

***"It's no longer the big beating the small,
but the fast beating the slow"***

Eric Pearson, CIO, IHG





Phänomen *Disruption*

Verstehen, Vorhersagen, Vermeiden

Christoph Fuchs
HOOD Group

REConf2025



What do these companies have in common

⚡ These companies were hit by digital disruption



2000

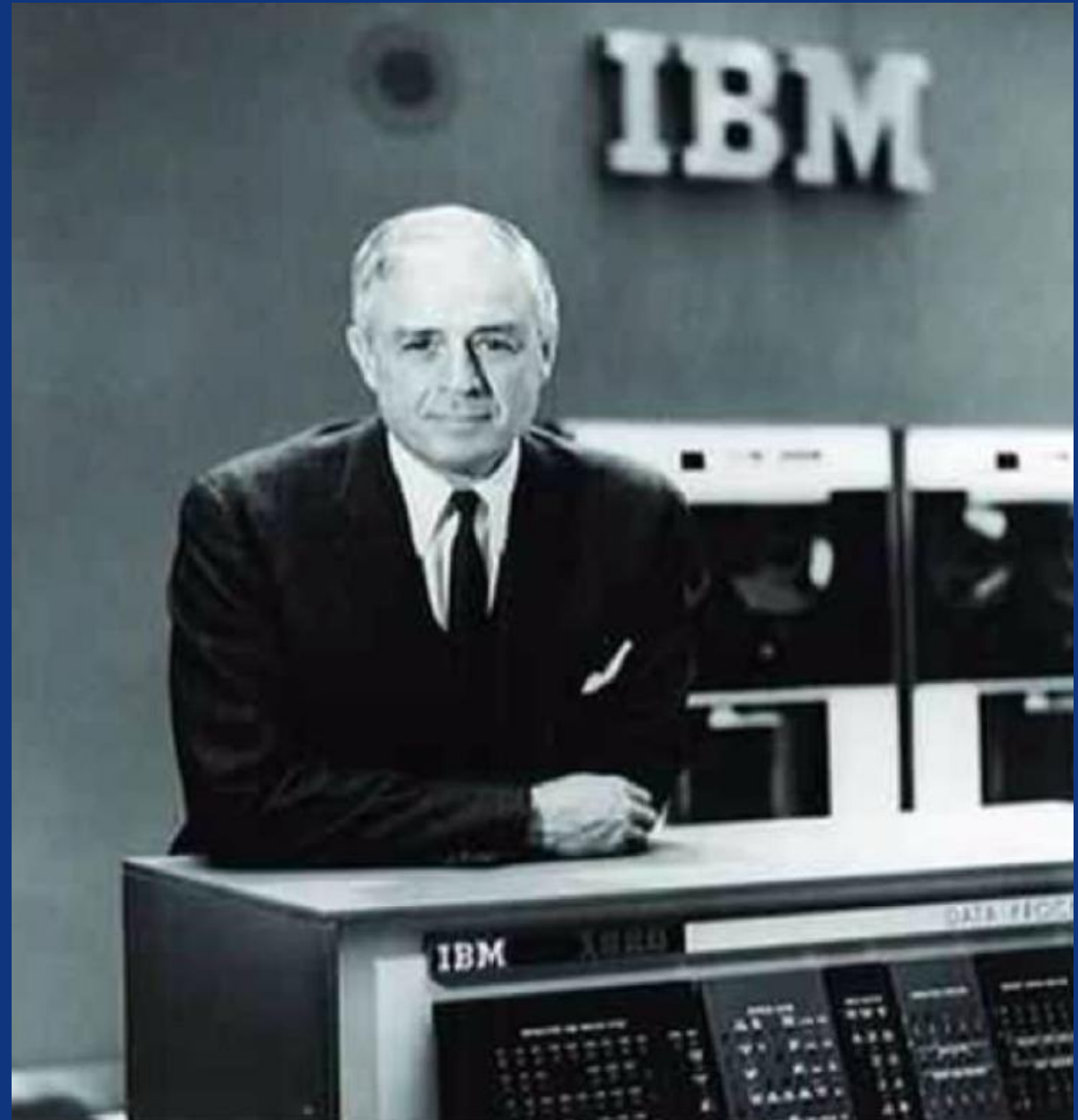
2005

2010

Digital Disruption

**"I think
there is a
world market
for about
5 computers"**

Thomas Watson (CEO of IBM), 1943



Start of Digital Disruption

First Transistor, 1947



Von den Anfängen bis zur Zukunft: Die Reise der Digitalen Disruption



Moore's Law

**1947-
1960**

Die Ära des
Transistors

**1960-
1970**

Die Ära der
**Mainframe-
Computer**
und der
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**1970-
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Die **PC-
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**Mobile
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**2010er-
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**Cloud-
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und Big
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**2020er-
heute**

Zeitalter
der
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Automati-
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Blockchain**

The digital disruption is in full swing



The world's largest taxi company owns no taxis (Uber)



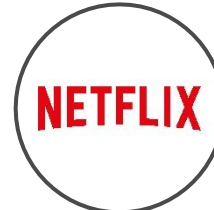
The most popular media owner creates no content (Facebook)

The largest accommodation provider owns no real estate (Airbnb)



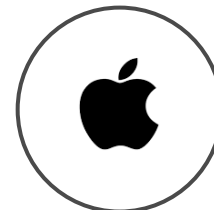
The fastest growing banks have no actual money (SocietyOne)

The largest phone companies own no telco infrastructure (Skype)

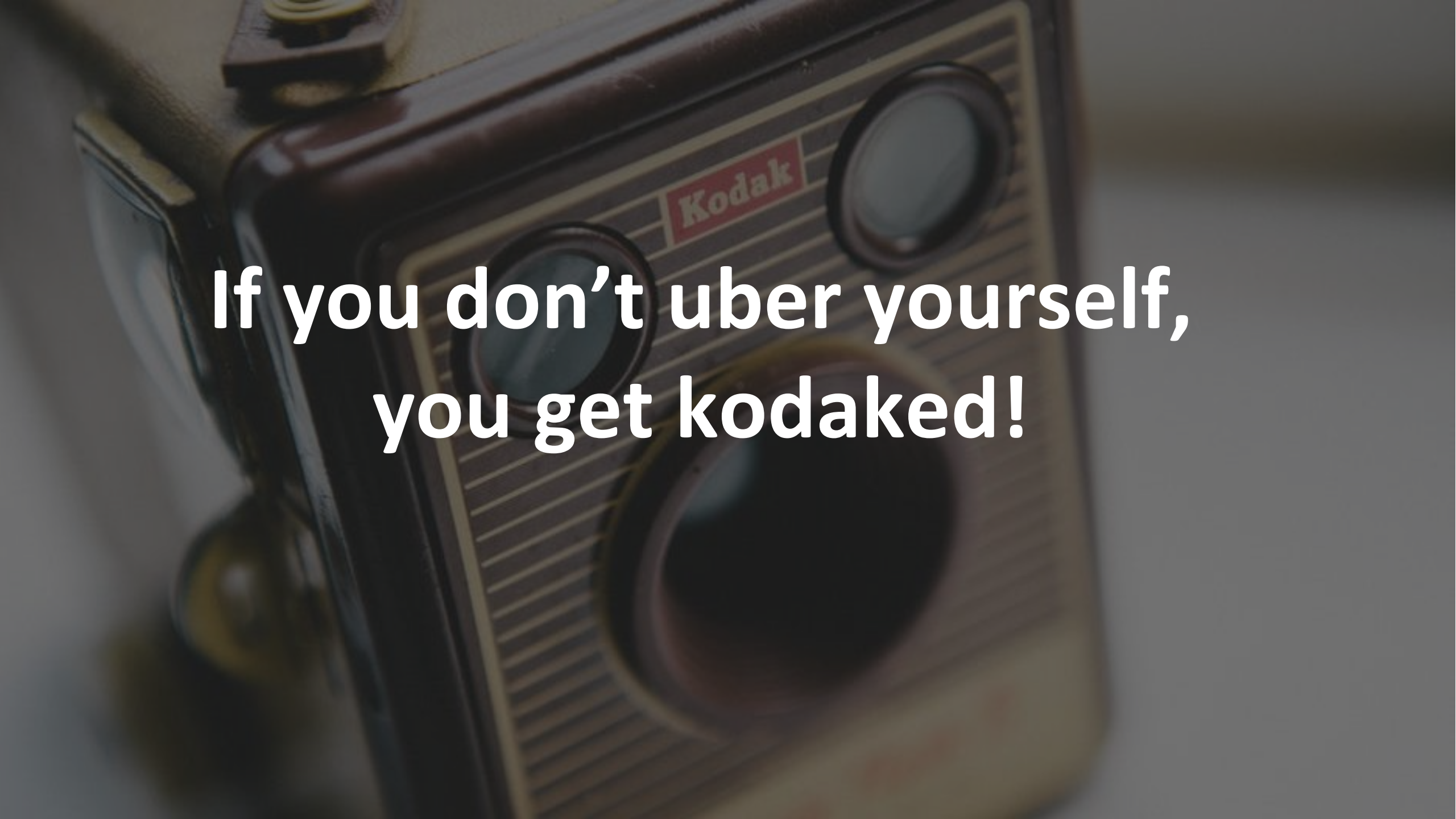


The world's largest movie house owns no cinema (Netflix)

The world's most valuable retailer has no inventory (Alibaba)



The largest software vendors don't write the apps (Apple & Google)



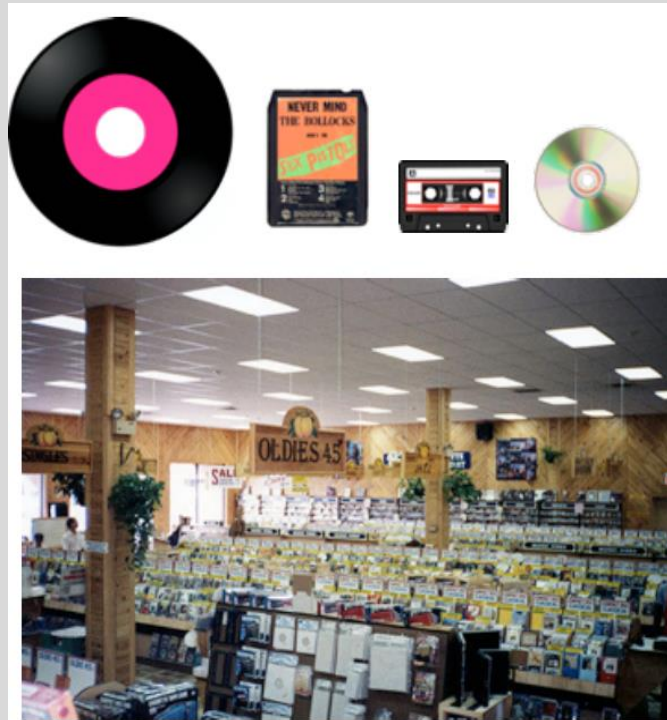
**If you don't uber yourself,
you get kodaked!**

Digital Transformation / Disruption of an industry

Example: Music Industry



~1900-1990er



~1990er-2010



~2010 - heute



Something truly interesting is happening in the market....



Financial Services



Mobility



Accommodation



Logistics



New competitors enter the market and attack traditional business models



Digital Real Estate & Construction Deutschland April 2020

PropTech
ConTech

#211
#45

Immobilienportale
und Marktplätze

#42

Immobilien
Vermietung / Verkauf

#27

Temporäre
Vermietung

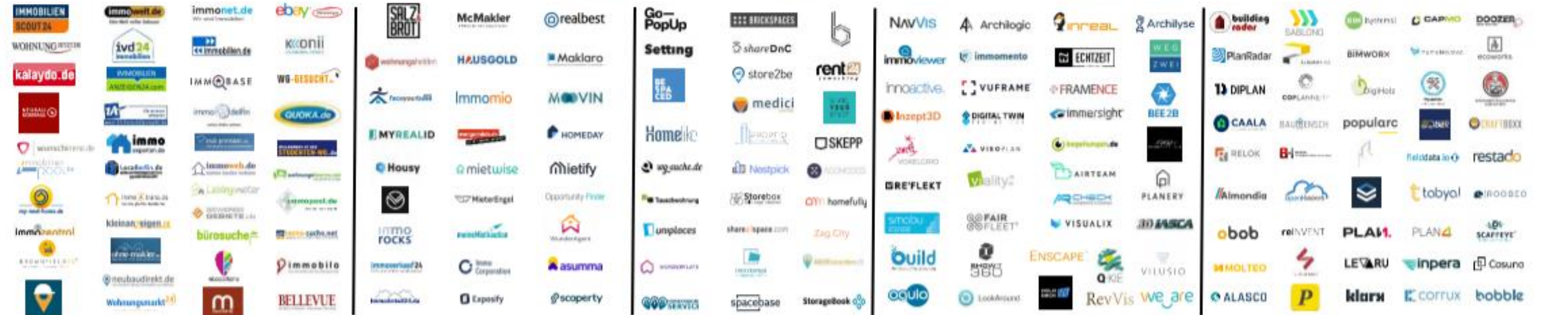
#29

3D
AR / VR

#38

Planen
Bauen

#45



Daten-
banken

#14

Daten-
räume

#14

Immobilien
Finanzierung

#22

Smart Building
IoT

#43

Immobilien
Management

#34

Services

#17

Automotive Market Cap



Elon's World
@ElonsWorld



Tesla is now officially the most valuable automaker of all the world!! Congrats!! 🎉🎉🎉 @elonmusk @tesla

Rank	Company	Mkt Cap (USD \$B)	Change (USD \$B)
1	 Tesla	183.67	9.20
2	 Toyota	178.78	-0.08
3	 Volkswagen	86.34	-0.11
4	 Honda	47.72	0.34
5	 Daimler	47.51	0.12
6	 BMW	43.74	0.08
7	 Ferrari	43.25	0.20
8	 General Motors	42.27	-0.46
9	 SAIC*	29.97	0.14
10	 Ford	28.87	0.08

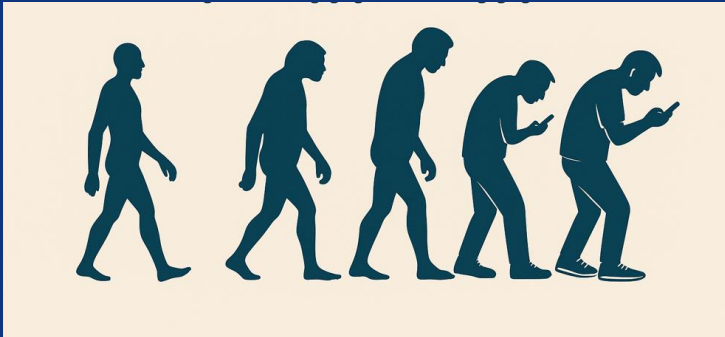
3:38 nachm. · 10. Juni 2020



87.797 10.199 Personen twittern darüber

Rank	Name	Market Cap	Price
1	 Tesla TSLA	\$ 684.00 B	\$214.11
2	 Toyota TM	\$ 255.81 B	\$189.80
3	 BYD 002594.SZ	\$ 96.64 B	\$34.70
4	 Ferrari RACE	\$ 89.22 B	\$496.79
5	 Mercedes-Benz MBG.DE	\$ 72.18 B	\$67.47
6	 Porsche P911.DE	\$ 68.23 B	\$74.90
7	 Xiaomi XIACF	\$ 60.97 B	\$2.49
8	 BMW BMW.DE	\$ 57.43 B	\$90.45
9	 General Motors GM	\$ 55.94 B	\$49.78
10	 Volkswagen VOW3.DE	\$ 55.20 B	\$106.57
11	 Honda HMC	\$ 52.88 B	\$32.95
12	 Tata Motors TATAMOTORS.NS	\$ 52.22 B	\$12.93
13	 Stellantis STLA	\$ 49.01 B	\$16.78

Evolution der Disruption: Homo Sapiens → Homo Smartphonus



Vom aufrechten Denker zum
gebückten Wischer

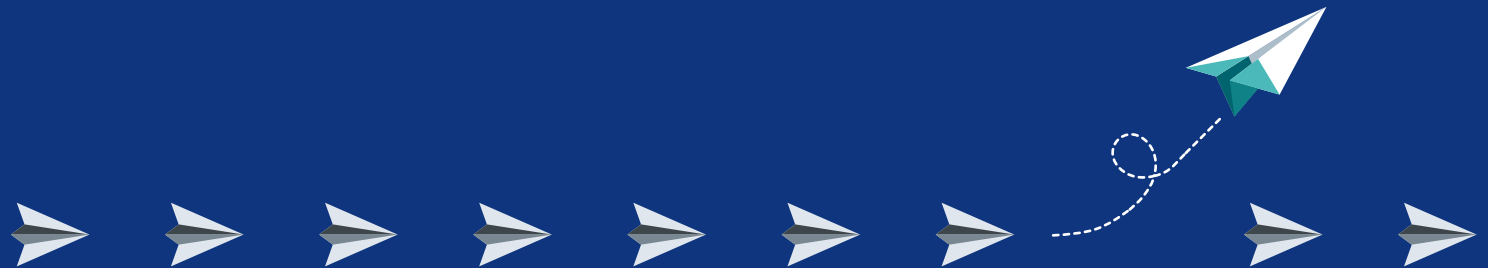
– Fortschritt sah noch nie so...
vernetzt aus.





How does it
feel...

to get disrupted ?



Imagine!



All your customer love
the performance
that only you can deliver

Your nearest competitor's
performance roadmap
is 3 years behind yours

Your sales numbers are
finally breaking one growth
record after the other

Uuuups ...



Really Fast ...



Nortel Networks



Really Fast ...



Nokia



Really Fast ...



Garmin



Really Fast ...

Kodak



- 1975
- 4 kg
- 23 sec
- 0,01 Megapixel
- ~30.000 \$



Kodak Disruption



Underestimating and ignoring two important 'outside trends' made Kodak fall

1

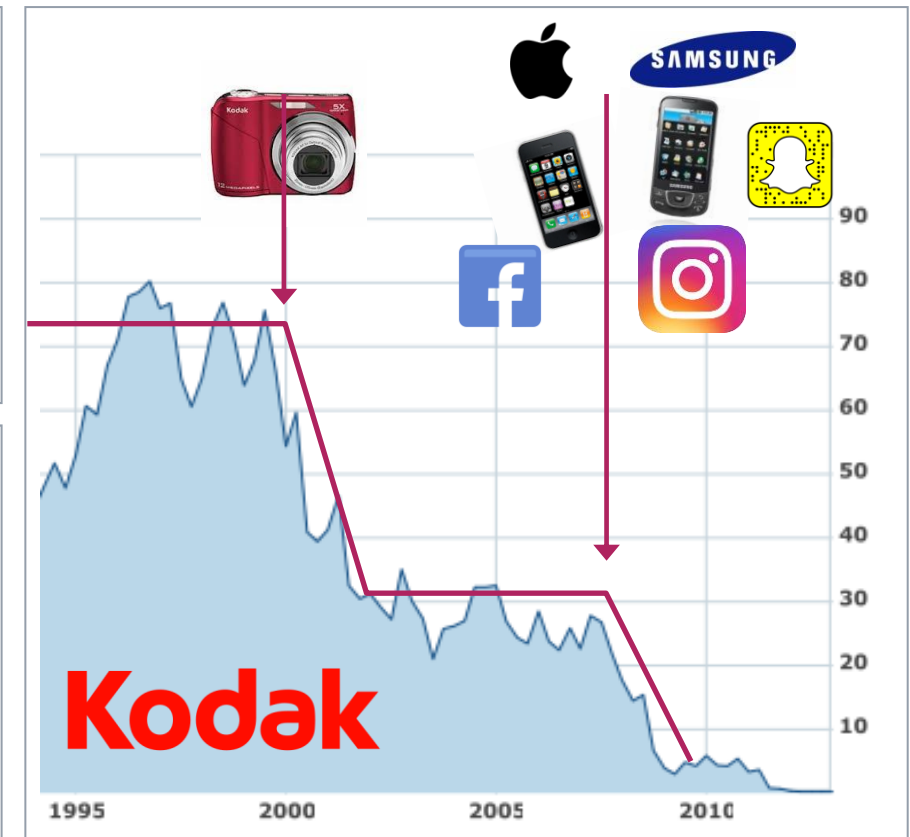
Mass adoption of Digital Cameras

- Invented 1974 by Kodak
- **In the 90ies: Kodak underestimated the foreseeable switch to digital cameras**
- 2002/3: Large-scale breakthrough of digit cams, Kodak stock cut in half

2

Social Media & Smart Phones

- **2002/3: Kodak underestimated the foreseeable extension of social media**
- 2009: Facebook = 148 Mio users, Kodak's stock lost 2/3
- 2012: Facebook ~1bln users, Kodak goes chapter 11



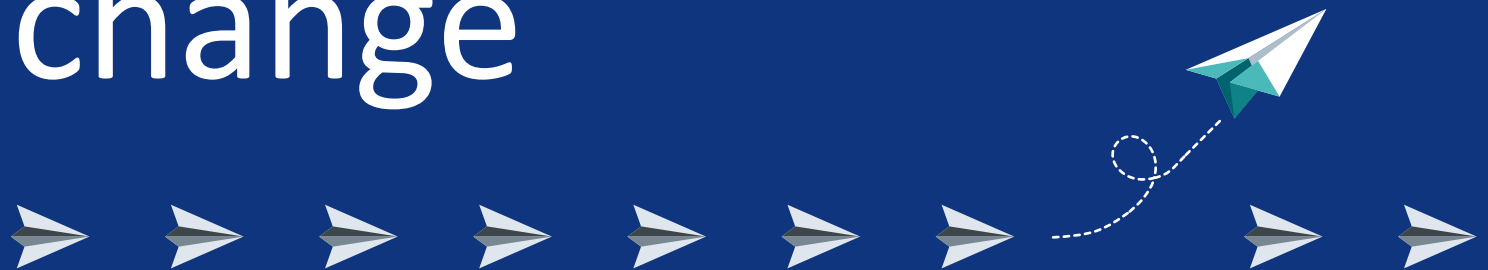


All these failures
were based on the same universal dynamics



The
phenomenon
is called

Disruptive
change



Theory by Clayton Christensen



Clayton Christensen
Harvard Business School

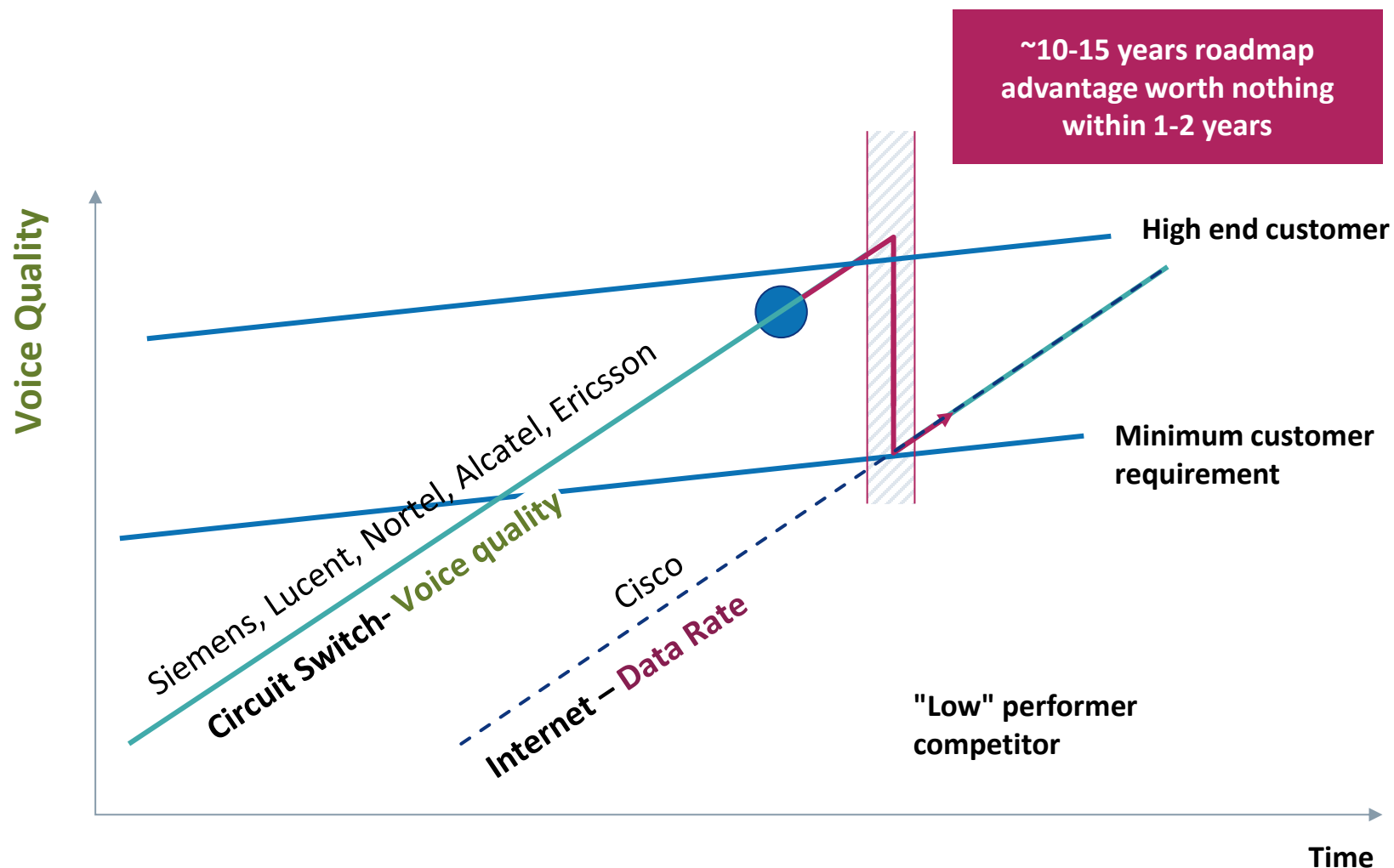
- **A theory is a statement of what causes what & why**
- **It helps understanding, explaining and making predictions about a given subject matter**

Disruption of the largest Siemens business unit – Siemens Mobile





The modern story of “David against Goliath” ...



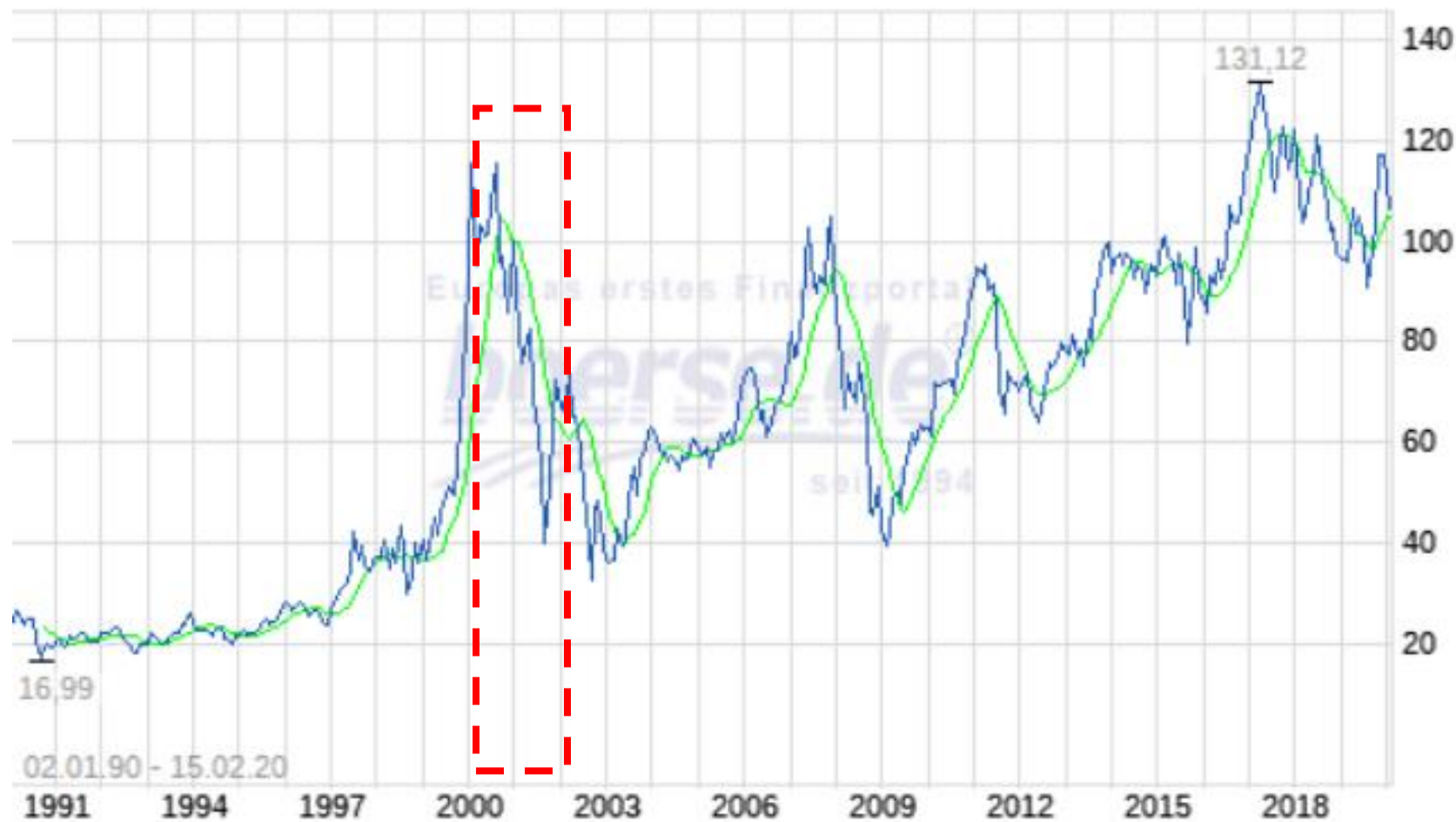
Just before you die, you make the best deals of your life!

Really Fast ...

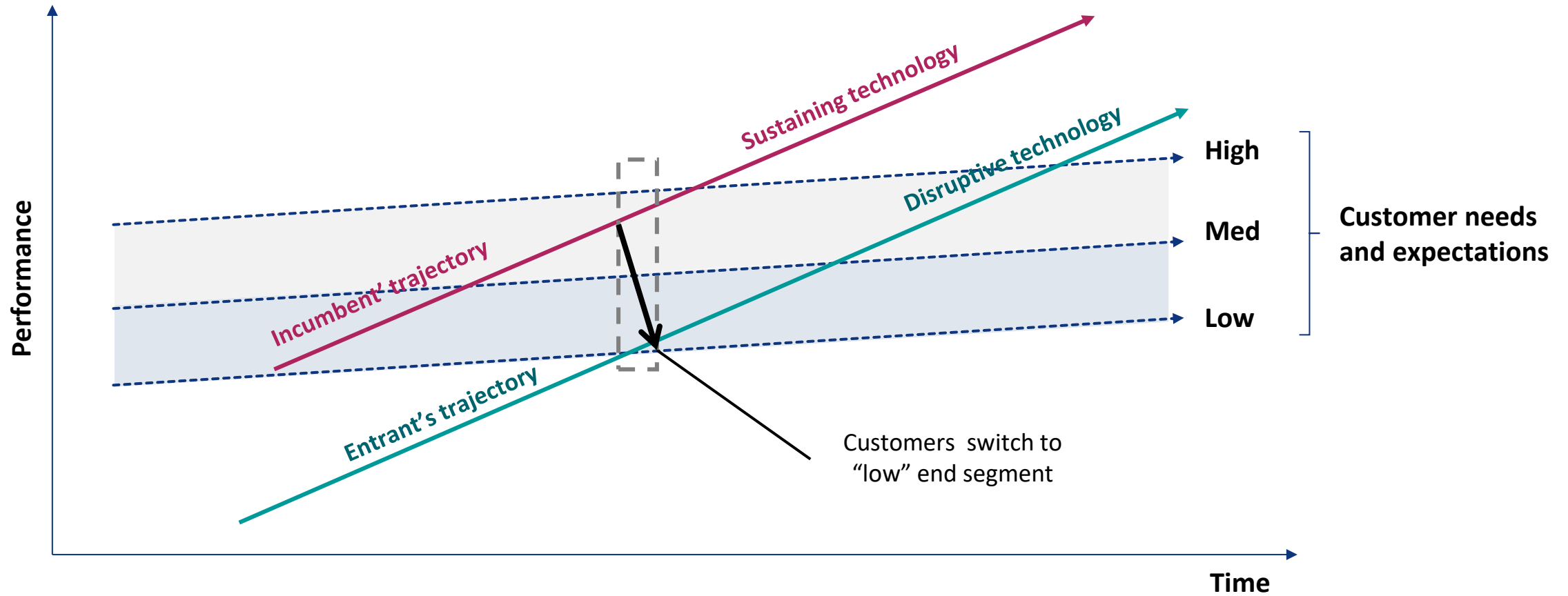


SIEMENS

Ingenuity for life



Theory of disruptive innovation



Adapted from C. Christensen et al.

The missed identification of minimum customer requirements drives the most rapid changes



Don't use performance
roadmap comparison
to predict catastrophic
changes in technology,
product portfolio or
industry structures ...

... but map
minimum customer
requirements, instead

**What are the biggest hurdles
for existing companies to
protect themselves from
disruption?**

1984



What do these companies have in common

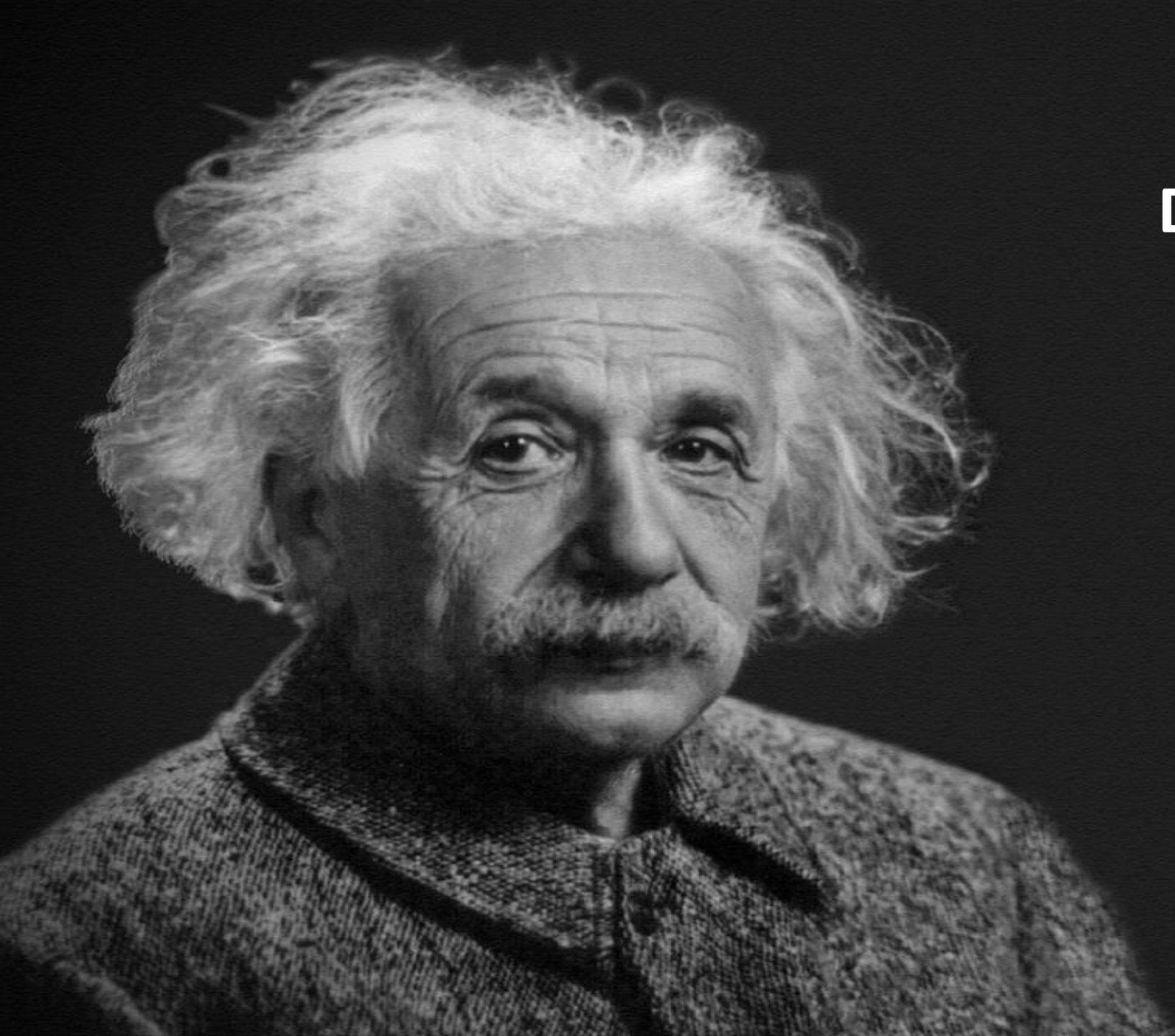
⚡ The technologies didn't fall from heaven



2000

2005

2010



**Die reinste Form des
Wahnsinns ist es,
alles beim Alten
zu belassen
und zu hoffen,
dass sich
etwas ändert.**

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Zukunft

Zukünftige Phasen der Digitalen Disruption ?

- Die Ära der Superintelligenten Künstlichen Intelligenz
- Das Zeitalter des Quantencomputing
- Das Zeitalter des Mensch-Maschine-Fusions (Human Enhancement)
- Das Zeitalter der Virtuellen und Erweiterten Realität
- Das Zeitalter der Synthetischen Biologie und des Biotechnologischen Fortschritts
- Das Zeitalter der Autonomen Systeme und des Internets der Dinge (IoT)
- Das Zeitalter des Weltraum-Zugangs und der Kolonisierung
- Das Zeitalter der Klimatechnologien und der Nachhaltigkeit



**"Your future hasn't been written yet.
Your future is whatever you make it.
So make it a good one."**

*Doc Emmet Brown
Back to Future*

