

An aerial, top-down view of a multi-lane highway. The road is divided into several lanes with white dashed lines. Traffic is moving in both directions. In the center, there are two lanes with white arrows pointing in opposite directions. The road is flanked by concrete barriers. The background is a dark, textured surface, possibly water or a dark ground.

The three **routes** of trailblazing

by Liselore Havermans, Anna
Fenko, Afroditi Terzi, Ji-ye Oh
& Menno van Dijk

ScaleUpNation

The 3 routes of trailblazing

Trailblazers are impact scale-ups that change their industries. They do this by envisioning a better future, raising the bar in their industry, collaborating with high leverage partners, and developing the market for their type of offer. However, when looking at different companies, we can distinguish three main routes towards industry change: hyperscaling, frontrunning, and enabling others.

In some cases trailblazers scale at such a high rate that they change the industry through their own market share. These are hyperscalers. These companies can inspire followership, but if they reach their position as the main industry player (like Facebook or Amazon), they will have a major impact on their industry merely through their own market share. This is the only type of trailblazers for which industry followership is not a prerequisite for trailblazing.

However, in most cases, trailblazers need to inspire industry followership in order to change their industry. They need to have an impact beyond their own market share. Some trailblazers are frontrunners. They put all their effort into showing that it can be done and becoming so successful that others have to follow their lead. Other trailblazers take a

more proactive approach to inspiring change beyond their own market share. In addition to showing it can be done, they encourage industry followership and guide others along the way.

Hyperscalers

Hyperscalers are companies that grow really quickly to serve a large market and to become the first mover at scale. These companies usually make a huge impact even if they do not aim for it, simply by creating a lot of jobs and changing their industries. For example, Amazon essentially created e-commerce, and today it has over a million employees. Google has revolutionized the information search and has over 135,000 employees.

Hyperscaling companies tend to provide internet services, powered by innovative software and AI technologies, because in this case the marginal costs of serving any size market are virtually zero. Trailblazers taking this route leverage a model of increasing returns (models in which liquidity attracts liquidity, like platforms, or which tend to move towards one uniform standard over time) to become the main player in the industry.

Example: Altibbi



[Altibbi](#) is the first website in the Arab world that provides medical information and a telemedicine service that allows patients in 12 Arabic countries to directly communicate with 10,000 doctors. It is attracting more than 300,000 unique daily visitors, more than 45,000 queries from users per month; has 625,000 users in total, 150 doctors available at any moment, done 24,000 phone calls, 500,000 answered questions, a thousand questions are answered each day and it covers conditions, treatments, medications and tests in more than 88 medical specialties.

The company was founded in 2008 in Amman, Jordan, by MBA student Jalil Allabadi, who

was helping his father, Dr. Abdelaziz Allabadi, to spread medical information in the Arab region by creating and publishing updated, authenticated, Arabic medical content online. They started by producing the first Arabic dictionary that included more than 86 medical specializations and then granted free access to that content by putting it online. In 2016, remote consultation services were activated, and users could contact doctors at any place and time via the internet or telephone. In 2016, it had 90 million unique sessions and thousands of consultations. In 2020, the company expanded to 12 Arabic speaking countries, consulted 3 million people & provided digital health services to 300 million people.

In the Arab region, there are 144 million individuals looking for medical information on the Internet. However, only 3% of online global content is in Arabic. With over 400 million people in the region lacking access to basic health services, Altibbi's business model was destined to be a huge success. Altibbi is not the only initiative that popularizes medical content in the Arab region. WebTeb and Super Mama are web platforms that offer medical information around pregnancy and healthy lifestyle, but these are not interactive platforms; they do not provide communication between doctors and patients. Another web platform in the Arab region, Shezlong,

provides anonymous online psychological therapy by professional, certified therapists through video conference sessions and online chat-rooms. But Altibbi is the only platform that covers a wide range of medical topics and gives patients access to general practitioners, pharmacists, and specialized medical doctors who answer online questions and can refer the patient to the doctor or direct them to a hospital or radiology center.

Altibbi leverages AI and other cutting-edge technical innovations that allows it to scale. The company has built a machine learning system that analyzes users' questions and automatically categorizes them to be sent to different doctors. Automation is crucial for scaling access to medical information as it allows more questions to be answered and more doctors to get engaged.

Another strategy Altibbi implements to enter new markets is high-leverage partnerships. For instance, the company partnered with Telecom Egypt and gained support from the Egyptian government to enter the Egyptian market with an initiative to offer free telehealth services to 1 million people.

In 2019, Altibbi was selected by the World Economic Forum and the Bahrain Economic Development Board (EDB) as one of the 100

Arab start-ups shaping the Fourth Industrial Revolution. Jalil Allabadi also won the Social Entrepreneur Award by Schwab Foundation for Social Entrepreneurship and the World Summit Award for best digital content in the health and well-being category.

“The rapid growth of our company over the past years has clearly illustrated the ever-growing demand for innovative health solutions in our region”, says Jalil Allabadi, the founder and CEO of Altibbi. “We are delighted to witness first-hand how our products are solving real problems. Altibbi is proud to provide cutting-edge, inclusive health services and looks forward to further strengthening these solutions.”

Frontrunners

Trailblazers that take this route are so successful that their impactful and profitable example unleashes industry followership. With their innovative offer, frontrunners raise the bar on both impact and key buying factors. They create tipping points: products that make the market take off. These products are innovative, cost competitive, they delight consumers and make the world a better place.

Example: Impossible Foods

IMPOSSIBLE™

[Impossible Foods](#) began in 2011 with an ambitious goal: to drastically reduce humanity's destructive impact on the global environment by completely replacing the use of animals in food production. The idea for Impossible Foods came to its founder Patrick O. Brown while he was on sabbatical from his position as professor of biochemistry at the Stanford University School of Medicine. In reflecting on how he could use his training and experience to make the largest positive impact on the world, he realized there was a way to make delicious, affordable meat and dairy products directly from plants. That would be better for the environment and for consumers. He started Impossible Foods, a company that is a frontrunner in creating the world's most delicious, nutritious, affordable and sustainable meat, fish and dairy replacements directly from plants.

The company has created Impossible Burger, a product that tastes, smells and looks like a regular burger, but uses significantly less water and land, and causes significantly less greenhouse gas emissions and freshwater pollution than a burger made of beef. Impossible Burger became available in

thousands of restaurants and grocery stores in the United States and the world. It was recognized as the top plant-based burger by the New York Times and received the Food and Beverage (FABI) Award from the National Restaurant Association. World Economic Forum named the founder of Impossible Foods Patrick O. Brown a Technology Pioneer for his design, development and deployment of new technologies and innovations "poised to have a significant impact on business and society".

The brand has done very little traditional advertising, relying instead on earned media, influencers and high-profile partnerships. Driven partly by their resonating impact narrative and highly successful product, worldwide search interest for the term "plant-based meat" skyrocketed.

Impossible Foods is playing an important role in developing the global meat substitute market, which has now grown to \$4.1 billion and is expected to double by 2026. They have a growing number of competitors in this market (such as Meatless Farm, Beyond Meat and De Vegetarische Slager). Together they are benefitting from the growing consumer interest in plant-based food and are now competing for their share of this growing market.

Enablers

Some trailblazers go beyond demonstrating that you can be successful in combining high profit with solving a serious societal problem. To enable other industry players to follow their example, they share their technological knowledge and intellectual property within the industry by initiating a movement, using creative commons, open-source and commercial licensing, training and support to push the industry in the right direction.

Example: Tony's Choclonely



In 2002, Dutch investigative reporter Teun van de Keuken found that none of the chocolate manufacturers were upholding the agreements made in 2001 to produce 'slave-free' chocolate. He decided to take action himself by eating 17 bars of chocolate and subsequently taking himself to court for "knowingly purchasing an illegally manufactured product". To make a case against himself, he convinced four former cocoa plantation child slaves from Ivory Coast to testify against him. In 2007, the Dutch attorney general dismissed the case for being outside of the Dutch jurisdiction.

When none of the companies he contacted showed any interest in producing chocolate bars differently, he started manufacturing his own chocolate from 'slave-free' cocoa.

Tony's communication strategy is based on understanding that in order to promote your social mission, you first need to win consumers with your product. "What people like about [Tony's Choclonely](#) is the fact that we make surprisingly tasty chocolate with attractive packaging and clear communication of our mission. We resonate with people by offering them an indulgent product (chocolate) and a possibility to do something good for the world", explains Ynzo van Zanten, Chief Evangelist at Tony's Choclonely. "People tend to think about impact and profit in antagonistic terms, but they are integrated. We scale our impact by growing exponentially".

However, even the exponential growth of their own sales was not enough to completely eradicate the modern slavery. That's why the company shifted its focus to bringing all industry players together on the road to slave-free chocolate. "Our mission now is "Together we make 100% slave free the norm in chocolate", explains Ynzo van Zanten. "We can make much more impact if all the other players change their practice. Our biggest

strategy now is to inspire other companies to take action and responsibility”.

To encourage industry change, Tony’s Choclonely has created an open source platform that allows other chocolate producers to join the efforts in changing the industry practice. One of the biggest Dutch food retailers, Albert Hein, has joined the platform, making a big step towards the positive changes in the food supply chain.

Tony’s also actively seeks customers that are willing to advocate for their cause and share their story. The company encouraged consumers to help in promoting industry changes. They ask chocolate lovers to become their “serious friends” by sharing their mission with others. They now have more than 65 thousand ‘serious friends’ who help them to change the industry.

How are you aiming to change your industry? Being a hyperscaler is extremely rare. The two more common routes are becoming a frontrunner by growing your own market or becoming an enabler of the others by publicly

advocating for your mission and sharing your knowledge. In our research we have found that scale-ups take a more competitive stance, while stall-ups tend to take a more collaborative approach. But being competitive drives your own success, not necessarily the industry-wide impact. Is your strategy more competitive or more collaborative? Envisioning the different routes to change your industry as a trailblazer can help you reflect on what is the most fitting path for your organization.

How we did our research

The research into scale-ups and trailblazers was supported by Goldschmeding Foundation and included a review of the academic and practitioner literature, 45 interviews with impact scale-up chief executive officers and experts, four reflexive dialogues with chief executive officers of trailblazers and impact scale-ups and database reviews of more than 3,500 organizations in the scale-up phase (including – partly overlapping – databases of 3,585 EU-based deep technology companies in the scale-up phase, 1,711 Dutch companies in the scale-up phase, 521 Dutch venture-backed companies, and 30 trailblazers from throughout the world and their matched pairs of impact scale-ups with similar offers). Next to being used as the basis of the current white paper, the findings of this research are translated into papers, training programs and due diligence tools.

This paper is written by Liselore Havermans, Anna Fenko, Afroditi Terzi, Ji-ye Oh and Menno van Dijk.



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