in the areas of content and processes. Our strength: the combination of technological expertise, industry know-how and implementation power.

For over 25 years, we have been advising first-class companies – independently, digitally, data-, and technology-based. With a 60-strong team of consultants, analysts, creatives, digital and AI experts, we transform business models, processes, content and organizations. Our own AI agents, strong technology partners and specific use cases make the difference and set new standards for our long-standing clients from DAX-listed companies and upper mid-caps.

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We develop data and Alsupported content strategies for your premium brands, perfectly tailored to your processes. This allows you to reach exactly the people you want to reach.



PMMG Process Solutions

As a technology-oriented consultancy for process- and data-based transformations, we create digital strength, secure competitive advantages and make transformation measurable.

ABOUT OUR PARTNERS

Through its 360° media ecosystem and its strong community in Austria and Germany, the **sheconomy** brand creates economic impact. sheconomy sees itself as an ally for female power as an economic factor, economic strength and innovation driver - for more personal and economic success! sheconomy combines different perspectives and success at all levels of the value chain: The personal success of the reader - The economic success of the company -The collective success as a society.

sheconomy

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Event & Project Manager

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Design Offices is the market leader for flexible workspaces in Germany. The company has been creating new working environments since 2008 and operates around 50 locations with approx. 260,000 square meters in 15 German cities. In addition to modern office space, Design Offices offers special services for users such as exclusive community events and gastronomic offerings as well as flexible spaces for business events of all kinds.

DESIGN OFFICES

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Enable2grow helps companies to transform their business in a future-proof way - with pragmatic strategies, operational experience and measurable results. A network of entrepreneurs, industry and functional experts thinks entrepreneurially, acts hands-on and focuses on feasible steps. The focus is always on people. Our particular strength lies in the successful implementation of complex transformation projects - for sustainable and measurable growth.

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TREK'D OKE

LET'S TALK - SHAPE YOUR INNOVATION HORIZON





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