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**POLICY DEPARTMENT**  
STRUCTURAL AND COHESION POLICIES **B**

Agriculture and Rural Development



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**Transport and Tourism**



**RESEARCH FOR TRAN  
COMMITTEE - TOURISM AND  
THE SHARING ECONOMY:  
CHALLENGES AND  
OPPORTUNITIES FOR THE EU**

STUDY





**DIRECTORATE GENERAL FOR INTERNAL POLICIES**  
**POLICY DEPARTMENT B: STRUCTURAL AND COHESION POLICIES**

**TRANSPORT AND TOURISM**

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**TRAN COMMITTEE - TOURISM AND THE**  
**SHARING ECONOMY: CHALLENGES AND**  
**OPPORTUNITIES FOR THE EU**

**STUDY**

This document was requested by the European Parliament's Committee on Transport and Tourism.

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**Abstract**

The impacts, challenges and opportunities caused by the fast-growing sharing economy in tourism are assessed. The report describes the definition, size, and development of the sharing (or collaborative) economy, assessing the (dis-)advantages for the tourism sector, concluding with policy analysis and recommendations. Large parts of the sharing economy are affecting the tourism sector, although its share is very small. The main challenges are taxation and regulation; main opportunities are the innovative power and enhanced competition.

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## LIST OF ABBREVIATIONS

- B2B** Business to Business
- DMO** Destination Management Organisation; generally local governments or tourist boards
- EESC** European Economic and Social Committee
- ICT** Information and Communication Technology
- IT** Information Technology
- i-team** Innovation team in a governmental context
- MOOCs** Massive Open Online Courses
- P2P** Peer-to-peer, i.e. from private to private person.
- SME** Small and Medium Enterprise
- STR** Short Term Rental



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## EXECUTIVE SUMMARY

### Background

Borrowing a car from a friend or lending a spare room to a visitor is not really new, but the massive interest in technology-facilitated sharing between strangers has been in the headlines constantly over the past few years. The sharing economy, as we called it in this report, makes available unused private assets and capacity (labour) to be valorised and used.

The sharing economy has been initially greeted with much enthusiasm, but more recently has been found to be 'disruptive' to the existing, conventional economy. The most well-known examples are often tourism-related and affect the accommodation sector (e.g. Airbnb, a platform enabling peers to rent a spare room or their whole homes to visitors) or local transportation (e.g. Uber, which uses peers to provide taxi services to visitors).

### Aim, objectives and definitions

This report aims to explore and describe the following issues:

1. Current situation and global developments of the sharing economy in the context of tourism;
2. Advantages and disadvantages of the sharing economy in relation to the main goals (global competitiveness, seasonality, sustainability, accessibility, etc.) of the EU tourism policy;
3. Best distributive and communicative practices by which "alternative tourism" is performed, within EU, and how it differs from traditional tourism.

When dividing enterprises found in the sharing economy between *non-profit* and *for-profit* at one hand and between *peer-to-peer* and *business-to-peer* on the other hand (see Figure 1 in Section 1.3), only for-profit platforms offering business-to-peer<sup>1</sup> products or services (e.g. accommodation booking sites such as booking.com) do not belong to the sharing economy, according to the definition adopted in this report:

The sharing economy is a set of practices, models and platforms that, through technology and community, allows individuals and companies to, at least partly, share access to products, services and experiences. It includes non-profit and for-profit platforms that have emerged from an originally pure sharing economy, peer-to-peer and/or non-profit organisations.

Typical business models for sharing platforms include a fee per transaction, subscription plans, or sales of the platform technology to be operationalized by the customer and membership fees for customers.

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<sup>1</sup> 'Peer' is equivalent to 'customer' in this context.

## Trends

The sharing economy has grown rapidly and was valued at about \$26 billion in 2013<sup>2</sup>. Although this is an impressive figure, in the context of the global economy, it is only 0.035%. The most valuable sharing economy enterprises are tourism-related, where the sharing economy constitutes about 1% of its value. A Texan example showed the development of Airbnb accommodation to have followed an S-curve, slowing down in its 6<sup>th</sup> year.

In the competition between sharing platforms, increasingly, the 'winner takes all'. This trend is caused by the increasing customer attraction and value of a high volume of listings, while at the same time the cost per listing decrease.

Furthermore, many sharing economy platforms start as non-profit based on idealistic motives, but, when successful, attract the attention of investors and shift towards for-profit models. Also, the pure peer-to-peer sharing then tends to shift to business-to-peer. Thus, there is a tendency for the big players to shift to for-profit/business-to-peer and out of the sharing economy. For instance, CouchSurfing developed from non-profit to for-profit peer-to-peer. Uber now also serves businesses to hire their taxi drivers, thus entering for-profit/business-to-peer, but is still also firmly established in for-profit/peer-to-peer.

The following drivers for sharing economy development were recognised:

1. Technological innovation (e.g. networking and mobile devices platforms)
2. Peer motivations (e.g. empowerment, openness, altruism)
3. Economic drivers (e.g. almost zero marginal cost)
4. Environmental pressures (e.g. climate change, resource use)
5. New digital institutions (e.g. peer review trust generating mechanisms)

The primary driver appears to be technology, whilst economic drivers support the shift to for-profit models. The sharing economy has an impact on the conventional economy. Traditional tourism businesses reacts in various ways, including new business models, shifting revenues from direct sales to advertising, and buying enterprises emerging in the sharing economy.

## Best practices and lessons learned

At the beginning of 2015 almost 500 tourism related sharing economy platforms existed; 11% of these dealt in travel (and accommodation), 50% transport and 39% leisure. The main issues found with the sharing economy are the evasion of regulations, licensing, and taxes. Effects include missed tax revenues, an uneven economic playing field with the conventional economy, and increased risks for both producers and consumers. The consolidation of power in the biggest platforms reduces the competitive power of other stakeholders in the sharing economy.

The biggest accommodation platforms working globally are Tripping, Airbnb, Homeaway and Housetrip. For transport, the largest are Uber, Lyft and Blablacar. Upcoming are bike and boat sharing platforms like Spinlister and Boatbound.

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<sup>2</sup> The reference for this number is not entirely clear about what this number covers: it may be just the room rental sharing economy, which covers the majority of the whole sharing economy.

## **The sharing economy and EU tourism policy**

The original ideal of a fully free sharing economy is undesirable from a governance perspective. The main issues with the sharing economy are in taxes, licensing & certification, safety, liability, trust, labour and competitive equity, types of legal form, and spatial planning. Failure to collaborate with local governments may in the end threaten the longevity of sharing economy business models.

Current legislation is dedicated to the ownership-based economy and less suited to govern the sharing economy. A general EU policy on governing the sharing economy does not exist. Research to support such a policy is almost non-existent. Main strategies for governance may be found in i-teams (innovation teams collaborating between government and stakeholders based on sharing economy platforms and technology), EU guidelines for DMOs, and creation of a best and bad practice database.

## **Conclusions and Recommendations**

The size of the sharing economy is still less than 1% of the formal economy, Most sharing platforms are growing fast, but some have already reached a phase of growth maturity. Within localized geographical areas, there appear to be limits to growth, for example around 10% of the overall accommodation sector. These limits also occur because successful sharing economy enterprises tend to move from pure non-profit platforms enabling peer-to-peer transactions to for-profit business-to-customer trade and thus away from the sharing economy into the formal economy. In this way, the pure sharing economy is an important initiator/innovator for the conventional economy.

The combination of a strong effect of volume of listings on a platform causing additional customer value and reduced cost per listing (addition listing costs virtually nothing) create a system whereby the winner takes all, causing market concentration. This is only one issue that may require some form of governance. Other issues include social discontent and disruption to existing enterprises and whole economies. Therefore, the original ideal of a fully free sharing economy is undesirable from a governance perspective. We recommend applying anticipatory governance that balances between sharing platforms' innovative power and their societal and economic disadvantages.

We also recommend using sharing economy principles for governance. Governments may provide more direct communication with citizens and stakeholders and may even unleash the skills of volunteers who can perform certain tasks that are otherwise too expensive to maintain.

The main strategies for governance are to draft and issue EU guidelines for DMOs on how to govern sharing economy initiatives, and develop and maintain a best and bad practice database. Also installing innovation teams in tourism (i-teams) is recommended. Better tourism-dedicated sharing economy research is necessary. First, the scope and scale of sharing economy must be analysed and reported on a detailed statistical level. Based on these findings, the mechanisms, relationships, and mutual effects between the sharing and conventional economy should be uncovered. This knowledge is required to develop governance for the traditional tourism economy and businesses to benefit from the sharing economy's innovative power, without long established value and infrastructure being lost. Consider the undesirable consequences of Airbnb accommodation overwhelming a destination at the cost of its well-established, even historic, hotels that in themselves form part of the attraction of the destination.





## 1. INTRODUCTION

### KEY FINDINGS

- **Airbnb** and **Uber** are two well-known, large and fast growing platforms of the tourism related **sharing economy**.
- The sharing economy can be described along two principles: the **platform orientation** (non-profit to for-profit) and the **type of product/service provider** (peer-to-peer versus business-to-peer – i.e. customer).
- **Definition of the sharing economy:** The sharing economy is a set of practices, models and platforms that, through technology and community, allows individuals and companies to, at least partly, share access to products, services and experiences. It includes non-profit and for-profit platforms that have emerged from an originally pure sharing economy, peer-to-peer and/or non-profit organisations.
- Current information about the impacts of the emerging sharing economy is **scattered and incomplete** making it difficult to come up with robust empirically based conclusions.

### 1.1. Sharing economy: what are we talking about?

A range of new terms like 'peer economy', 'collaborative consumption' and 'sharing economy' recently developed and discussed increasingly in the media, academia and the business world. Though the current sharing phenomenon started with digital information products like music and movies through peer to peer networks like Bitstream (Belk, 2014), it has now entered the tourism industry as hoteliers and taxi-drivers are now very aware of Airbnb and Uber (Stokes et al., 2014). Sharing is certainly not a new phenomenon (Belk, 2014) as people have always borrowed, lent, leased, rented and donated goods, services and time (Stokes et al., 2014). The current sharing economy revolution comprises individuals renting out assets they are not using like a spare room or a car or bicycle (Gobble, 2015). It is Internet and mobile technology that now allows individuals to arrange peer-to-peer transactions through specialised apps and websites (Gobble, 2015). **Actually the difference between 'old-fashioned' sharing and the sharing economy is that the latter is fuelled by the Internet age** (Belk, 2014).

The sharing economy is sold by many as a kind of social good, as it helps people to get money of their underused resources (e.g. by renting your car during the time you do not need it yourselves). Also it may strengthen communities as it is more based on reputation than money (Gobble, 2015). According to Zervas et al. (2014) there is a difference between the old sharing and the current 'sharing economy' that is more than renting goods or services at lower costs than provided through traditional providers. The key difference is that technological advances enable platforms<sup>3</sup> to operate at a large scale (Zervas et al., 2014).

The core principles of the sharing economy can be applied to many contexts, ranging from local destination SMEs up to multinational corporations. This creates uncertainty about the future development of collaborative economy (Stokes et al., 2014). In fact, new sharing economy companies are mainly internet based platforms that bring together individuals who have underutilized goods or services with people who would like to rent those goods or

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<sup>3</sup> In the context of the sharing economy a platform is a website that offers database and sales services to its users and producers.

services (Cusumano, 2015). Many of these platforms started as peer-to-peer (P2P), non-profit organisations, but several turned into commercial companies. For instance Couchsurfing, a platform for international travellers that used and offered a place to sleep, 'airbed' or 'couch' in the Couchsurfing language, for free, became commercial in 2008 (Germann Molz, 2013). Others, like Airbnb, have used the same concept, but started out as for-profit organisations and are now very profitable multinationals, earning a substantial percentage of each transaction (9% to 15% in the case of Airbnb)<sup>4</sup>.

The earnings for those that rent out their assets can be substantial. For example one rents his or her home on Airbnb for \$100 per night (12 days per month) and turns his or her Prius into a cab, via Lyft, earning \$100 per night (4 nights a week). Just like that the revenues will be \$3,000 per month (Market Revolution, 2013). An important difference of the sharing economy with the current mainstream model is the variety of roles adopted by both the supplier and end-user. Referring to the end-user as a consumer "is arguably a misnomer in the context of the shared economy since one of the objectives is to share resources among members in the form of a service as opposed to selling a product to a customer" (Cohen and Kietzmann, 2014: 281). Yet, the major platforms now appear to have become companies, with highly educated staff and multi-billion dollar investment behind them (Rifkin, 2014: 1). Their end-users are approached as consumers, their providers as commercial freelancers selling use of their assets.

Many of the well-known sharing economy companies and schemes are part of the travel service economy (accommodation, transportation, leisure). Tourism policy therefore needs to take this development seriously as it "creates new opportunities to enable more efficient markets, maximize utilization of available resources, and enable novel localized crowdsourcing modalities. Simultaneously, the sharing economy challenges legal regulations that are intended to protect safety, health, and labour rights" (Lampinen et al., 2015: 118). In sum, the new sharing businesses are neither simply Internet-based marketplaces nor idealistic platforms for purely non-commercial sharing. Instead, "the sharing economy has ushered in a new age where underutilized assets become peer-to-peer services for hire, enabled by the Internet and smartphones" (Cusumano, 2015: 32).

## **1.2. Aim and objectives**

The objective of the current study is to support the Parliamentary debate by defining the sharing economy and describe its consequences in terms of changes in production and consumption of tourism services and the mechanisms of its diffusion through social media and mobile technology. This report aims to explore and describe the following issues:

1. Current situation and global developments of the sharing economy in the context of tourism;
2. Advantages and disadvantages of the sharing economy in relation to the main goals (global competitiveness, seasonality, sustainability, accessibility, etc.) of EU tourism policy;
3. Best distributive and communicative practices by which "alternative tourism" is performed, within EU, and how it differs from traditional tourism.

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<sup>4</sup> 6-12% given by <https://www.airbnb.com/support/article/104> to which 3% always is added according to <https://www.airbnb.com/support/article/63>.

This study has focussed mainly on describing the sharing economy in general and the general policy issues it poses within the tourism context. The third issue above has been interpreted as mainly aiming to recommend tourism policies to enable the benefits of the sharing economy while reducing its disadvantages.

## **1.3. Definitions**

### **1.3.1. Introduction to the system of the sharing economy**

Defining the 'sharing economy' is not easy because so many terms for (elements of) the phenomenon are used. For instance, Belk (2014) lists sharing collaborative consumption, the mesh, commercial sharing systems, co-production, co-creation, prosumption, product-service systems, access-based consumption, consumer participation and online volunteering. Before defining the 'sharing economy' itself, we first seek to describe the main elements that together form this 'economy'. The development of the sharing economy has been facilitated by the emergence of technology enabling low cost P2P platforms. A number of types/functions of such platforms have been identified by Sundararajan (2014):

- Repurposing privately owned assets: Airbnb, relayRides
- Professional service provision: Uber (professional drivers), Kitchit (professional cooks)
- General-purpose freelance labour provision: oDesk, Taskrabbit
- Peer-to-peer asset sales: eBay, Etsy.
- Peer-to-peer education: Skillshare, Udemy
- Peer-to-peer lending: LendingTree

The problem with the above is that it divides platforms by different parameters, but not systematically. Both the types of produce, state/kind of ownership and the private or professional providence of the product/service are mixed. This is demonstrated by Figure 2, adapted from Schor (2014: 4) showing examples of different kinds of sharing economy products.

**Figure 1: Overview of sharing economy main elements<sup>5</sup>**

		Type of provider	
		Peer-to-peer	Business-to-peer
Platform Orientation	Non-Profit	<b>A</b> Food Swaps Time banks	<b>B</b> Makerspace
	For-profit	<b>C</b> Relay Rides Airbnb Uber Udemy	<b>D</b> Uber Kitchit Zipcar Udemy

Source: based on Schor (2014: 4)

As Figure 1 shows, all segments contain existing platforms. The original idea of the sharing economy was to exchange private assets peer-to-peer, meaning that a community of peers exchanged their unused assets with or without payment and through a free platform as depicted by Quadrant A, non-profit/peer-to-peer. Soon, the successful platforms drew the attention of existing technology-based companies and investors, exploiting the value in these platforms and shifting them through the Quadrants B of non-profit/business-to-peer and for-profit/peer-to-peer (C) and sometimes partly to for-profit/business-to-peer (D). For instance, Uber and Udemy, do both peer-to-peer sharing and business-to-customer selling. Note that in the quadrants A and C, the peer is just a private person, while in quadrants B and D the peer is actually a customer. In the latter case, the private person just buys through the platform, in the first the customer can both buy and sell or use and offer. It can be questioned whether platforms like Uber, that evolved from peer-to-peer business into business-to-customer, differ from platforms like booking.com, that existed before the sharing economy was conceived.

**1.3.2. Definition of sharing economy**

A general sense of the sharing economy is given by Botsman (2014: 24), who defines the “collaborative economy as a system that activates the untapped value of all kinds of assets through models and marketplaces that enable greater efficiency and access.” This definition encompasses sharing, lending, borrowing and renting services, and products like skills, utilities, and time and includes “peer-to-peer money services such as Lending Club (recently valued at \$3.8 billion), massive open online courses (MOOCs) providers such as Coursera, and idiosyncratic concepts such as BorrowMyDoggy” which allows sharing of time with dogs.

<sup>5</sup> Notes:

- Some platforms provide services in two quadrants like Uber and Udemy
- Food Swaps are network events where people exchange their homemade food without money changing hands. E.g. Apple for Eggs and the Food Swap Network (founded in 2010)
- TimeBanks: volunteer work for building communities
- Makerspace: knowledge sharing
- eBay (founded in 1995): auction website
- Lending Tree (founded in 1996): broker website for loans
- Kitchit: book a chef at home
- Zipcar: car sharing company (cars are owned by the company, consumers are members)
- Udemy (2010): online learning both non-profit and for profit

**Figure 2: Defining the spaces for collaborative economy and sharing economy**



Source: (Botsman, 2013b: 9)

The sharing economy is actually only a part, a subset, of the collaborative economy as shown in Figure 2. In the definition by Botsman (2013b), the sharing economy covers only peer-to-peer and part of business to consumer consumption, as shown by the red coloured area at the right side of the circle.

An important element of the sharing economy is 'sharing' (Belk, 2014: 1596), defined as follows: "sharing is the act and process of distributing what is ours to others for their use and/or the act and process of receiving or taking something from others for our use.

Market Revolution (2013: 14) defines the sharing economy as "A set of practices and models that, through technology and community, allows individuals and companies to share access to products, services and experiences".

As Figure 1 shows, companies in the for-profit/business-to-peer quadrant come very close to long existing commercial platforms like Expedia and booking.com that simply facilitate the sale of professional offers (air tickets, accommodation) to customers. However, companies like Uber and Udemy do stem from the sharing economy and do still offer peer-to-peer services. Such companies are included in the sharing economy. Pure business to customer sellers like booking.com and Expedia are not considered an element of the sharing economy. For the purpose of this report, we expand the previous definition to:

*The sharing economy is a set of practices, models and platforms that, through technology and community, allows individuals and companies to, at least partly, share access to products, services and experiences. It includes non-profit and for-profit platforms that have emerged from an originally pure sharing economy, peer-to-peer and/or non-profit organisations.*

### 1.3.3. Business models

An important question is how sharing economy platforms earn their revenues. In many cases, the platform charges a commission from either the customer or the producers of the asset it mediates (Sundararajan, 2014). There are a variety of business models in the sharing economy noted by Botsman (2013a), such as:

- **Service fee:** company takes a service fee for successfully matching buyers and sellers, hosts and guests, or borrowers and lenders. The fee taken varies across

marketplaces from 5% to 40% depending on the value of the transaction and the support services provided (e.g. Airbnb).

- **Freemium:** company offers basic services or use of the platform/app for free. Users then 'trade-up' for additional benefits and exclusive features (e.g. swap.com).
- **Tiered subscription plans:** company offers a range of subscriptions for different prices based on frequency of use or number of goods desired (e.g. Dimdom).
- **On-sale:** company purchases unwanted goods direct from customers and then recycles and re-sells the products (or its parts) for a higher value (e.g. Gazelle).
- **White label:** sells a back-end platform or piece of software that companies can customize and use (e.g. gettable).
- **Flat membership:** company charges a flat monthly or annual membership fee regardless of usage (e.g. Techshop).
- **Membership plus usage:** company charges a one-off or annual membership fee (sometimes with different plans offered based on frequency of use). Additional fees are charged based on usage (e.g. DriveNow).

In this report we chose to ignore the quadrant containing for-profit/business-to-peer platforms (Figure 1) unless they also offer services in non-profit/business-to-peer, as for instance is the case with Uber.

## 1.4. Conclusions and report structure

### 1.4.1. Conclusions

The sharing economy can be described along two principles: the platform orientation (non-profit to for-profit) and the type of product/service provider (peer-to-peer versus business-to-peer). This delivers four 'quadrants' (non-profit/peer-to-peer, non-profit/business-to-peer, for-profit/peer-to-peer and for-profit/business-to-peer) of which only the first three are really part of the sharing economy. The fourth, for-profit/business-to-peer, is considered to be actually part of the conventional economy, but makes use of similar technology. Well-known examples are many air ticket and accommodation booking platforms like Expedia and booking.com.

From the large number of definitions currently used for the sharing economy the following was adapted: *The sharing economy is a set of practices, models and platforms that, through technology and community, allows individuals and companies to, at least partly, share access to products, services and experiences. It includes non-profit and for-profit platforms that have emerged from an originally pure sharing economy, peer-to-peer and/or non-profit organisations.*

An important insight from the literature is that the sharing economy is too new to draw conclusions about its size, significance, future potential and its impacts on the conventional economy, welfare and growth (Sundararajan, 2014). Some studies have been published, for example Zervas et al. on the impacts of Airbnb in Texas (Zervas et al., 2014), but there are too few studies for a clear overview to be developed. However, the sporadic information available does raise questions about the unregulated development of the sharing economy and shows both opportunities and serious issues.

### **1.4.2. Report structure**

The report is structured in line with the three main aims of the study: Chapter 2 describes the current trends and developments and also looks at drivers and mechanisms causing the developments, linking these to the tourism sector. Chapter 3 describes best practices, some issues, and lessons learned. Chapter 4 describes issues with the sharing economy from a governance perspective, followed by a general assessment of the EU tourism policy and challenges. Subsequently, we offer some policy recommendations. Chapter 5 gives the final conclusions and recommendations.





## 2. TRENDS AND DEVELOPMENTS

### KEY FINDINGS

- The **global sharing economy** was valued at **\$26 billion** in 2013, most of which was tourism related (accommodation, transport, leisure, travel services). This corresponds to 0.035% of the global economy and less than 1.2% of the global tourism economy.
- **Successful sharing economy enterprises** tend to move from pure non-profit platforms enabling peer-to-peer transactions to for-profit business-to-customer trade and thus away from the sharing economy. In this way the pure sharing economy is mainly an **initiator/innovator** for the conventional economy and may change the way people look at and value **ownership**.
- The large investments in technology and the value created by the pure size of a platform create a system where **the winner takes all**, causing **market concentration** and **failing competition**.
- The **moral incentives** driving the pure sharing economy are quickly compromised when platforms and their 'free' private assets are discovered by investors and big IT companies, making them part of the conventional economy.

### 2.1. The promise of the sharing economy

The emergence of the sharing economy coincides with a general shift from the 20<sup>th</sup> century's passive consumers in the industrial economy to the emerging 21<sup>st</sup> century collaborative economy where consumers become creators, collaborators, financiers, producers and providers (Botsman, 2013b). Some foresee a change in the course of economic history due to the hundreds of millions of people who may enter the sharing economy (Rifkin, 2014). Expectations are high for the positive effects of such a shift, for instance on economic growth and welfare which would be fuelled by additional consumption, higher productivity and by additional individual innovation and entrepreneurship (Sundararajan, 2014). A promise of benefits to the environment and sustainability has also been assumed (Yannopoulou et al., 2013, Schor, 2014), but the downside of this development is recognised as well. With the rise of commercial platforms taking over the original non-profit ones, criticism has come from politicians, regulators, and commentators recognising disruption to existing businesses as well as societal institutions (Schor, 2014). Local governments are starting to investigate platforms to try to regulate their effects, and workers are trying to get to grips with changing labour conditions (Schor, 2014). The example of the Uber car transport system is often cited. Uber is backed by Google and Goldman Sachs but has shown anti-competitive behaviour, such as recruiting employees from competitors', while Uber managers use rhetoric promoting the virtue of 'free markets' (Schor, 2014). Such behaviour may impair the original goodwill of these sharing economy platforms as they become part of the business-as-usual economy (Schor, 2014). One rare driver of the sharing economy may have been the 2008 financial crisis, causing many to lose their homes and cars. More generally, the crisis made most consumers more price sensitive thus luring them to the generally cheaper sharing economy goods and services (Belk, 2014).

## 2.2. Size, trends, and developments

### 2.2.1. Size

The global peer-to-peer sharing economy has grown in a short time to the significant level of \$26 billion<sup>6</sup> (Malhotra and Van Alstyne, 2014). In 2013 Avis acquired Zipcar for \$500 million in an attempt to avoid having to compete with its existing products. Others followed suit like Google (\$125 million in Lending Club), Google Earth (\$30 million in Quirky) and General Motors (\$3 million in RelayRides) (Botsman, 2014). To demonstrate the size of the sharing economy some examples are given in Table 1.

**Table 1: Some key economic data of the sharing economy**

Couchsurfing	3 million people in all countries of the world
Bikesharing	2.2 million bikes/month in 2011
Car-sharing	\$3.3 billion in 2013
Peer-to-peer rental market	\$26 billion in 2013
Investment sharing economy 2011-2013	\$67 billion
Value of Airbnb at the end of April 2014	\$10 billion plus
Airbnb guests in 2014	25 million
Airbnb number of listings	1 million
Airbnb growth in global guest number 2014	47%
Share of UK population taking part in sharing economy	64%

**Source:** Market Revolution (2013), (Rifkin, 2014, Stokes et al., 2014, Airbnb, 2015)

Although the figures in Table 1 may look sizeable, in comparison to the conventional economy they are still modest, although growing rapidly. For instance, the \$26 billion global size (of the sharing economy) should be compared to the \$74,000 billion size of the world economy (a 0.035% share) and 1.21% of the global tourism economy (Data based on WTTC, 2014). According to Rifkin (2014), home-sharing accommodation is now approaching the value of the large hotel chains like Hyatt Hotels and Wyndham Worldwide. More impressive than the relative size of the sharing economy is its growth with almost 50% increase in 2014 alone compared to 2013 (Stokes et al., 2014). However, the global size of, for instance, Airbnb is less than 1% of guests when compared to the 21.86 billion guest-nights globally in 2010 (Gössling and Peeters, 2015). Even when average length of stay approaches somewhere between 4 and 7 nights, Airbnb still has less than 0.5% of the global number of guests.

When looking at the share of funding for the different categories of the sharing economy, the accommodation sector leads the way with US\$800 million, transport follows with US\$645 million and personal goods with US\$273 million. All others, like private spaces

<sup>6</sup> In an article in The Economist, Botsman is cited to give this number of \$26 billion to apply to the rental sharing economy (Airbnb, etc.) only. The Economist. 2013. *Peer-to-peer rental. The rise of the sharing economy. On the internet, everything is for hire* [Online]. The Economist. Available: <http://www.economist.com/news/leaders/21573104-internet-everything-hire-rise-sharing-economy> [Accessed 23-06-2015].

(US\$50 million), business equipment (US\$16 million), food (US\$11 million), logistics (US\$4 million) and storage (US\$0.3 million) fall far below (Tracxn.com, 2015: 8).

There is not much information about the participation of the population in the sharing economy. Some indications are given by Stokes et al. (2014) for the UK showing 64% of the UK population, one way or another, participating in the sharing economy. In terms of investment, the tourism-related sectors of accommodation and transport are the largest. In the UK, participation was highest for clothes (43%), media (34%), with transport (12%) and holidays (8%) further down the list (Stokes et al., 2014). Finally, it is interesting to see the difference between buyers and sellers (Stokes et al., 2014): for used items buyers exceeded sellers, 26% compared to 12%. For donated and free items it was reversed with getting (19%) exceeding giving (38%). One could expect that these proportions would be more equal. Borrowers and lenders are equal at 15%, while consuming lease/rent is 7%, seven times larger than those offering. All percentages refer to share of the UK population ever involved in the sharing economy.

Stokes et al. (Stokes et al., 2014) provide some insights into socio-demographic factors. There was no gender difference in participation, whilst those aged between 25 and 54 were more likely to participate than older or younger individuals. There is a continuous positive relationship with education levels, household size and children. Finally, those in work, living in rural areas or married participate more often than others.

### 2.2.2. Trends

One of the main trends in the sharing economy is that established corporations tend to enter the collaborative markets by buying collaborative businesses or adapting their own models to collaborative traits (Stokes et al., 2014). Some examples of these are (Stokes et al., 2014):

1. DriveNow: joint venture for car sharing with car manufacturer BMW and car rental firm Sixt in 5 German cities with 2350 vehicles. Started in 2011.
2. Avis paid \$500 million for Zipcar in 2013.
3. In 2014 Santander Bank partnered with Funding Circle founded in 2010. Funding Circle helped over 5,000 SMEs to get access to £305 million, creating some 15,000 jobs (Stokes et al., 2014).

This trend culminates in the largest players consuming their smaller competitors, as Google and Amazon have done in their respective sectors (Cusumano, 2015, Schor, 2014). This trend is already visible with just a few sharing economy platforms becoming very big in a short time, e.g. Airbnb and Uber (Cusumano, 2015). One could even speculate whether established 'digital' companies such as Google or Facebook will take over successful sharing economy start-ups.

A second trend involves diversification and facilitation. Not only are more services and products entering the sharing economy, but new platforms will support development of existing platforms. Companies will make it easier for everyone to play a part and bring peer-to-peer into everyone's life (Villano, 2014). Two examples that demonstrate this trend: *Breeze* and the *Evolve Vacation Rental Network*. *Breeze* (San Francisco) is an intermediary that offers customers who want to work as an Uber or Lyft driver, but have no car, access to vehicles week-by-week from others. *Evolve* (Denver), helps customers who want to post their spare rooms or houses on the HomeAway network (VRBO.com, HomeAway.com and VacationRentals.com), by creating a listing, professional photography

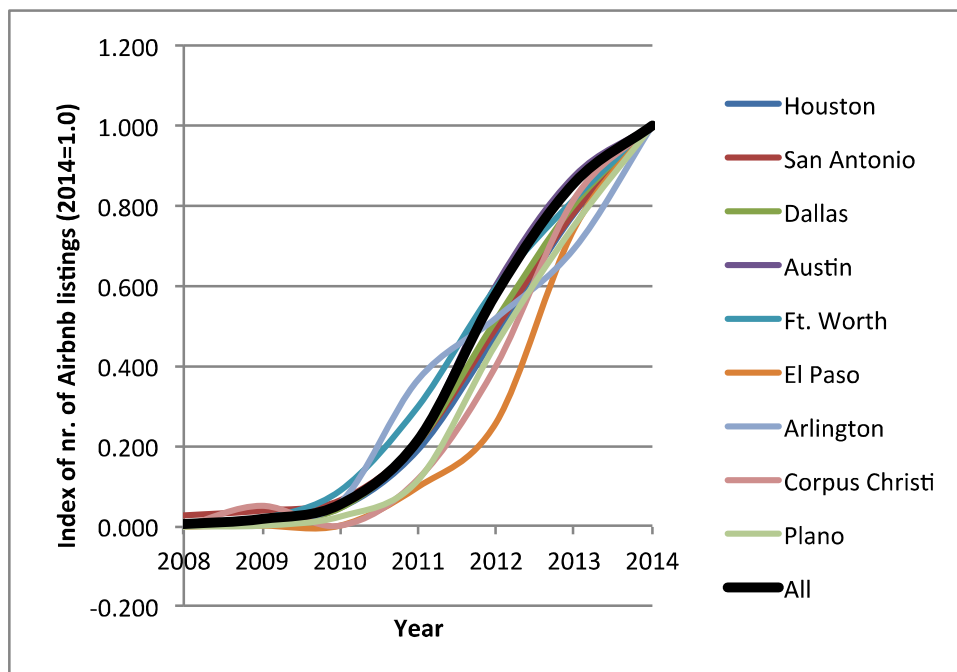
and setting rates. This helps them to become more successful in renting (Villano, 2014). Sundararajan also observes a trend towards expansion of product portfolios within the bigger existing platforms. For instance, Uber getting into delivery services (Villano, 2014).

### 2.2.3. Developments

Airbnb grew 47% between 2013 and 2014 (Stokes et al., 2014). At such growth rates, even from its current small market share of 0.5%, it may reach within one decade a share of 14%, and would cover half the accommodation sector in just 15 years. Whilst it is very unlikely such growth rates will be maintained, the next two decades may see significant changes in the tourism sector.

A clear example of the fast growth, after a slow start, of the sharing economy in tourism is shown in Figure 3. Also, Figure 3 shows the overall trend seems to have reached its maximum growth already and is flattening out, apparently following a conventional S-curve growth path. Based on data in Zervas et al. (2014), the overall share of the population offering Airbnb accommodation for nine US cities (one was removed as it had only 2 listings in 2014) is 0.13%. In terms of the number of homes on offer this is some two to three times higher assuming the average household to be 2-3 persons. The difference between the cities is rather large: most are in the region of 0.00% to 0.04%, but Austin is much higher at 1.02%, or up to 3% of all homes listed by Airbnb. Another interesting observation from the graph is that it is beginning to form an S-curve, after just 6.5 years, suggesting that growth is already falling in some areas. This implies that Airbnb will generally be limited to less than 1-2% of all homes and exceptionally to 5%. That would clearly set a limit to the overall size of the sharing economy market, which may to some extent make it less 'threatening' to established accommodation providers.

**Figure 3: Growth of Airbnb listings in nine Texan cities**



Source: based on data from Zervas et al. (2014: Table 1)

Funding for sharing economy start-ups is also clearly increasing, from \$60 million in 2009 to \$958 million in 2014 (Tracxn.com, 2015: 4). Hawksworth and Vaughan (2015) expect the 2013 revenues in the sharing economy of \$15 billion globally, from the overall \$240 billion rental sector, to increase to \$335 billion in 2025, equalling the size of the

conventional rental sector. In addition to increasing economic activity, it is likely to significantly change consumption patterns (Zervas et al., 2014). Such developments seem a far cry from the original ethos advocated by the founders of Couchsurfing (Germann Molz, 2013).

#### **2.2.4. Issues with the sharing economy development**

The fast growth of the sharing economy causes stress in the ownership-based economy. Some examples are;

- New York hotels lost one million guest-nights due to Airbnb's guests staying in New York between mid-2012 and mid-2013 (Stokes et al., 2014).
- Easy short-term rental opportunities impact on long-term residential house rents because nightly rates exceed monthly rentals (Malhotra and Van Alstyne, 2014).
- The sharing economy is not just incremental to the economy, as initially proposed by its advocates, but is rapidly replacing parts of the conventional economy (Zervas et al., 2014).

Furthermore, there are issues with taxation, safety, environmental impact, labour and equity in competition. These are further discussed in sections 3.3 and 4.2.

### **2.3. Drivers**

Opinions about drivers of the sharing economy in the literature are diverse. For instance, Market Revolution (2013) sees the 2008 financial crisis as one of the main drivers for the development, supported by Schor (2014) who notes that "they are being introduced during a period of high unemployment and rapid labour market restructuring" (Schor, 2014: 9). Other commonly mentioned drivers are ICT and technological innovation, sustainability concerns, social change and economic realities (Botsman, 2013b, Market Revolution, 2013, Sundararajan, 2014). Rifkin (2014) adds a purely economic reason: the phenomenon of 'near zero marginal cost'. He illustrates this by the Airbnb example. Adding an additional room to the list has, for Airbnb, almost no marginal cost, while adding a room to a traditional hotel chain does have high marginal cost. However, Airbnb does not take responsibility for the cost of physically adding a room, which is taken by the provider of the room. The idealistic visions behind early sharing platforms were also driven by "a resistance to capitalist modes of tourism and hospitality and the impersonal relations they represent" (Germann Molz, 2013: 224).

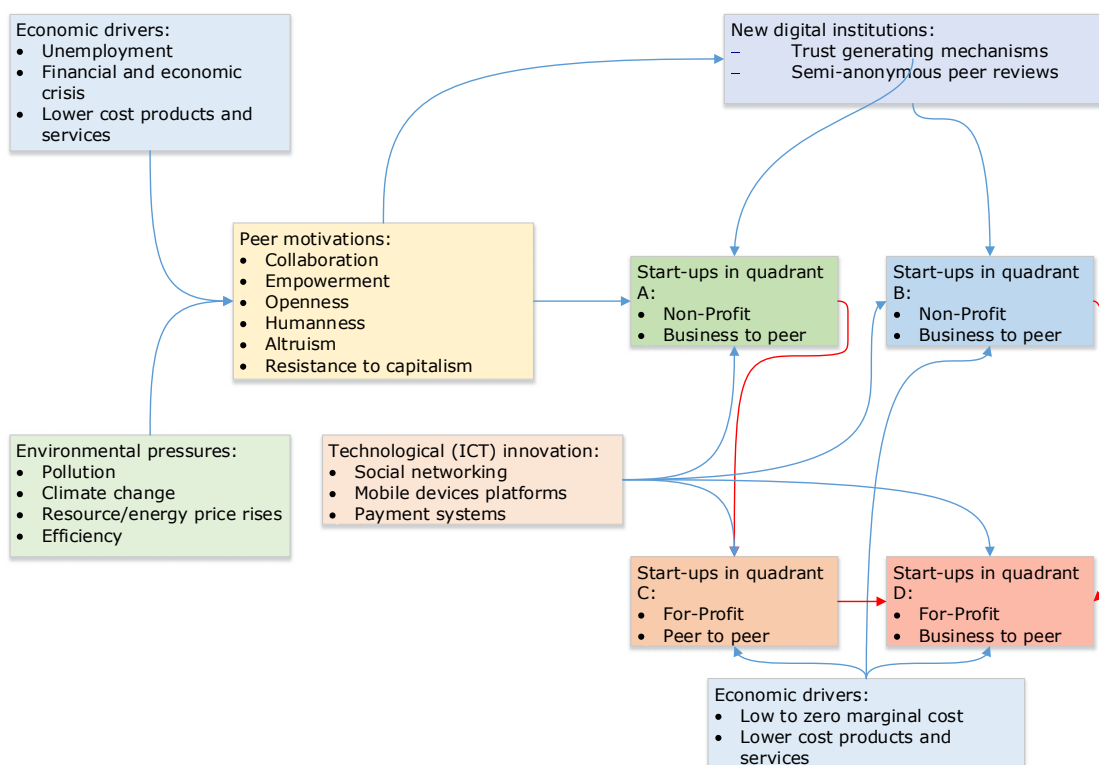
In summary the following drivers were found (Botsman, 2013b, Market Revolution, 2013, Sundararajan, 2014, Germann Molz, 2013, Rifkin, 2014, Schor, 2014, Belk, 2014):

- Technological (ICT) innovation:
  - Social networking
  - Mobile devices platforms
  - Payment systems
- Peer motivations:
  - Collaboration
  - Empowerment
  - Openness
  - Humanness
  - Resistance to capitalism

- Altruism
- Economic drivers:
  - Unemployment
  - Financial and economic crisis
  - Low to zero marginal cost
  - Lower cost products and services
- Environmental pressures:
  - Pollution
  - Climate change
  - Resource/energy scarcity and price rises
  - Efficiency
- New digital institutions:
  - Trust generating mechanisms
  - Semi-anonymous peer reviews

The personal motivation to improve the world cited by Belk (2014), Schor (2014) seemed to drive the initial sharing economy idea (those in Quadrant A, non-profit/peer-to-peer of Figure 1), whilst the sharing 'industry' is driven more economic motives. Figure 4 provides a relational model for the drivers within the four quadrants of the sharing economy from Figure 1.

**Figure 4: Relational diagram of drivers for the sharing economy**



**Source:** Authors

Thus, the sharing economy started from idealistic principles of reducing resource use, environmental burden and resistance to hard capitalism and the ownership-based economy

(the peer motivations), which in themselves are at least partially triggered by the economic (crisis) and external environmental factors. These first idealistic visions also spurred new digital institutions that, combined with technological innovation and the economic drivers, contributed to all types of sharing enterprises. The non-profit/peer-to-peer and non-profit/business-to-peer types tended to create high value and fast growth, eventually transforming them into for-profit businesses. The red arrows in Figure 4 show that this, in the end, will drive platforms and sharing economy systems towards the for-profit/business to peer quadrant and thus to the edge of what the sharing economy is. The “pure” non-profit sharing economy will never really grow, but can be an important initiator/innovator for the conventional economy. Furthermore, this process will change the way people look at and value ownership.

## 2.4. Mechanisms and dynamics

New technologies provide a strong mechanism to unlock the underused value of resources (Botsman, 2013b), such as cars, bicycles and real estate that are frequently idle (Sundararajan, 2014). Furthermore, consumer pain, like higher prices, lower wages and housing problems, will induce the sharing economy (Kapoor, 2014). The mechanism behind innovation has been driven by five key problems for which Botsman (2014) gives following examples:

- Redundancy: The Food Assembly helps to remove intermediaries in the supply chain through online matches between farmers, food producers and consumers.
- Broken trust: Friendsurance creates peer-to-peer networks to insure one another, which creates empowerment and recreates trust.
- Limited access: Coursera offers free courses to anyone, thereby giving access to high level education where university education is inaccessible for many due to the high costs.
- Waste: unused space in homes is made available to peers by Airbnb thus maximizing the efficiency of space use.
- Complexity: TransferWise helps people to send money abroad avoiding currency transfers.

When a new innovative platform is being established it is critical to create a competitive supply. Often this is achieved by ‘subsidising’ the best providers so they shift from their existing channels to the new one (Kapoor, 2014). After this initial phase, the successful platforms will expand because of creating consumption experiences of higher quality and greater variety (Sundararajan, 2014).

Some disadvantages can be identified, however. Imperfect substitutes may replace existing products (Zervas et al., 2014). New platforms may generate demand that did not exist before, thus impairing the idea of better use of existing assets, higher efficiency, and reducing environmental impacts (Zervas et al., 2014). The impacts of the replacement of existing markets by sharing markets has been underestimated by some advocates of the sharing economy by reasoning that, for instance, the peer-to-peer car rental market may cause the users not to buy their own car. On the contrary, car sharing may induce peers offering their car to buy an additional one (Sundararajan, 2014). Unfortunately, such actions negate the main benefit of sharing, saving on the cost of assets, which logically can only exist when users forgo the purchase of a car.

The sharing economy will affect established industries in that they will take market share, put pressure on prices and revenues, and may “facilitate a shift from individual ownership to shared ownership or short-term rental” (Belk, 2014: 1598). This process has been seen

in Texas, where the revenues per room for the lower end of the accommodation sector floundered after Airbnb was introduced (Zervas et al., 2014). Established ownership-based companies may respond in the following ways (Belk, 2014):

1. Flight (switching to other business)
2. Fight (legal action, as with Uber)
3. Creative destruction of old business models by new ones, by old firms like the Mercedes offering car sharing
4. Shift revenues from direct sales to, for instance, advertisements and paid links to commercial sites (e.g. Google search engine).
5. Takeover of the new service by an old company (e.g. Zipcar by Avis)
6. Wait until the newcomers disappear.

The responses 3, 4 and 5 seem the most astute ones economically, while 2 may still be effective, but 1 and 6 will cause replacement of the established economy by the sharing economy.

When a sharing start-up is successful, established larger enterprises in the same market (e.g. accommodation booking sites) or in related markets (e.g. accommodation providers) may try to buy the newcomer. Alternatively the new platform might seek collaboration with larger established firms, as for instance TaskRabbit, an online marketplace for outsourcing errands, collaborates with Pepsi, GE, and Walgreens (Botsman, 2014).

Interestingly, the platforms may feel the lack of regulation, inducing a mechanism to encourage its users to organize and ask for regulation by governments. This has been the case with Airbnb (Schor, 2014). However, the users may develop agendas pushing the company to set minimum prices and wages and avoiding excessive returns to entrepreneurs and venture capitalists (Schor, 2014).

A final important issue not yet explored in the literature is that, although the price is set by the market forces of supply and demand, the share of the revenues taken by producers is decreasing because successful platforms gain significant market share, increasing their market power, as happened with Uber (P-plus, 2015). This presents a number of risks for the tourism industry. First, some costs are lower as some agents in the sharing economy avoid taxes and compliance with regulations. Second, as noted above, platforms tend to consolidate volume because size gives an additional competitive advantage, leading to monopolist behaviour. As a result they take a larger share of the lower price, leaving the producers with low revenues and potentially some market withdrawal. At the same time the conventional tourism sector is left with price pressure, specifically in the lower price segments and those not involved in business markets (Zervas et al., 2014), reducing their margins and sustainability.

The trends identified show a large number of start-ups entering the market, followed by a strong concentration of the market into a small number of successful companies that eventually act in a similar way to 'old economy' enterprises. Whilst the sharing economy will continue to innovate, some of the benefits may be short lived.



### 3. BEST PRACTICE AND LESSONS LEARNED

#### KEY FINDINGS

- The global tourism related sharing economy counts some 491 initiatives. Of these, 11% were labelled as travel, 50% as transport and 39% as leisure.
- Upcoming sectors are food and logistics.
- Though in some respects the sharing economy is successful (innovative, fast growth), it also causes problems mainly because it circumvents existing regulations.
- The following categories of issues have been identified: social discontent, quality and lack of trustworthiness, dependency on and power of the platforms and disruption to existing economies.

#### 3.1. Introduction

This chapter will explore the functioning of the sharing economy within the EU tourism sector. The sharing economy has many relationships with the tourism sector, but is not at all embedded in the conventional tourism sector like destination management organisations or travel agencies and tour operators. A very comprehensive list of initiatives within the sharing economy worldwide can be found at <http://www.collaborativeconsumption.com/directory/> (collaborativeconsumption, 2015); under 'leisure', 'travel' and 'transport' there are 491 unique initiatives listed. These have been self-reported to the source website. Of these, 11% were travel, 50% transport and 39% leisure related (see Annex I). The most important sharing economy projects and initiatives currently available are in some way related to the tourism industry. Several large sharing economy players address accommodation for tourists, for example CouchSurfing, Airbnb, et cetera. The connection with tourism is also clear for initiatives for car sharing, taxi trips, bicycles and other forms of transport. In this chapter, best practices and 'success stories' are listed in 3.2. In 3.3 the threats and lessons learned are described and finally some conclusions are drawn in 3.4.

#### 3.2. Best practice

##### 3.2.1. Introduction

The relationship between the sharing economy and the tourism industry is increasingly intertwined as visitors are given more choices in the way they travel. The 2015 PwC report on the sharing economy (PwC, 2015) identified some megatrends likely to affect tourism over the next 20 years, including people increasing their networks of trusted peers who inform their travel choices, consumers having access to increasing amounts of information in real time, and consumers taking more control and seeking personal interactions. Many sharing economy innovations address these trends directly.

According to PwC, Euromonitor International estimates that in the United States, 10 million overnight stays were sold on the lodging site Airbnb between 2007 and 2012. To put this in context, in 2012 a total of over a billion overnight stays were sold in the U.S. by all types of tourism businesses taken together.

Just how large the sharing economy could grow remains uncertain, but there is some research on its market potential. In an academic research project<sup>7</sup>, more than 84% of the Dutch respondents expressed interest in participating in collaborative consumption of some sort.

What are the 'success stories' of the sharing economy? The larger organisations have been able to reach more people, while offering lower cost options for customers and ways to make (additional) money for the providers. In a certain way, one may assume these organisations have led to a more efficient use of resources, although this cannot be proven. The organisations that are able to build communities seem to be primarily non-profit, and rather small and less well-known. The larger platforms are therefore seen as the success stories. What these platforms may have in common is:

- A wide range of options
- Easy accessible information
- Direct interaction channels for sellers
- Low transaction costs due to ICT
- Global reach due to the Internet
- Trust through social media identity verification and online reviews
- Low operating risks for the peer-to-peer platforms as ownership remains with the providers. Therefore these platforms are intermediaries for freelancers only.

**Table 2: Some key examples of hospitality and accommodation sharing platforms**

Name	Listings (10 <sup>^3</sup> )	Origin	Year	Investment in 10 <sup>^6</sup> \$	Available	Quadrant (fig 1)	Note
Airbnb	1000	USA	2008	801.0	World	C	
Wimdu	400	D	2011	90.0	World	C	
Homeaway	1000	USA	2005	496.0	World	C	
Housetrip	330	CH/UK	2009	59.7	World	C	
Onefinestay	2	UK	2009	15.9	London, Paris, NY, LA	C	<b>Offers extra services</b>
9flats	100	D	2010	10.0	World	C	<b>Accepts bitcoins</b>
Waytostay		E/NL	2004		Europe	C	<b>Offers extra services</b>
Couchsurfing		USA	2003	22.6	World	C	<b>Became for-profit in 2011</b>
Tripping	2500	USA	2009	11.0	World	D	<b>Search engine, includes most of the above</b>

Source: (Tracxn.com, 2015)

<sup>7</sup> Van de Blind, Pieter (2013), The consumer potential of Collaborative Consumption; Utrecht University, The Netherlands.

The platforms in the sharing economy can be categorized along two criteria. Firstly, whether the platforms coordinating the transactions are non-profit or for-profit and secondly, whether the providers (owners of the property) are peers or businesses (Schor, 2014). Below, a short (non-exhaustive) overview is given of the main enterprises operating in the fields of hospitality in 2015.

### 3.2.2. Hospitality

#### AIRBNB

Airbnb works like any holiday booking site: prospective travellers go online, select the dates they wish to travel and pick from a list of options.

But there's one major difference – the properties on offer are not professionally run hotels or apartments. They are flats and houses of ordinary people looking to make some extra money. Would-be hosts can register on the site for free, set a price per night for their accommodation and upload pictures of what is on offer. They can even set house rules. Some ask those booking to send a request so that they can find out more about who they could be letting their home to, while others accept instant booking.

Both guests and hosts write reviews about each other, which are often displayed on the property's listing page. Typically a stay in an Airbnb property is thought to be cheaper than one in a traditional hotel. Airbnb averages 425,000 guests per night, nearly 22% more than Hilton worldwide.

Link: [www.airbnb.com](http://www.airbnb.com).

**Source:** [www.airbnb.com](http://www.airbnb.com)

Most sharing economy examples in hospitality concern platforms that offer rooms, apartments or houses. These platforms have to be very competitive to be a worldwide market leader. Differentiation is limited, and in fact the same listing (e.g. a specific room, apartment, et cetera) can be found on multiple platforms. It is therefore difficult to estimate the true number of listings in any one location. Investments in the more successful organisations are large, as can be seen in Table 2.

In terms of the appeal of the sharing economy in hospitality, a “more unique experience” is second only to better pricing. Customers are increasingly looking for local authenticity in their travels, and sites like Airbnb and EatWith are delivering it. They are introducing high customization and local flavour, delivering micro experiences. Having that local flavour is something that is very difficult for any major brand to match, posing a big challenge for major brands to deal with<sup>8</sup>.

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<sup>8</sup> "The Sharing Economy", Consumer Intelligence Series, [PWW.com/CISsharing](http://PWW.com/CISsharing)

**Table 3: Some key examples of transport and logistics sharing economy platforms**

Name	Note	Origin	Year	Available	Quadrant (Fig 1)	Investment million US\$
Uber	Ride sharing/Taxi service	USA	2009	Worldwide	D	<b>2,800.0</b>
Lyft	Ride sharing	USA	2013	USA, soon international	C	<b>333.0</b>
Blablacar	Ride sharing	France	2004	Europe	C	<b>110.0</b>
Carpooling	Ride Sharing	Germany	2001	In 40 countries	C	<b>10.0</b>
JoinUpTaxi	Ride Sharing	Spain	2012	Spain	C	
Travelercar	Rent out your car instead of parking it at the airport	France	2012	France	C	<b>1.0</b>
Drivy	Car rental	France	2011	France	C	<b>11.0</b>
Snappcar	Car rental	Netherlands	2011	Netherlands	C	
Boatbound	Boat rental	USA	2012	USA: soon international	C	<b>1.8</b>
Spinlister	Bike rental	USA	2011	USA	C	<b>2.0</b>
Zipcar	Car sharing (part of Avis)	USA	2000	USA and Europe	D	<b>?</b>
BlackJet	Planesharing	USA		USA	C	<b>3.1</b>

Source: (Tracxn.com, 2015)

### 3.2.3. Transport & logistics

#### SNAPPCAR

SnappCar offers an online marketplace for car owners and drivers, enabling peer-to-peer car rental in the Netherlands. This online community connects car owners looking for extra income and drivers looking for a wide range of vehicles and a low-medium budget option. Also it offers full insurance and roadside assistance to protect and serve both owners and hirers. Verification process is conducted for both sides before a transaction is made.  
Link: [www.snappcar.nl](http://www.snappcar.nl).

Source: (Tracxn.com, 2015)

The sharing economy organizations in transport have a more varied offer. For instance, sharing cars owned by a company (Zipcar), sharing cars/boats/bikes/planes on a peer-to-

peer basis, or renting a car that would otherwise have been parked at an airport. Table 3 gives an overview of the key platforms.

### **3.2.4. Other, including B2B (Business to Business) sharing cases**

#### **COOKENING**

Cookening is a platform originally from Paris, but now offered in many places in the world that allows users to connect with people from different cultures by attending or hosting home-cooked meals. The start-up provides travellers with an opportunity to experience authentic, local cuisine in the city they are visiting, and for the hosts to meet new people. Cookening charges a commission of 16.7% per meal. The company started in France and has since expanded to over 30 countries.

Link: [www.cookening.com](http://www.cookening.com).

**Source:** (Tracxn.com, 2015)

There are many other organisations, both peer-to-peer and business-to-peer in other industries. For example, there are platforms to share parking spaces, deliver goods, share food, rent out personal goods, office space, 3D printers, etc. The most mature and highest funded industries are in accommodation and transport. Maximum growth is in private spaces, personal goods and business equipment. Upcoming are food and logistics (Tracxn.com, 2015).

### **3.3. Threats and lessons learned**

In recent months, many newspaper articles and television documentaries have reported some important disadvantages of the hospitality and transport platforms. These can be summarized as in the following sectors.

#### **3.3.1. Social discontent**

The strong growth of Airbnb and similar listings are especially affecting popular city centres. In certain areas, for example in the beach side area of Barceloneta in Barcelona, the density is so high that the whole neighbourhood changes. Locals do not feel at home, shop owners adjust their offer to tourists, while shops that cater for inhabitants disappear. Also, many tourists do not 'behave like locals', but instead walk around in beach clothes or stark naked in the streets, have parties on week nights and live noisily with large groups in small apartments (Couzens, 2014).

The societal discontent is also noticeable in many other cities. Increasingly governments faced with these problems are introducing new legislation or regulations, which differ between cities and/or countries. In the USA, where the developments seem to be ahead of Europe, similar problems are being discussed: "Airbnb has struck deals with individual cities such as San Francisco and San Jose to collect taxes; Los Angeles is exploring its own agreement with the company" (Mason, 2015).

Another, similar problem was caused by Uber, or UberPOP, that has led to multiple demonstrations by existing taxi drivers and even assaults on the Uber drivers. Existing taxi drivers planned large demonstrations in several large European cities such as London, Madrid, Paris and Berlin (Fleisher, 2014). Even though there are laws against these services, they prove difficult to enforce. Challenges may also be caused by public opinion, which is not in favour of the current taxi system with high prices and aggressive drivers.

### **3.3.2. Quality of services and lack of trustworthiness**

The Dutch newspaper, *Het Parool*, dedicated a whole page on the bedbugs in New York that were noticeably prevalent in Airbnb apartments, as these owners might not have the funds to have these removed, nor the will to do so. "A new profile is made easily as soon as someone complains on the site" (*Het Parool*, 2015). This article questioned the trustworthiness of reviews.

In Europe, it is Uber and Airbnb that have triggered concerns within the conventional tourism sector. The European Commission received complaints from Uber about some member states banning their operations (Markakis, 2015). These complaints are being investigated; at the same time EU Transport Commissioner Violeta Bulc wrote to the European Parliament in February 2015 that a study about the impact of Uber on the European taxi market will "provide the necessary background for the Commission to decide on the need for – and possible character of – any further action at EU level" (Markakis, 2015).

### **3.3.3. Dependency on platforms**

One central area of debate relates to whether the sharing economy is simply bringing more wage-earning opportunities to more people, or whether its net effect is the displacement of traditionally secure jobs and the creation of a land of part-time, low-paid work.

Some sharing platforms have already resulted in groups of vulnerable people who are dependent on income gained through these platforms. When Uber in the USA decided to lower their prices by 20% to undercut competition from Lyft, many drivers demonstrated as they were already working for a very low wage and would struggle to earn a living (Hagen and Wiering, 2014). Although one might argue that it is the freelancer's own responsibility to decide whether to work for platforms such as Uber, in reality these individuals have few alternatives. Traditional taxi companies who take responsibility for their employees are now almost bankrupt as a result of Uber. What initially seemed to be a development to the advantage of everyone, now appears to turn against the providers of the service who carry all responsibility, while income is decreasing with increasing competition. There is little surplus profit to provide for new investment, maintenance or pensions (Zandvliet, 2015).

### **3.3.4. Power of the platforms**

As the identity of the guests or users is often verified by their Facebook and LinkedIn profiles, it forces people who want to use the sharing economy to become and remain active on these sites. Of course, many people resist, as highlighted by a recently published article titled "I didn't have enough Facebook friends to prove to Airbnb I was real" (*The Guardian*, 2014). In practice Facebook and LinkedIn are important 'owners' of people's digital passports and personal information. Given that these companies are commercial organisations, it might be questioned whether their interests serve the privacy and safety of their users.

### **3.3.5. Disrupting existing economies**

A study of Airbnb in Texas found that hotels had lowered prices because of increased competition. This was particularly the case for independent hotels, lower-end hotels, and hotels that did not cater to business travellers. Whilst this has benefitted travellers in the short-term, it has reduced hotel revenues (Zervas et al., 2014: 20). In the longer term, some hotels will cease trading, leading to higher unemployment, a loss of quality accommodation, and reduced competition.

The European Sharing Economy Coalition proudly lists the changes the sharing economy has fostered (in hospitality, transport, banking, retail, education, food, etc.) and states that “the Sharing Economy is finally raising its status among EU consumers and drawing the attention of policy makers and the traditional industry that has built businesses on continuous appetite for ownership” (Euro Freelancers, 2015). One might wonder what in fact is beneficial about these changes. Potentially these changes could mean a loss of employment, social security and equality, while proponents of the sharing economy just claim employment, social security and equality are to be *advantages* of the sharing economy.

### 3.3.6. Effects on labour markets

The sharing economy is mounting serious challenges to traditional labour markets. For instance, in France<sup>9</sup> the sharing platforms including Uber, Airbnb and the French ride-sharing company BlaBlaCar, is taking on a century of accumulated workplace rights, a 3,809-page labour code and top-notch job security for a privileged population of “insiders”. The continued growth of Uber, whose higher-end UberX service continues to function, as well as other sharing economy firms, is remarkable.

## 3.4. Conclusions

The sharing economy has led to many new organisations that apparently have been able to address unfulfilled needs of consumers. Several of these platforms have grown into multinational companies that employ many ‘freelancers’ – the original peers. What appears initially to be a friendly and efficient way to create value from underused assets may have become a way to make easy money for a limited number of platform owners. This provides an insecure income that is subject to increasing competition. As a result there may not be funds reserved for maintenance or future investment. Consumers are given increased options, but are not assured of quality, as there is no control and reviews may not be trustworthy. Last but not least, they are required to give personal information to platforms, who may use it for other purposes.

Key considerations:

- The potential for the sharing economy to impact tourism is considerable without proper regulation enforcement. The better-prepared industry and government are, the better the tourism industry will be at managing and sustaining their brands.
- Businesses must focus on providing quality and professional experiences that will further separate them from individuals providing unprofessional products through sharing companies.
- Businesses must observe how technology is shifting the way people choose to travel, and socially and commercially interact with one another. This will offer insights into how businesses need to evolve to keep up with the changing tourism economy landscape.
- The way sharing companies are utilising technology can in fact be adapted to regulated tourism businesses while still abiding by the law. This includes the use of apps for bookings and employing their innovative marketing techniques.

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<sup>9</sup> <http://www.politico.eu/article/uber-conquers-france-airbnb-sharing-economy-unions-hollande-socialists-clash/>





## 4. SHARING ECONOMY AND EU TOURISM POLICY

### KEY FINDINGS

- The original ideal of a fully free sharing economy is not desirable from a governance perspective.
- The rather disruptive nature of the peer-to-peer economy and failure to collaborate with local governments may threaten the longevity of these business models.
- Current legislation is dedicated to the ownership-based economy and less suited to govern the sharing economy.
- Anticipatory governance may regulate the sharing economy balancing between enhancing its innovative power and avoiding its societal and economic disadvantages.
- Governments should consider applying the principles of sharing to their governance.
- The main issues with the sharing economy are in taxes, licensing and certification, safety, liability, trust, labour and competitive equity, types of legal form, spatial planning, and applying sharing concepts to governments.
- A general EU policy on how to govern the sharing economy does not exist.
- Main strategies for governance are: i-teams, EU guidelines for DMOs, maintain a best and bad practice database.
- Thirteen relationships between the main sharing economy policy issues and tourism policy challenges have been identified of which seven are negative, four positive and two mixed.

### 4.1. Introduction

#### 4.1.1. The free sharing economy

The sharing economy is a fact. It is likely to increase in importance. It impacts the tourism industry as many sharing economy platforms are tourism related. The sharing economy has advantages and disadvantages to global competitiveness, seasonality, sustainability, accessibility, some of the main goals of EU tourism policy. The pioneers of the sharing economy did so from a very strong idea of freedom. Free exchange and access to music and movies led to pirate websites violating copyrights (Belk, 2014). Some advocates of the sharing economy are adamantly against any regulation of the sharing economy, reasoning that sharing is synonymous with freedom (Gobble, 2015). For instance, Thierer (2014: 87) writes "it should be clear now that the case for permissionless innovation is synonymous with the case for human freedom more generally". In this way Thierer warns about the loss caused by general precautionary principle-based policies. He believes in a symbiotic relationship between freedom and progress. Absolute freedom does not exist in a community as there are conflicts of interest between different members. For instance, freedom should be given unless "a compelling case can be made that a new invention will bring serious harm to society" (Gobble, 2015: 62). Furthermore, Gobble (2015: 63) cites Forbes blogger Larry Downes to argue that "innovation and regulation simply don't work together. Regulated industries (...) operate outside market-based systems. Competition is prohibited, even criminalized." Interestingly, the above is rather a neoliberal capitalism stance, whereas we have seen that sharing pioneers were partly motivated by anti-capitalism feelings (Germann Molz, 2013). Furthermore, the idea that strong regulation will

always lead to the demise of innovation (Thierer, 2014) is in stark contrast with the strong innovative capacity of both the civil and military aviation industry (Mowery and Rosenberg, 1981).

These initial freedom-based ideas and other potential problems with the sharing economy posing challenges for policy and regulation (Stokes et al., 2014). The totally unregulated position of the drivers with respect to wages and labour rights, has led some to identify schemes such as Uber to be a new form of slavery (P-plus, 2015).

**Box 1: The governance issue of the digital sharing of music and movies**

**THE NAPSTER CASE**

**And how legal action failed to provide a solution**

"Starting with Napster, free sharing of digital music and films began to flow between strangers who would download and often upload material via peer-to-peer (P2P) file sharing. This caused the music and film industries to lose substantial sales of CDs and DVDs and provoked them to engage in a series of actions attempting to enforce their intellectual property rights (IPR) through means such as lawsuits, incorporating digital rights management (DRM) software into their products to curb duplication, and putting up fake corrupt files online to fowl download attempts. The resulting "war on sharing" has proved largely futile. Even though Napster was shut down (and later reinstated in legal form as a digital music store), many alternative sites sprung up in its place, including BitTorrent protocol sites like The Pirate Bay, Grokster, Gnutella, and Freenet."

**Source:** (Belk, 2014: 1596)

The music industry example demonstrates the need to think about policies dedicated to the sharing economy.

**4.1.2. Failing legislation**

The strong development of for-profit platforms in tourism causes trouble in the form of legal and regulatory challenges and conflict with established (tourism) enterprises. For instance, Airbnb has been fought in court and through local legislation in New York (Dickerson, 2015). Because Uber is not required to undertake all ride requests, as other taxi companies are, a German court banned Uber's services in Germany. (Malhotra and Van Alstyne, 2014). Actually, Uber is entering the heavily permission-oriented taxi market circumventing this existing regulation (Gobble, 2015). This causes controversy because the new sharing economy businesses operate outside current regulatory frameworks and without governmental permission (Gobble, 2015). In some cases this causes large protests by inhabitants of tourist destinations against the new activities, as in the case of Airbnb in Barceloneta, Barcelona, Spain, because Airbnb was used by investors to build and provide a large volume of unregulated accommodation causing harassment of residents by noisy, drunk, and naked (UK) tourists (Sinkeviciute, 2014).

Many rules governing our economic activities stem from past decades and are ownership-based and not fit to regulate the collaborative economy (Stokes et al., 2014). Sundararajan (2014) observes that current regulatory legislation may impair the growth of the sharing economy because of a mismatch between the new peer-to-peer business models and older legislation with respect to safety and economic externalities. A restructuring of the policy framework will be needed to enable innovation, with delegating more responsibility to the platforms, while at the same time preserving some government

oversight (Sundararajan, 2014). Cohen and Kietzmann (2014) argue that because of the rather disruptive nature of the peer-to-peer economy failure of the platforms to collaborate with local governments threatens the future of these platforms (Cohen and Kietzmann, 2014). A strong case for policies to be developed.

### **4.1.3. Opportunities**

As the sharing economy is increasing in significance (see Section 2.2), the issue is “not whether to bury or build the sharing economy” (Malhotra and Van Alstyne, 2014: 27). At the same time those against are too “bombastic” and those advocating “unrealistic” as the sharing economy’s downsides are well known (Malhotra and Van Alstyne, 2014). Regulation of the market is necessary to avoid unfair advantage of the newcomers over others (Malhotra and Van Alstyne, 2014). Therefore, anticipatory governance is required. Anticipatory governance may help to avoid the sharing economy revolution to become unproductive and turn against itself (Guston, 2008).

Two more opportunities for governmental development are mentioned in the literature. First, there is an opportunity for governments to apply the principles of the collaborative economy, making smarter use of the physical resources, skills, and knowledge available in every city (Stokes et al., 2014). Second, the sharing economy providers and platforms can find ways to collaborate with local governments for the sake of continuity (Cohen and Kietzmann, 2014). The collaboration may help to gain safety and solve environmental issues. Furthermore, governments may start projects around the emerging sharing economy as for instance in Seoul, South Korea. The municipality of Seoul has been an active promoter of the sharing economy in both tourism and other sectors and has provided a local information hub (Stokes et al., 2014). Twenty examples of government i-teams (innovation teams) are given by Puttick et al. (2014). Most of these are concentrated in the USA and in Europe. European examples mentioned are: Nesta Innovation Lab (London), Behavioural Insights Team (London), VINNOVA (Stockholm), Sitra (Helsinki), La 27e Région (Paris), Fonds d’expérimentation pour la jeunesse (Paris), MindLab (Copenhagen) and Barcelona Urban Lab (Barcelona).

The i-teams (innovation teams) examined can be divided into the following four categories (Puttick et al., 2014):

1. Creating solutions to solve specific challenges by developers and innovators and often in collaboration with governments.
2. Engaging citizens, not-for-profits and commercial businesses to make new ideas available to the government through creating i-teams.
3. i-teams offer consultancy and training, helping governments to make their approach to innovations more effective.
4. Enabling policy and systems change with i-teams that are able to handle complex systems and issues and transform them by being open to such transformations and new ideas. These i-teams create the blueprints for change.

## **4.2. Policy issues**

### **4.2.1. Overview issues**

What are the issues that require government regulation or attention from policy makers? The case of Airbnb in New York is illustrative: it fought legislators who argued that the service was essentially an accommodation business and thus should be taxed and regulated

as such (Gobble, 2015). In general, regulation is required for the sake of consumer safety, to avoid market failure and to serve the general good (Sundararajan, 2014: 7).

In the following sections legislation will be discussed with respect to (Stokes et al., 2014: 31, Market Revolution, 2013):

- Taxes: how to tax activities where no money is involved; when does a non-professional activity (e.g. hosting strangers in a residence) become a commercial business subject to tax?
- Licensing and certification: should there be a difference between licensing for safety, environment, quality, protection of consumer's rights, et cetera?
- Safety, liability and trust: who is responsible for damages caused by the consumption of a service or resource? For example, who is responsible where a room is not up to expectation and disappoints the tourist? Is it the provider or the platform?
- Equity (labour, competition): worker rights, wages, fair competition and combating market failure, exclusion of providers and/or consumers.
- Types of legal form: differences in legislation for-profit and non-profit organisations, policy for direct income and facilitating private asset valuations, how to handle non-financial collaborative activities, and difficulties in applying "private ownership era" legislation to sharing economy enterprises.
- Land use, planning and support: certain areas are designated for specific activities and this may become blurred when private homes are also used for non-resident activities as with Airbnb. Also tourism is relevant: idle or underused land is put into productive use through the collaborative economy, such as urban agriculture and community gardens in vacant lots.

Sundararajan (2014) makes a strong case for low government regulation and limited government intervention to a commission that oversees self-regulating organisations (SROs) as was enabled with the 1934 Securities and Exchange Act in the US. Others assume that self-regulation cannot be a better alternative to conventional governance and regulation and that peer review and self-regulation are not good substitutes for appropriate regulation and legislation (Stokes et al., 2014).

#### **4.2.2. Taxes**

Conventional accommodation and taxi services have to pay a number of taxes and fees such as income tax, VAT, tourist taxes and licence fees. The sharing economy entrants avoid these taxes and fees because they are 'selling' privately owned unlicensed assets (Malhotra and Van Alstyne, 2014, Stokes et al., 2014). This disparity between conventional business and sharing economy business creates an unequal playing field (different cost and standards for basically the same service or goods). The situation also reduces the tax income of governments, resulting in higher taxes for the other consumers or businesses. Several examples exist where governments have tried to repair this mismatch. For instance, the city council of Amsterdam requires the payment of income and tourist taxes on sharing economy based home rental (Malhotra and Van Alstyne, 2014). In France, a new law enables residents to rent their premises without further registration or licencing, but also enables local governments to specify additional requirements (Stokes et al., 2014). In the US, Airbnb started the Shared City program in an attempt to address some governance issues, including taxation (Stokes et al., 2014).

### 4.2.3. Licensing and certification

Short-term rental (STR) typically impacts on neighbourhood planning, tourism, and overall housing access. In the UK, the housing ministry suggested that some of the existing legislation is outdated and unworkable and requires updating to make private rentals fairer and more flexible (Stokes et al., 2014), where guest and employee rights, quality, environmentally friendly operations and safety in tourism are guaranteed. Much of the sharing economy is based on trust-generating individual reviews and ratings, but some studies found 16% of such reviews were not genuine. In most cases the reviews were very negative causing certain providers or customers to be removed from the platform and thus from these markets (Malhotra and Van Alstyne, 2014) without any real cause.

The need for an active policy role is clear from the following examples (Malhotra and Van Alstyne, 2014):

- In San Francisco a dispute about 'sharing' free parking space through a mobile app that rewarded users when they vacated a public parking space to someone else. Counsellors issued a cease and desist order to producers of the app.
- In the United States taxis are licensed through so-called medallions. These medallions both regulate taxi services, but also create cartels where medallions offer investment-grade returns to the cities selling them. This causes a large discrepancy between conventional taxi-drivers, having to invest heavily in a medallion and sharing drivers who have not to do so.
- Self-regulation may cause harm to non-members, create market power, and network effects that encourage firms to engage in anticompetitive behaviour. Only with care, these problems can be avoided.

The example of Amsterdam is a clear example of how to start regulation of private homes by requiring hosts not only to pay some taxes, but also to avoid inconvenience for neighbours (Malhotra and Van Alstyne, 2014). On the other hand, these individuals do still not require licenses or inspections of their kitchen hygiene as do major established accommodations (Malhotra and Van Alstyne, 2014).

#### **Box 2: Success Story**

### **LICENSING ISSUES: UBERPOP IN FRANCE**

#### **Main problems with platforms like Uber are the licenses**

Many tourism facilities are regulated through licenses. France has suspended UberPOP services because it uses unlicensed drivers who do not have insurance for driving with paying passengers. UberPOP is fighting these decisions in court and generally pays fines for its drivers. UberPOP counters that the taxi lobby has a lot of power, causing governments to fail again and again when trying to modernise the sector. However, the UberPOP service has not been without problems, for example rates increased steeply in Sydney when an armed man held hostages in a cafe causing a sharp increase in demand in the area. UberPOP explained this was due to their demand driven automatic pricing algorithm. In this case UberPOP quickly capped the price for the area, avoiding passengers to have to pay up to four times the normal rates.

France is planning to have a new law setting minimum requirements for licensing, professional training and insurance, but taxi driver organisations suggest these requirements still fall way below the requirements for their sector.

After days of very violent protest by taxi drivers blocking roads, railway stations and burning several UberPOP cars, France decided on 26<sup>th</sup> of June 2015 to ban all UberPOP drivers from the country. The fury of the taxi drivers is fuelled mainly by the fact they had to pay up to €100,000 for their licenses, which are becoming worthless due to the introduction of UberPOP.

**Source:** (Jolly and Scott, 2014)

#### **4.2.4. Safety, liability and trust**

Safety and liability are clear problems as shown by the example in box 3. But also trust in the quality of the service or product delivered appears to be an issue. This trust mainly depends on the public peer review systems offered on the platforms (Malhotra and Van Alstyne, 2014). To guarantee the validity of reviews, an independent agency might help to prevent positive or unfairly negative comments (Malhotra and Van Alstyne, 2014). Such agencies typically should reside under government control either at the national or local (destination) level.

In an attempt to nurture the evolution of peer-to-peer platforms, the US federal legislation developed “safe harbours,” for instance under the Digital Millennium Copyright Act (Sundararajan, 2014). But such safe harbours are insufficient to solve regulatory barriers to peer-to-peer business. A major issue is that a platform cannot exclude illegal providers unless there are clear and accepted definitions about what is legal trade (Sundararajan, 2014). From the perspective of the consumer, the platform is often the point of contact for sales and should also be the point of contact for complaints. There is room for dedicated legislation, or at least guidelines for local or national legislation, at the EU level.

#### **Box 3: Text box Success Story**

##### **LIABILITY ISSUES**

##### **Who pays compensation in case of a traffic accident with an Uber ride?**

“Last New Year’s Eve, an off-duty driver for the ride-sharing service Uber killed a pedestrian while hunting for fares. Since the driver was a “contractor,” the sharing service would not compensate the victim’s family. The contract stipulates that the service is a matching platform and “the company does not provide transportation services, and ... has no liability for services ... provided by third parties.” Who then will bear the costs of such disasters?” It looks like these new business models enjoy profits while offloading risk to others.

**Source:** (Malhotra and Van Alstyne, 2014: 26)

#### **4.2.5. Equity (labour, competition)**

Platforms within the sharing industry may cause issues of class, gender and racial biases as they may limit trade based on 'wrong' characteristics of the member (Schor, 2014). Schor (2014). Also, sharing can produce extreme revenues based on an asset not even owned (Malhotra and Van Alstyne, 2014). An example of this is: "Consider the extreme case of a Netflix subscriber who pays \$20 per month, rents three DVDs from Netflix, and then rents each for \$1 per night to other individuals. The subscriber makes \$90 (1×3×30) each month while paying substantially less for an asset he or she never owns" (Malhotra and Van Alstyne, 2014: 26). One may doubt the legality of this kind of transactions, but at the same time, there is no specific legislation controlling this kind of behaviour.

There is an issue concerning the provision of labour services as micro-outsourcing only pays for the task at hand, the marginal costs, thus ignoring overhead costs for acquiring new skills, health care and retirement (Malhotra and Van Alstyne, 2014). In this way marginal costs approach zero and with labour becoming for free the freedom will be hollow (Malhotra and Van Alstyne, 2014). The totally unregulated position of drivers with respect to wages and labour rights has even led some to identify schemes as Uber to be a new form of slavery (European Commission, 2010).

#### **4.2.6. Types of legal form**

There are issues with the definition of the legal form of sharing economy platforms. When is a platform fully non-profit or for-profit? How is direct income defined? There is disagreement on what policies should be defined for direct income and facilitating private asset valuations, how to handle non-financial collaborative activities, and how to apply "private ownership era" legislation to sharing economy enterprises (Stokes et al., 2014). For instance, much of the content provided is non-compensated, which means that for-profit platforms get value for nothing (Belk, 2014). Additional difficulties may arise with intermediate forms of for-profit and non-profit platforms as in the case of Couchsurfing, that converted into a B Corp, or benefit corporation (Germann Molz, 2013).

#### **4.2.7. Land use, planning and support**

Other issues may arise from the evolving sharing economy. For example, the impact on long-term rental capacity of home owners switching to short-term rentals because the accumulated nightly fees for short term far exceed the monthly rates for long term (Malhotra and Van Alstyne, 2014). This of course may benefit higher income home-owners at the cost of low income individuals (Malhotra and Van Alstyne, 2014). While spatial planning will aim to avoid conflict between residents and tourists, the sharing economy may introduce tourists into predominantly residential areas changing, their character.

### **4.3. Existing European policy**

#### **4.3.1. The emerging sharing economy EU policy**

There is currently no EU policy on the sharing economy. More generally, there is a EU code of online rights (European commission, 2012), which covers online consumer rights in terms of equity of access to online services and network communications, and guarantees of privacy while using such services. This code also provides rights and principles when buying goods or services online, and rights and principles for the consumer in case of conflicts. All of these play a role in the sharing economy market, although the code does not directly refer to sharing platforms. This code does not provide new rights, but compiles existing rights in the context of online services and goods.

A recent communication issued by the European Commission, observes that “policy makers have to keep pace with rapid innovation, often of a disruptive nature (such as the rise of the sharing economy)”. In a briefing of the EU, the sharing economy is viewed from the perspective of tourist accommodation providers<sup>10</sup>.

The European Commission has issued a communication dedicated to the development of the ‘Digital Single Market’ (European commission, 2015a). In this communication, the EC observes that the sharing economy is growing and not only offers several opportunities for new jobs and improved efficiency, but also offers challenges and new regulatory questions. These will be tackled in the forthcoming Internal Market Strategy and in the e-commerce framework. Also the Commission will “launch before the end of 2015 a comprehensive assessment of the role of platforms, including in the sharing economy, and of online intermediaries, which will cover issues such as (i) transparency, e.g. in search results (involving paid for links and/or advertisement), (ii) platforms' usage of the information they collect, (iii) relations between platforms and suppliers, (iv) constraints on the ability of individuals and businesses to move from one platform to another, and will analyse, (v) how best to tackle illegal content on the Internet” (European commission, 2015a: 12). The background report to this communication (European commission, 2015b) mentions the sharing economy as one of the potential rapid developments with a disruptive nature.

Because of the lack of current EC communications or reports dedicated to governance of the sharing economy, we feel the recommendations by the EC are worth considering when developing such documents. The following is inspired by the EESC opinion (Hernández Bataller, 2014). The growing economic impact of the sharing economy causes a conceptual shift in labour. Sharing platforms promise to become a major potential source for jobs in the near future. Sharing may provide services that otherwise would not be available, but it also requires analyses on how to regulate these forms of consumption for the rights and responsibilities of all the stakeholders involved. Rulemaking would cover elements such as taxation, safety, liability and consumer protection. The main recommendations are to add further detail to the EU code of online rights specifically related to the sharing economy and to commission in-depth studies into potential barriers to the development of the sharing economy and problems that arise from such a development. Also, it is advisable to develop a database containing experiences and best practices and embed this in an awareness and communication campaign. Finally, we advise harmonising legislation and tackling cross-border issues.

#### **4.3.2. Current EU tourism policy**

In June 2010, the European Commission adopted the Communication, 'Europe, the world's No. 1 tourist destination about Europe as a destination<sup>11</sup>, a new political framework for tourism in Europe' (European Commission, 2010). This communication set out a new strategy and action plan for tourism for the EU and identified four priorities for action:

1. to stimulate competitiveness in the European tourism sector;
2. to promote the development of sustainable, responsible, and high-quality tourism;

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<sup>10</sup> [http://www.europarl.europa.eu/RegData/etudes/BRIE/2015/568345/EPRS\\_BRI\(2015\)568345\\_EN.pdf](http://www.europarl.europa.eu/RegData/etudes/BRIE/2015/568345/EPRS_BRI(2015)568345_EN.pdf)

<sup>11</sup> [Europe, the world's No 1 tourist destination - a new political framework for tourism in Europe - COM\(2010\) 352/final](#). See also EP resolution [P7\\_TA\(2011\)0407](#), adopted (Sept 2011) on the basis of its own-initiative report (the first following the entry into force of the Lisbon Treaty) entitled 'Europe, the world's No 1 tourist destination'. While supporting the 21-point policy strategy presented by the Commission, Parliament wishes to promote a competitive, modern, high-quality and sustainable tourism that is accessible to all, by focusing on Europe's multiculturalism.



3. to consolidate Europe's image as a collection of sustainable, high-quality destinations;
4. to maximise the potential of EU financial policies for developing tourism.

A rolling implementation plan (European Commission, 2013) has been published describing the many projects and actions to be implemented as part of the strategy, in collaboration with public authorities, tourism associations and other public/private tourism stakeholders. To date, the Commission has successfully implemented the majority of the actions set out in the Communication, focusing on the following priorities:

- increasing tourism demand, from within the EU and beyond;
- improving the range of tourism products and services on offer;
- enhancing tourism quality, sustainability, accessibility, skills, and ICT use;
- enhancing the socio-economic knowledge base of the sector;
- promoting Europe as a unique destination;
- mainstreaming tourism in other EU tourism policies.

Very recently Bieńkowska (2015) announced the development of new priorities:

1. Streamline the regulatory and administrative framework at all levels;
2. Target measures to promote the digitalisation of tourism SMEs;
3. Upgrade customer service skills and competences across the tourism sector;
4. Finalise the European Charter for Sustainable and Responsible Tourism;
5. Act to increase tourism in the low and medium seasons, in particular for senior and young tourists;
6. Improve 'intermodality' and transport connectivity;
7. Joint promotion of Europe as a tourist destination, particularly to those from third countries;
8. Address the issue of governance.

Also, the recent EP initiative report (A8-0258/2015) on "New challenges and concepts for the promotion of Tourism in Europe"<sup>12</sup> (adopted in October 2015) focused on the following priorities (I.De Monte, 2015):

- Branding/joint promotion of Europe as a tourism destination
- Pan-European and transnational tourism products
- Quality
- Sustainable and responsible tourism
- Sharing economy
- Digitalisation

The sharing economy was given priority in a motion for the European Parliament<sup>13</sup>:

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<sup>12</sup> See (2014/2241(INI) <http://www.europarl.europa.eu/oeil/popups/summary.do?id=1410083&l=en&t=D>

<sup>13</sup> <http://www.europarl.europa.eu/sides/getDoc.do?type=REPORT&reference=A8-2015-0258&language=EN>

"The European Parliament:

- Welcomes the opportunities brought by the sharing economy for start-ups and innovative companies in the tourism sector; acknowledges the complementarity of these services with other tourism offers as regards their location and the people they target;
- Recalls that the sharing economy, or collaborative consumption, is a new socio-economic model that has taken off thanks to the technological revolution, with the internet connecting people through online platforms on which transactions involving goods and services can be conducted securely and transparently;
- Emphasises that the current legislation is not suited to the sharing economy, and that for this reason local and national governments have started to analyse such online platforms and are trying to regulate their effects, often applying disproportionate measures which are somewhat disparate within the Union; urges the Commission, together with the Member States, to analyse the best possible initiatives to be taken at European, national, regional and local level; recommends that consideration be given to establishing an appropriate regulatory framework within the overarching EU digital single market strategy;
- Stresses that the response to the rise of the 'sharing economy' must first be analysed before regulatory measures are taken; considers, however, that any action on the part of public authorities needs to be proportional and flexible in order to enable a regulatory framework that secures a level playing field for companies, and in particular a supportive positive business environment for SMEs and for innovation in the industry; considers, furthermore, that for the sake of consumer protection the security, safety and health regulations applicable to the traditional tourism sector should also apply to tourism services provided on a commercial basis within the sharing economy;
- Stresses that providers' activities need to be categorised correctly in order to distinguish clearly between ad hoc or permanent sharing and professional business services, to which appropriate regulations should apply;
- Emphasises also that platforms need to be fully accessible and that consumers using such sites must be correctly informed and not misled, and the privacy of their data protected; underlines the importance of a viable and transparent system of reviews, and of ensuring that consumers are not penalised by service providers for leaving negative reviews;
- Emphasises that the technology companies acting as intermediaries need to inform providers of their obligations, particularly as regards the protection of consumer rights, and to provide reliable and accessible information about all fees and hidden costs associated with conducting business, and about how to remain fully compliant with local laws, particularly as regards tax law and the observance of norms pertaining to consumer safety and the working conditions of those providing tourism services;
- calls on the Commission to assess the economic and social impact of the sharing economy and its implications for the tourism industry, consumers, technology companies and public authorities, and to report back to Parliament on the outcome of the initiatives it has undertaken so far".

The main challenges for the European tourism industry are identified as (European Commission, 2015c):

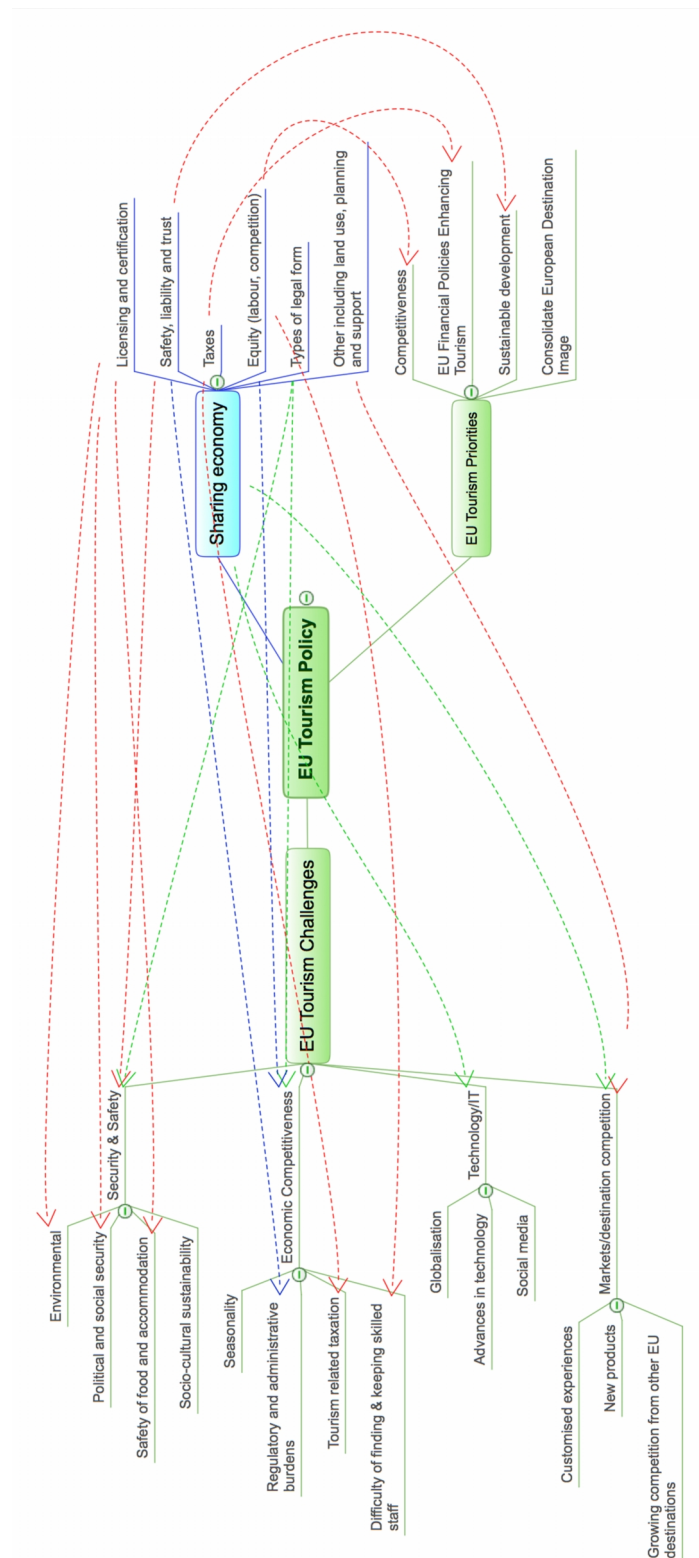
1. **Security and safety**, political, social and environmental security; safety of food and accommodation; and socio-cultural sustainability threats;
2. **Economic competitiveness**: seasonality, regulatory and administrative burdens; tourism related taxation; difficulty of finding and keeping skilled staff;
3. **Technological**: keeping up to date with IT developments caused by the globalisation of information and advances in technology (IT tools for booking holidays, social media providing advice on tourism services, etc.);
4. **Markets and competition**: growing demand for customised experiences, new products, growing competition from other EU destinations.

The following section discusses the implications of the sharing economy for these priorities and challenges and concludes with the challenges that the sharing economy presents for the tourism sector.

#### **4.4. A tourism policy directed at sharing economy**

EU tourism policy should take advantage of the opportunities of the sharing economy. At the same time the challenges this poses for the regular tourism industry and its entrepreneurs and workers, should not be ignored. Figure 5 shows the relationships between the main policy issues of the sharing economy and the challenges of the tourism industry. Most are negative (shown in red), with slightly fewer positive (in green) and just a small number with varying impacts (in blue). The opportunities and challenges for the development of EU tourism and policy based on the relationships identified in Figure 5 will be discussed in the following sections, beginning with some global connections between all sharing economy issues, technology and innovation in section 4.4.1.

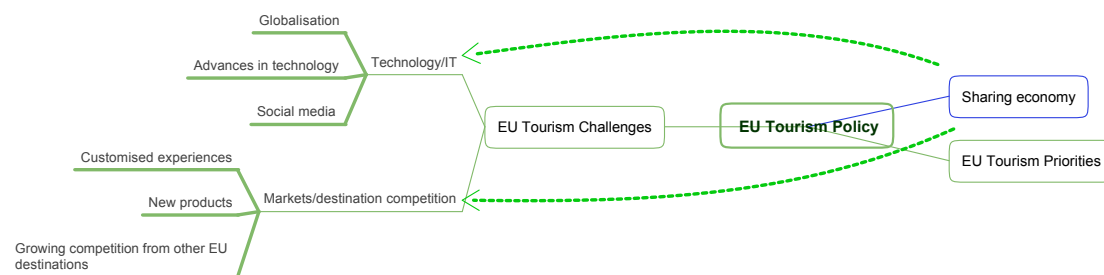
**Figure 5: Overview of relationships between the sharing economy policy issues and EU tourism policy priorities and challenges<sup>14</sup>**



Source: Authors

<sup>14</sup> Red lines show relationships which are challenging, green ones are promising and blue ones are both challenging and promising. This figure is based on the current priorities, not those announced in May 2015 by the commissioner Bieńkowska.

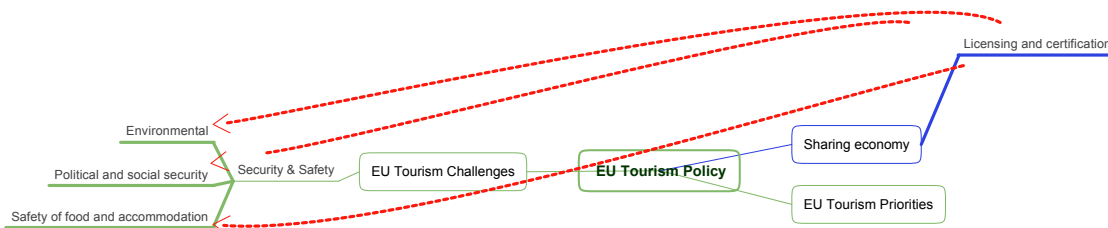
#### 4.4.1. Sharing economy, technology and innovation



The whole **Sharing Economy** has a direct relationship with the tourism challenges **Technology/IT** and **Markets/destination competition**. These relationships are positive in that the sharing economy platforms are highly innovative and not only create additional value from private assets and capabilities, but also do this in a high-tech and innovative way. The effects are certainly positive in adding new or more advanced products to the tourism economy. For example, conventional accommodation struggles to create a local atmosphere of staying with locals, while Airbnb naturally provides such an experience. Furthermore, the way platforms generate and explore customer content, a typical part of the sharing economy, is supported by technology. So the tourism challenge issues of **Markets/destination competition**, **Customised Experiences**, **New Products** and **Growing Competition from other EU Destinations** are all positively affected by the sharing economy. Customised experiences in direct contact with local, non-professional, private persons for accommodation, but also for car or bike rental and exchange of route or things-to-do information create customized experiences. New products are evident as a stay in an Airbnb room certainly differs from one in a regular hotel. The challenge of growing competition between EU destinations is more of a negative issue as it will increase. The way destinations handle the opportunities and threats of the sharing economy does change the relative competition. To prevent unmanageable changes in demand for destinations, it seems wise for EU policy makers to create the means for all destinations to take the benefits of the sharing economy.

Further **Technology/IT** – *Globalisation, Advances in Technology and Social Media* – are affected by the sharing economy. Many platforms work globally, enabling global destination competition. The arrival of technology platforms automatically introduces technology and many of these use social media. The use of technology has been an important driver in the tourism sharing economy.

#### 4.4.2. Licensing & Certification



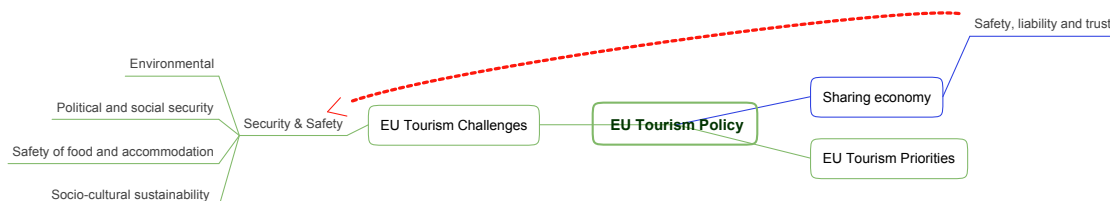
The sharing economy causes issues with **Licensing & Certification**. This relates to EU tourism policy challenges of **Security & Safety** and particularly with respect to the *environment, political and social security and safety of food and accommodation*. The link

to the environment and safety is primarily a negative one as the sharing economy services and products circumvent current policies aiming at eco-labelling destinations and more particularly accommodation (European Commission, 2010, European Commission, 2013). Regulation currently depends on local and national governments and is stimulated by the EC. These regulations do not cover the new accommodation and transport services in the sharing economy (e.g. accommodation offered by Airbnb and taxi drives by Uber). These platforms have their own voluntary regulation systems through peer-review. For instance, badly behaving hosts and guests may be removed from the platform’s databases. However, some may try to circumvent this by creating a new account because generally personal ID’s are not always checked. This may have the following adverse effects for destinations:

1. Low quality private accommodation may reduce the destination’s image and market value.
2. When the sharing economy accommodation represents a larger share of the supply of accommodation in a destination, some potential visitors may be excluded as they are not members of the schemes and platforms offering these rooms.
3. Environmental and safety policies with eco-labelling are hampered by sharing economy accommodation.

Some destinations, like the city of Amsterdam, have created new legislation forcing registration and some minimal requirements for sharing economy accommodation.

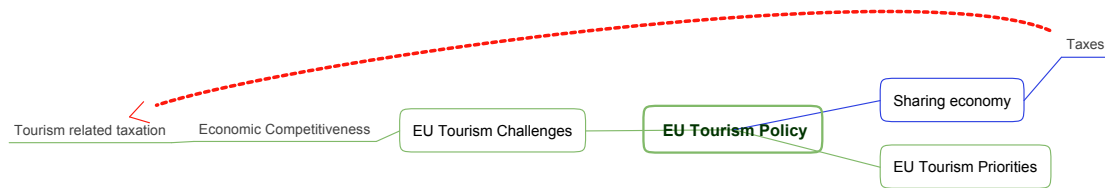
#### 4.4.3. Safety, Liability and Trust



The issues for **Safety, Liability and Trust** are negatively related to all **Security & Safety challenges**, but may both add and reduce the *Regulatory and administrative burdens*. The main issue is how liability for damages due to low quality products and services on one side and to misbehaving guests on the other are distributed between the platform, guest, and host. In the case of transport, for example, safety and health risks are significant, as compulsory private-use insurance generally does not cover accidents during commercial activities.

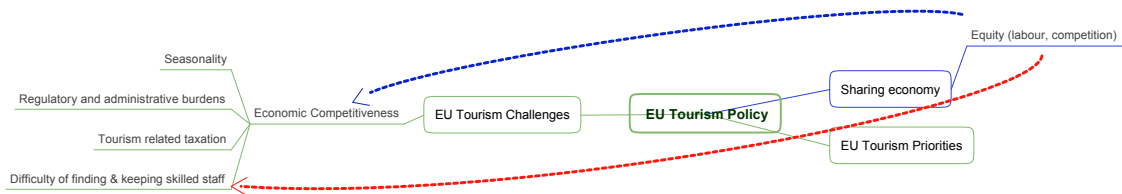
The regulatory and administrative burden may present both threats and opportunities. The main threat is the need for regulation and certification. This need could significantly increase regulatory burden due to the small size and large number of offers. Alternatively, there may be an opportunity to reduce the regulatory and administrative burden of for-profit suppliers of accommodation, transport, etc., whilst at the same time introducing a minimum of regulation for the sharing economy offers.

#### 4.4.4. Taxes



The sharing economy supply evades paying **Taxes**, which has two contradicting effects on the EU tourism policy challenge **Economic Competitiveness**: it may reduce the cost of EU destinations and thus make the EU compete better with other regions in the world. Tax evasion also reduces income from *Tourism Related Taxation* and other taxes and thus reduces government budgets supporting development at the destination (infrastructure, destination marketing, destination management, leisure facilities, etc.). The main taxes avoided by the sharing economy are tourism tax and VAT. The City of Amsterdam has successfully introduced these for Airbnb accommodation (Malhotra and Van Alstyne, 2014).

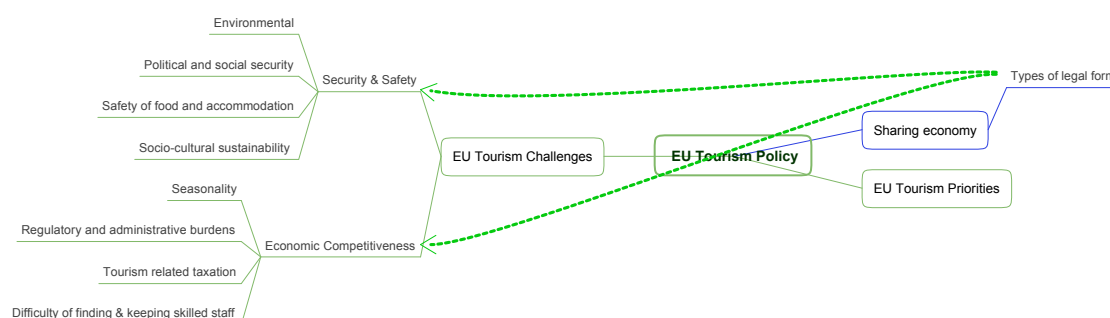
#### 4.4.5. Equity (labour, competition)



The **Equity** challenge of the sharing economy is related to two main subjects: equity at the business level and equity for employees. The first links to **Economic Competitiveness**, while the second relates to the difficulty in *Finding & Keeping Skilled Staff*. The sharing economy circumvents both taxes and costly regulations thus being able to offer much lower prices, but also present an opportunity because sharing economy enterprises and platforms are more innovative and efficient, thus helping the destinations to become more price competitive on the market. The consequence of the latter effect might be a reduction in spending of intra-EU tourists, although it may help to attract more tourists from outside of the EU and encourage some citizens to stay within the EU.

For employment the impacts are mainly negative and concern wages, (health) insurance, liability, and safety for those individuals (peers) offering products or services.

#### 4.4.6. Types of Legal Form



The **Types of Legal Form** present opportunities for the tourism sector regarding tourism policy challenges within **Economic Competitiveness** and **Security & Safety**. Issues to be addressed include precise definitions of non-profit and for-profit enterprises, which revenues should be considered income, and how to facilitate private asset valuation. For instance, Tracxn.com (2015) distinguishes between peer-to-peer and B2B. The latter is interesting for tourism policy, enabling better use of resources through digital platforms, including office and kitchen space, cooking capacity, equipment share, storage.

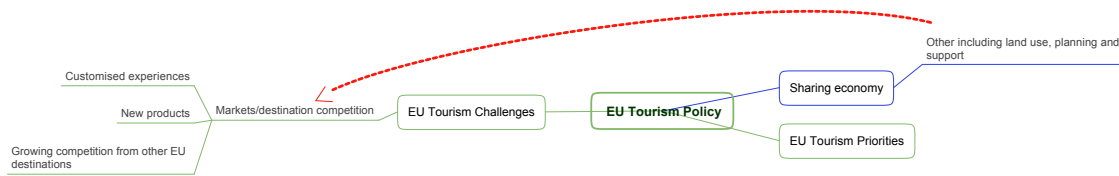
Such definitions form the basis for including sharing economy enterprises in some minimal requirements regarding safety, quality, planning, taxation and liability. Also, the value of non-compensated content like customer reviews should be defined and handled. Some researchers see a central role for flexible regulation, for example for fair reporting and fraud protection although governance needs to be designed in a way that it does not hamper the innovative power of the sharing economy (Malhotra and Van Alstyne, 2014).

Some opportunities for enhancing economic competitiveness through making sharing services part of the whole destination (including transport) may be:

1. By streamlining existing regulation to include all conventional and sharing economy enterprises, the administrative burden on the many very small conventional for-profit enterprises (B&B or cottages with only a few rooms) could be significantly reduced, therefore ensuring competitiveness with the sharing economy.
2. The large number of sharing economy enterprises may add to the whole destination profile and could be included in the conventional tourism sector, but with minimal regulation to prevent real safety, environmental, and labour problems, without impacting on the innovative nature of the platforms.
3. Customer reviews, which form an integral part of the sharing economy platforms, may be used to help integrate within existing local rating systems.
4. Regulation should be flexible and 'learn' to keep the innovative nature of the sharing economy, whilst preventing the most significant problems.



#### 4.4.7. Land use, planning and support



Within destination planning, spatial planning helps prevent conflict between functions such as residential and commercial areas. Experience with sharing economy accommodation, which are by definition confined to residential areas, have already resulted in conflict between local residents and tourism development (Sinkeviciute, 2014).

There is an opportunity for governments to develop their own i-teams to integrate policies with the innovations coming from the sharing economy (Puttick et al., 2014). To make this happen, governments should stimulate demand and couple it with policies that avoid intellectual monopolisation of the economy (Pagano and Rossi, 2009). Finally, the sharing economy has also delivered peer-to-peer education like Skillshare and Udemy (Sundararajan, 2014). These provide governments with opportunities to educate tourism SMEs.

#### 4.5. Conclusion and recommendations

This chapter explored the policy challenges the sharing economy poses in general and to tourism in particular. Current legislation has its roots in the ownership-based economy and is less well adapted to the sharing economy. Anticipatory governance may regulate the sharing economy, balancing its innovative nature whilst avoiding its societal and economic disadvantages. Governments should also consider applying the principles of sharing to their governance.

The main issues with the sharing economy are taxation, licensing & certification, safety, liability, trust, labour & competitive equity, types of legal form, spatial planning, and how to apply sharing economy principles to government itself. Although an EU-wide sharing economy policy has yet to be developed, the main strategies for governance are i-teams, EU guidelines for DMOs and development of a best and bad practice database.

The sharing economy may have strong negative impacts on the existing tourism sector at certain destinations, for instance through unfair competition due to unequal tax and regulatory regimes, the strong mechanism of 'the winner takes all' principle, and loss of quality and employment.



## 5. CONCLUSIONS AND RECOMMENDATIONS

### KEY FINDINGS

- **Short definition:** The sharing economy covers transactions between peers that are enabled by for-profit or non-profit platforms using modern communication technologies. **Formal definition:** The sharing economy is a set of practices, models and platforms that, through technology and community, allows individuals and companies to, at least partly, share access to products, services and experiences. It includes non-profit and for-profit platforms that have emerged from an originally pure sharing economy, peer-to-peer and/or non-profit organisations. The sharing economy follows two principles: a **platform** (non-profit to for-profit) and **product/service provider orientation** (peer-to-peer versus business-to-peer – i.e. customer).
- The **size of the sharing economy** still is less than 1%, but it is growing fast: In some cases it is already in the last phase of the S-curve development, with a **maximum observed 10% share** in the accommodation sector, though on average less than 1%.
- **Successful sharing economy enterprises** tend to move away from pure non-profit platforms of the sharing economy that enable peer-to-peer transactions to for-profit business-to-customer trade. Based on this, the sharing economy is an important **initiator/innovator** for conventional economy.
- The large investments in technology and the value generated by the size of a platform create a system where **the winner takes all**, causing **market concentration** and the **failure of competition**.
- The following problems have been identified: social discontent, quality and lack of trustworthiness, dependency on platforms and disruption of existing economies.
- The original ideal of an entirely free sharing economy does not appear to be desirable from a governance perspective.
- Anticipatory governance might regulate the sharing economy by finding a balance between enhancing its innovative power and avoiding its societal and economic disadvantages.
- Governments should consider applying the principles of sharing to their projects of governance by using the platform technology to involve stakeholders and citizens and even to acquire skilled volunteers to support tasks of the governments.
- The main issues with the sharing economy are to be found in taxation, licensing and certification, safety, liability, trust, labour and competitive equity, types of legal forms, and spatial planning.
- Main strategies for governance are to issue EU guidelines for destination management organisations (DMOs) and maintenance of a best and bad practice database.

## 5.1. Introduction

The sharing economy was found to be growing quickly. We also found that many sharing platforms were closely related to tourism (mainly in transport and accommodation) but also in other leisure assets or services. The sharing economy is made possible through the diffusion of social media and mobile technology. But its main drivers are convenience as well as societal concerns of environment and equity, partly fuelled by the 2008 financial crisis. The growth of sharing has also been driven by simple economics of 'almost zero marginal costs' of production. The latter is explained by the fact that existing spare assets (unused room, car or bicycle, etc.) are put into the market at very low marginal costs as the asset itself is already paid for. The cost of maintaining an account on platforms is the main cost. Creating a platform requires large investment, but once established the marginal cost of adding a room or car is almost zero. This may explain the sometimes extreme growth.

The sharing economy can be categorised in four categories composed of non-profit versus for-profit platform and peer-to-peer versus business-to-peer product/service provider orientation. This delivers four 'quadrants' where the for-profit business-to-peer is considered to be very similar to conventional economy, but making use of the same technology to create sharing economy platforms (well-known examples are the many air ticket and accommodation booking platforms like Expedia and booking.com).

From the large number of definitions used for the sharing economy the following was refined and adopted for this study: *The sharing economy is a set of practices, models and platforms that, through technology and community, allows individuals and companies to, at least partly, share access to products, services and experiences. It includes non-profit and for-profit platforms that have emerged from an originally pure sharing economy, peer-to-peer and/or non-profit organisations.*

A more informal definition could be: *The sharing economy covers transactions between peers that are enabled by for-profit or non-profit platforms using modern communication technologies.*

This definition highlights that pure for-profit platforms enabling business to customer sales (like booking.com) are excluded as the focus lies on selling and not sharing. It was often thought that big commercial platforms should be considered part of the sharing economy, but that is based on these platforms using the same technology including customer review systems. In these cases there is no actual sharing occurring. Therefore, such platforms were not considered as part of the sharing economy for the purposes of this study (e.g. booking.com, expedia.com). Mitas et al. (2015) elaborates on these technologies and their role in tourism.

An important insight from the literature is that it still is too early to draw any robust empirical conclusions about whether the sharing economy will have a positive effect on growth and welfare, even though that may seem likely (Sundararajan, 2014). Some studies, for example on the impact of Airbnb on other accommodation providers in Texas (Zervas et al., 2014) have been published, but there are too few for a clear overview of what is going on. However, the scattered information available does raise questions about the unregulated development of the sharing economy and shows both opportunities and serious problems.

## **5.2. Trends, developments and mechanisms**

The global sharing economy was valued at \$26 billion in 2013, most of which is tourism related (accommodation, transport, leisure, travel services). This corresponds to 0.035% of the global economy and about 1.2% of the global tourism economy. These are small proportions, but with growth rates of up to 50% per year, they may become very significant within one or two decades. On the other hand, successful sharing economy enterprises tend to be bought by investors or entrepreneurs converting the platforms to 'for-profit' organisations and then often proceeding from peer-to-peer towards business-to-customer. The original car drive-sharing taxi service Uber is an example of a service that now also offers professional taxi drivers who do not share a drive, but simply offer transport in a commercial sense. At that moment, such platforms drop at least partly out of the sharing economy and become regular or conventional economy businesses. In this way, the pure sharing economy is an important initiator/innovator for the conventional economy which may change the way people look at and value ownership. Apart from that, sharing platforms advance the use of customer rating systems and direct customer involvement in product development.

Finally, an important consequence of the evolution of sharing economy platforms is that the large investment in technology and the competitive edge created by the size of platforms generates an outcome whereby the winner takes all, causing market concentration and failing competition. Through these mechanisms of market concentration and shift to for-profit large scale businesses, the original principles of the architects of a pure sharing economy are increasingly compromised.

## **5.3. Best practices and lessons learned**

The sharing economy has initiated many new organisations that apparently have been able to spot unfulfilled consumer needs and which have made the valorisation of non-used private assets possible. Based on a worldwide self-reporting database, a total of 491 platforms and initiatives were identified in the broader tourism sector (see Annex I). As new platforms come and go at high rates, it is difficult to say how complete this list is and how many of the listed platforms do not exist anymore. A global or European registration of platforms does not exist. Several of the platforms listed have grown into multinational companies that employ many 'freelancers', the original peers. The community building qualities of the sharing economy may apply to the smaller peer-to-peer non-profit platforms. But good examples of this type of organisation were not found for the tourism sector.

What seems to be an efficient way to create value with one's property may also have turned into a way of easy money making for a limited number of platform owners. The providers, the owners of the properties, receive a precarious income that is subject to increasing competition and fading financial and commercial power. The power of a platform is very much based on its size, as customer attraction comes mainly from having one place to compare and book all the services or products. Booking.com is a good example of such a huge platform, although not in the sharing economy, that dominates the market and sets the prices. As a result, funds may not be reserved for maintenance, education or investment in innovation. The consumers are given more options, but this additional quantity does not necessarily add to the overall quality as there is no governance. The control mechanism entirely depends on peer-review systems, which may be not always trustworthy. Finally, the service and product providers are required to give their personal information to the platform owners who might use it for other purposes.

## **5.4. Policies and recommendations**

The original idea of an entirely free sharing economy, that some picture as a runaway innovation economy, does not find much support with scholars or policy makers. The need for some form of governance has become clear from the many examples of issues of equity, safety, liability, and quality. Some governance will be required to optimize the transition service and to avoid undesirable environmental impacts and improve overall system performance (Cohen and Kietzmann, 2014). Generally speaking, scholars, politicians and business owners increasingly see the need for government regulation of the sharing economy. The biggest challenge will be to lessen the societal disadvantages, such as unrealistic low revenues for services and products, market concentration, lack of competition within the sharing economy and to maintain a balance between the conventional and sharing approaches.

Current legislation has its roots in the ownership-based economy and is less well adapted to govern the sharing economy. It is concluded that anticipatory governance may be suited best to regulate the sharing economy as it allows a balance between enhancing innovative power and avoiding societal and economic disadvantages. Furthermore, governments and DMOs should also consider applying the principles of sharing to their governance.

The main issues with the sharing economy are taxation, licensing and certification, safety, liability, trust, labour and competitive equity, definitions of the legal form, spatial planning and applications to government. Although an EU-wide sharing economy policy has yet to be developed, based on recommendations from the EESC opinion (European Economic and Social Committee 2014), the main strategies for governance of the sharing economy within tourism are i-teams, EU guidelines for DMOs, maintenance of a best and bad practice database, a research and monitoring programme and a better understanding of the impacts of the sharing economy on the main policy challenges in the EU tourism sector.

The sharing economy may have strong negative impacts on the existing tourism sector at certain destinations. Unfair competition due to unequal tax and regulatory regimes may allow a single platform to dominate a certain area, threatening quality and employment. Table 4 lists the main policy recommendations and differentiates between direct policy action, research, guidelines and i-teams.

**Table 4: Key policy recommendations**

Policy recommendation	Kind of action
EU tourism policy should align with the general EU policy regarding the sharing economy (as described by the EESC opinion, Hernández Bataller, 2014) to compile basic rights and principles already enshrined in EU law to protect the public.	Action
Adopt the principle of and develop an adaptive tourism policy with regard to governance and development of the sharing economy in the EU tourism sector.	Action
Research is needed to understand the development and impacts of the sharing economy on the EU tourism sector and the mechanisms behind these impacts and developments.	Action
An EU study on the economic, environmental, competitive and quality opportunities and legal, competitive, spatial, seasonal and financial (taxes) challenges of the sharing economy in tourism is needed.	Research
A study on how environmental and quality labels could best be introduced to sharing economy suppliers of accommodation, transport, and other tourism services at destination level is recommended.	Research
A development of EU level guidelines for destinations on what and how to regulate regarding sharing economy services for accommodation, tours, transport and other services introduced by sharing economy platforms would be useful. These guidelines should include governance recommendation for environmental protection, safety, insurance, legal form, taxes, levies, licences, labelling, employee and entrepreneur protection, equity, seasonality, and a level competitive playing field.	Guidelines
An EU level database with good (and bad) practices within sharing economy platforms, products, services and policies that may help destinations to explore the opportunities of the sharing economy technology and innovations to enhance customised experiences, develop new products, and control the competition between EU destination should be developed.	Databases/ case studies
Encourage the development of i-teams to ensure tourists and residents empower and inspire each other, without causing disturbance (noise, pollution, disruptive behaviour) and to help local governments and DMOs to embed the innovative power of the sharing economy into both the conventional tourism sector and the DMOs themselves.	i-teams
Local and national governments should consider implementing i-teams to help destinations develop the sharing economy technology and its use in a balanced and fair way.	i-teams
The challenge of technology may benefit from the arrival of some of the high tech platforms at destinations. Governments may create i-teams to guide this development and ensure the advantages are taken, while minimising negative effects.	i-teams

**Source:** Authors





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## ANNEX I: LIST OF GLOBAL COLLABORATIVE INITIATIVES

**Table 5: Overview of platforms and initiatives (collaborative consumption, 2015). The initiatives have been self-reported on the website of Collaborative Consumption (collaborativeconsumption, 2015), which means that in many cases descriptions were not provided.**

<b>Name</b>	<b>Description</b>	<b>Travel</b>	<b>Transport</b>	<b>Leisure</b>
<b>123envoiture</b>		0	1	0
<b>3RD HOME</b>		1	0	0
<b>99Gamers</b>		0	0	1
<b>9Flats</b>		1	0	0
<b>A City With Quirk</b>		1	0	1
<b>Aarhus Bicykler</b>		0	1	0
<b>AdalBdal</b>		0	0	1
<b>Adslist</b>	ADsList is a general classifieds website where users can post ads or any kind of things that they do not need in a specific category for the purpose of selling or exchanging. Registered users have the ability to delete, edit, activate/de-activate, renew ads and also making the ads premium.	0	1	1
<b>Agora Food &amp; Beverages</b>	Agora is a beverage company that is run through a direct democratic process by an online community. In other words, you are making all the decisions from what beverage to produce, how to package it, where to sell and even what to do with the profits! Sign up now at <a href="http://www.myagora.co.uk">www.myagora.co.uk</a> and start sharing and learning.	0	0	1
<b>Airbnb</b>		1	0	0
<b>Allegro</b>		0	0	1
<b>AlterNetRides</b>		0	1	0
<b>Amovens</b>		0	1	0
<b>Ants</b>		0	1	0
<b>AnyVan</b>	ANYVAN.com helps you find the right man with a van for the right price.	0	1	0
<b>Autodelen</b>		0	1	0
<b>autolib</b>		0	1	0
<b>Autoshare</b>		0	1	0
<b>Autour de Toi</b>	Autour de Toi is your platform for everything local and collaborative in and around Maisons-Laffitte in les Yvelines (78) close to Paris. The web-site not only offers a local free, marketplace for neighbours to exchange (give, lend, sell) goods and services, to exchange news – and last but not least: help connecting people.	0	0	1
<b>Avego</b>		0	1	0
<b>B-cycle</b>		0	1	0
<b>Backpack</b>		0	0	1
<b>backpackmojo</b>		1	0	0

<b>Name</b>	<b>Description</b>	<b>Tra vel</b>	<b>Trans port</b>	<b>Leis ure</b>
<b>Backseat Surfing</b>		0	1	0
<b>BagHitch</b>	Get there and get things there, cheaper. BagHitch is a new innovative way of transporting. Use the empty space in your car for transporting of other peoples treasures. You'll get to your destination with more money in your pocket and be a part of improving the environment with less traffic on the roads.	0	1	0
<b>Barclays Cycle Hire</b>		0	1	0
<b>Barnacle</b>	Barnacle is a community that lets you ship your most treasured possessions between cities through a trusted network of drivers already en route. Ship Outside the Box: Barnacle is a community that lets you ship your most treasured possessions through a trusted network of drivers already en route.	0	1	0
<b>BarterSugar</b>		0	0	1
<b>Barton &amp; Gray Mariners</b>		0	1	0
<b>Bed&amp;Fed</b>		1	0	0
<b>Beneteau Fractional Yachting (USA)</b>		0	0	1
<b>Beyond Croissant</b>		1	0	0
<b>Bicing (Barcelona, Spain)</b>		0	1	0
<b>Big Fish (UK)</b>		0	0	1
<b>Bike and Roll</b>		0	1	0
<b>Bike Kitchen</b>	Bike workshop, bike fixing, bike destroying, DIY	0	1	1
<b>Bike Station</b>		0	1	0
<b>BikeOne (Poland)</b>		0	1	0
<b>BikeSauce</b>		0	1	1
<b>BikeSurf Berlin</b>		0	1	0
<b>BilPool</b>		0	1	0
<b>Bixi</b>		0	1	0
<b>Bizi (Zaragoza, Spain)</b>		0	1	0
<b>BlaBlaCar</b>		0	1	0
<b>Board a Boat</b>	Peer-to-peer boat rental marketplace, connecting people who want to go boating with boat owners.	0	1	1
<b>Boatbound</b>		1	1	0
<b>Boaterfly</b>	1st peer-to-peer rental website for all kinds of nautical vehicles. Sailboats, powerboats, zodiac, windsurfs, light sailboats, kayaks, jetskis, river boats... Boaterfly opens the door to temporary ocean and sea travelling off the beaten track. Owners turn their watercrafts profitable, while tenants enjoy fair prices and warm welcoming.	1	0	1
<b>BoatSetter</b>	BoatSetter is a unique Peer-to-Peer Boat sharing marketplace that, for the first time, makes boat rentals accessible to consumers regardless of their boating experience. Boatsetter allows boat owners to rent their boats capitalizing on the fact that boats sit idle 95% of the year. By combining best-in-class collaborative market tools with unprecedented industry partnerships, BoatSetter	0	1	0

<b>Name</b>	<b>Description</b>	<b>Tra vel</b>	<b>Trans port</b>	<b>Leis ure</b>
<b>Bookelo</b>	Bookelo ist das Soziale Netzwerk für Bücherfreunde auf der ganzen Welt. Bei Bookelo kannst Du Dir kostenlos Bücher bei Freunden, Nachbarn und Kollegen in Deiner Umgebung ausleihen. Du kannst einfach von zu Hause im Bücherregal Deiner Freunde stöbern und Ihnen bequem eine Anfrage schicken, wenn Dich ein Buch interessiert.	0	0	1
<b>BOOTLEG MARKET</b>	The global peer-to-peer marketplace, where anyone can buy and sell shoes with brands and one another directly. Beautifully curated and poised to be the answer when someone asks, "Where did you get your shoes?" Empowering small designers and vendors from all over the world. Anyone can have a shoe store!	0	0	1
<b>BringBee</b>		0	0	1
<b>Broads Abroad Travel Network</b>	Broads Abroad is a female-only online membership based social network listing opportunities for members to stay free of charge with like-minded women around the world.	1	0	0
<b>Buffalo CarShare</b>		0	1	0
<b>BuyMyWardrobe</b>	BuyMyWardrobe is an online marketplace for preowned designer fashion. The origins of the business are fashion recycling events held in upmarket locations around London. The online marketplace launched in 2012.	0	0	1
<b>BuzzCar</b>		0	1	0
<b>Bycyklen (Copenhagen, Denmark)</b>		0	1	0
<b>byke</b>		0	1	0
<b>CabCorner</b>		0	1	0
<b>Cabmix</b>		1	1	1
<b>Calgary CarShare</b>		0	1	0
<b>Call A Bike</b>		0	1	0
<b>CambioCar</b>		0	1	0
<b>CampInMyGarden</b>		1	0	1
<b>Canhav</b>	Canhav is the open marketplace for barter deals. The place to buy products and services without spending money.	0	1	1
<b>Capool Arabia</b>		0	1	0
<b>Car 2gether</b>		0	1	0
<b>Car Next Door</b>	Car Next Door is fundamentally changing the way Australia travels by turning any car into a share car. We let Car Owners earn \$2-10k per year sharing their car when they aren't using it whilst allowing Car Borrowers to instantly rent cars nearby from \$5 p/h and \$25 p/d.	0	1	0
<b>Car share inventory</b>		0	1	0
<b>Car To Go</b>		0	1	0
<b>Car2Go Ulm</b>		0	1	0
<b>Carbon Voyage</b>	Voyage Market is a B2B marketplace that leverages their growing user base to buy and sell freight journeys at discounted rates through sharing freight journeys and filling empty backloads.	0	1	0
<b>CarCity (Italy)</b>		0	1	0

<b>Name</b>	<b>Description</b>	<b>Tra vel</b>	<b>Trans port</b>	<b>Leis ure</b>
<b>Carclub</b>	Carclub is the first and only community based co-owning service for special cars globally.	0	1	0
<b>Career Intercom</b>	Career Intercom connects job seekers to each other so they can share leads. Leads that one job seeker can't use is useful to another job seeker.	0	0	1
<b>Carona Solidaria</b>		0	1	0
<b>Caroneiros</b>		0	1	0
<b>Caronetas</b>		0	1	0
<b>Carplus (UK)</b>		0	1	0
<b>Carpool Connect</b>		0	1	0
<b>Carpool Date</b>		0	1	0
<b>Carpool King</b>		0	1	0
<b>Carpool One</b>		0	1	0
<b>Carpool Plaza</b>		0	1	0
<b>Carpool Plein</b>		0	1	0
<b>Carpooling</b>		0	1	0
<b>Carpooling Network</b>		0	1	0
<b>CarpoolWorld</b>		0	1	0
<b>CarShare HFX</b>		0	1	0
<b>CarShare Vermont</b>		0	1	0
<b>Carzapp</b>		0	1	0
<b>CasaVersa</b>		1	0	1
<b>Catchalift</b>		0	1	0
<b>Chaos Cooking</b>	Good People + Good Food = Good Times Simply put, Chaos Cooking is a participatory cooking extravaganza. It's a social community centered around cooking and conversations. We've created an easy way to meet new friends in your town while cooking together. Chaos Cooking takes people away from their computers and encourages real face to face.	0	0	1
<b>Ciluna</b>		0	0	1
<b>Cinese</b>	Cinese connects people who are interested in teaching and learning together. Share knowledge and skills with your local community. Get together with people who share your interests and passions.	0	0	1
<b>Citi Bike</b>		0	1	0
<b>City Car Club</b>		0	1	0
<b>City Carshare</b>		0	1	0
<b>Citybike</b>		0	1	0
<b>Citycar</b>		0	1	0
<b>Cityhop</b>		0	1	0
<b>CityWheels</b>		0	1	0
<b>Cityzencar</b>		0	1	0
<b>Classic Car Club</b>		0	1	0
<b>Classic Car Share</b>		0	1	0



<b>Name</b>	<b>Description</b>	<b>Tra vel</b>	<b>Trans port</b>	<b>Leis ure</b>
<b>Club Sportiva</b>		0	1	1
<b>co-transport</b>		0	1	0
<b>COINT</b>	COINT is a new marketplace that has its very own digital currency. We are creating a new platform based on the idea that everyone we can ever meet knows and owns things that we don't. Set out to create a global peer to peer network where you can share your gift with the rest of the community.	0	0	1
<b>Collegiate Bicycle Company</b>		0	1	0
<b>ComboRides</b>	ComboRides.com is the Bulgarian ride sharing platform. The company was launched at the end of 2013 and our goal is to introduce the benefits of and enable people to share a ride in Bulgaria. Using our platform people can share a ride between cities, to work and even abroad.	0	1	0
<b>Communauto</b>		0	1	0
<b>Communi.st</b>		0	0	1
<b>Community Car</b>		0	1	0
<b>Compare and Share</b>	Compareandshare.com is the world's one-stop comparison marketplace of the Sharing Economy that saves you money and time by making a whole variety of goods and resources available to you in one click. From spare rooms to sports equipment, there are over £3.5 trillion worth of unused goods for you to benefit from.	0	1	0
<b>Comuto</b>		0	1	0
<b>Connect by Hertz</b>		0	1	0
<b>Coopiloto</b>	The start-up Coopiloto is the first online carpooling platform in Puerto Rico (www.coopiloto.net), an innovative way to drive transportation efficiency around the island through collaborative consumption (ride-sharing). Coopiloto is a non-profit project that was launched in January 2014 and represents a low-tech, high-impact strategy that will empower people by improving their mobility, while reducing fuel.	0	1	0
<b>CoVoiturage</b>		0	1	0
<b>CrewWithMe</b>	CrewWithMe is a rideshare web application helping recreational boaters make greater use of their boats by matching them to keen crew. Owners get to use their vessels more often, while crew get onto the water without ownership, and they share the costs	0	1	1
<b>Cronoshare</b>	Cronoshare is an online meeting point between customers who want a service done such as tutoring, cleaning, house repairs or anything else; and the professionals who are interested in finding part time jobs to fill free time slots.	0	0	1
<b>CrowdRoaming</b>		0	0	1
<b>Curvy Road</b>		0	1	1
<b>CuseCar</b>		0	1	0
<b>Cycle Chalao</b>		0	1	0
<b>Das Radhaus</b>	Bike workshop, bike fixing, DIY	0	1	0
<b>Date My Wardrobe</b>	Date My Wardrobe is an online marketplace for renting high end wardrobe items.	0	0	1

<b>Name</b>	<b>Description</b>	<b>Tra vel</b>	<b>Trans port</b>	<b>Leis ure</b>
<b>Denzeldrive</b>		0	1	0
<b>Deways</b>		0	1	0
<b>digihitch</b>		0	1	0
<b>Divvy</b>	Divvy brings people together to own and share the things they love. Divvy drastically reduces the cost for consumers by letting them split payment and ownership with small groups.	0	0	1
<b>DIY Fractional</b>		0	1	1
<b>Djengo</b>		0	1	0
<b>donnons</b>		0	0	1
<b>Dopios</b>		0	0	1
<b>DreamsScanner</b>	DreamsScanner is an online marketplace where travelers can buy and offer experiences, activities and tours created by locals.	1	0	1
<b>Drive Moby</b>	Drive Moby can give you membership and get your own car, which you can rent out to drive cheaper or even for free.	0	1	0
<b>Drive My Car Rentals</b>		0	1	0
<b>Drivenow</b>		0	1	0
<b>Drivy</b>		0	1	0
<b>Dublinbikes (Dublin)</b>		0	1	0
<b>Duckseat</b>		0	1	0
<b>E-Car Club</b>		0	1	0
<b>e-loue</b>		0	0	1
<b>Eat With a Local</b>		1	0	1
<b>eBay</b>		0	0	1
<b>Ecobici</b>		0	1	0
<b>ecofreek</b>		0	0	1
<b>ecolutis</b>		0	1	0
<b>eGo CarShare</b>		0	1	0
<b>Enterprise Carshare</b>		0	1	0
<b>Entrusters.com</b>	Entrusters.com is a global peer-to-peer delivery platform providing customers with access to products through a community of Trusted Travelers, enabling customers to purchase anything from anywhere.	0	0	1
<b>Erento</b>		0	0	1
<b>eRideshare</b>		0	1	0
<b>Everaround</b>	Local experiences, activities and tours. A marketplace where locals can share knowledge with travellers wanting to explore.	1	0	1
<b>Evermarine (USA)</b>		0	0	1
<b>eXpertLocal</b>		0	0	1
<b>EZ RV Hire</b>	At EZ RV Hire we quickly connect renters with the Recreational Vehicle (RV) owners who want to hire them out along with all their leisure equipment. And we make all the confusing, messy paperwork and advertising easy.	0	1	1

<b>Name</b>	<b>Description</b>	<b>Tra vel</b>	<b>Trans port</b>	<b>Leis ure</b>
<b>Ez-Park</b>	Ez-Park allows everyone to offer and search for parking spaces in a simple, fast and safe way.	0	1	0
<b>Fanbed Ltd</b>	Sports fans and athletes – book accommodation & parking near to sports venues and starting lines; list your accommodation and parking for free. Register today.	1	1	1
<b>FanFootage</b>	FanFootage takes live video shot by fans at music or sporting events and automatically syncs this with professionally-recorded live audio.	0	0	1
<b>Fare/Share NYC</b>		0	1	0
<b>Fica La Em Casa</b>		1	0	0
<b>Flexiblers (UK and Ireland)</b>		0	1	0
<b>Flexicar</b>		0	1	0
<b>FlightCar</b>		0	1	0
<b>Flinc</b>		0	1	0
<b>FOF Travel</b>		1	0	0
<b>Fractional Life</b>		0	0	1
<b>FRED – Books &amp; People around us</b>	Fred is a proximity based social network where everybody can share his own paper books and meet the people around.	0	0	1
<b>Freecycle.org (global)</b>		0	0	1
<b>FreeGive</b>		0	0	1
<b>Freegle</b>		0	0	1
<b>Freeglerξ</b>		0	0	1
<b>FreeMesa</b>		0	0	1
<b>Freerun</b>		0	1	0
<b>Freesharing</b>		0	0	1
<b>Freewheelers (U.K)</b>		0	1	0
<b>Freewheelin</b>		0	1	0
<b>FriendsWithThings</b>		0	0	1
<b>FunRide</b>		0	1	0
<b>gchangetout</b>		0	0	1
<b>GearCommons</b>		0	0	1
<b>GearSpoke</b>		0	1	1
<b>Get My Boat</b>		0	1	0
<b>Getaround</b>		0	1	0
<b>GetMyBoat.com</b>	GetMyBoat is the world’s largest and fastest growing community-driven boat rental and charter marketplace. Owners on GetMyBoat rent or charter out their underutilized watercraft — from kayaks to catamarans, powerboats, and sailboats — in more than 1,100 locations worldwide. Boaters browse watercraft that meet their specifications and budget, then reserve them online or via mobile phones.	0	0	1
<b>Getrid</b>	Getrid is a mobile application that helps people to get rid of things they don’t need anymore and finds things that could be reused.	0	0	1

<b>Name</b>	<b>Description</b>	<b>Tra vel</b>	<b>Trans port</b>	<b>Leis ure</b>
<b>Gidsy</b>		1	0	1
<b>Gigot</b>		0	0	1
<b>Gimme Clubs</b>	We are a golf club sharing community. We are an online marketplace that allows golfers to rent out their clubs when they're not using them to other golfers who need clubs because they're on vacation or don't have their own set.	0	0	1
<b>Global Barter Platform</b>		0	0	1
<b>glover GmbH</b>	The German short term rentals pioneer. Connecting hosts and travelers worldwide with a large range of accommodation types: from couch to vacation home, from a room in a private home to bed and breakfasts.	1	0	0
<b>go2gether</b>	go2gether is a very simple way for you to instantly find anyone who is going the same way you are. As a result, we make ridesharing seamless, effortless and easy. go2gether envisions to help people to save time, money and protect the environment, while ultimately creating a community of friendly commuters!	0	1	0
<b>GoCar</b>		0	1	0
<b>goCarShare</b>		0	1	0
<b>GoGet</b>		0	1	0
<b>gomore</b>		0	1	0
<b>GoodGym</b>		0	0	1
<b>GoShare</b>	GoShare is a peer-to-peer network that connects people who have a pickup truck, van, or SUV with people nearby who need help moving, towing, hauling, shipping or delivering an item over short distances. The GoShare mobile apps allow customers to request a truck, van, or SUV on demand.	0	1	0
<b>goshi</b>		0	0	1
<b>GratiFeria</b>		0	0	1
<b>GreenShareCar</b>		0	1	0
<b>Greenwheels</b>		0	1	0
<b>Grub Club</b>		0	0	1
<b>Gruenes Auto (Denmark)</b>		0	1	0
<b>GuestToGuest</b>	GuestToGuest is a social network whose members exchange their apartments or homes over the holidays for free. The most important innovation is its brilliant system of points known as GuestPoints. These points make it possible to make a non-reciprocal exchange, further increasing exchange opportunities for all members.	1	0	1
<b>Guidehop</b>		0	0	1
<b>Gumtree</b>		0	0	1
<b>Hacklab</b>		0	0	1
<b>HelloMarket</b>		0	0	1

<b>Name</b>	<b>Description</b>	<b>Tra vel</b>	<b>Trans port</b>	<b>Leis ure</b>
<b>HelpStay</b>	Travel & Stay for free in return for a few hours of honest help -www.helpStay.com HelpStay™ is a new way of traveling by combining it with sharing. Its' made possible by creating an online community platform that introduces independent travellers, who provide volunteer help to local hosts who offer in exchange accommodation. The independent traveller provides a few hours of honest help in exchange for accommodation and board.	1	0	1
<b>HipHost</b>		1	0	0
<b>hitchhikers.org</b>		0	1	0
<b>Hive Rides</b>		0	1	0
<b>HomeAway</b>		1	0	0
<b>HomeDine</b>		1	0	0
<b>HomeExchange</b>	Travel anywhere and stay for free with HomeExchange.com.	1	0	1
<b>Homestay</b>		1	0	0
<b>Hoobly</b>		0	0	1
<b>HourCar</b>		0	1	0
<b>Housetrip</b>		1	0	1
<b>HZ Bike (China)</b>		0	1	0
<b>I Let You</b>		0	0	1
<b>I-Go Car Sharing</b>		0	1	0
<b>icarpool.com</b>		0	1	0
<b>ICS</b>		0	1	0
<b>iRent2U</b>		0	0	1
<b>itcitytours</b>	Free tours, budget tours and more. Bringing free tours and city greeting to every city in the world by allowing individuals and small companies to market, reserve and sell their walks for free.	1	0	1
<b>Ithaca Carshare</b>		0	1	0
<b>Jayride</b>		0	1	0
<b>JeLoueMonCampingCar.com</b>		0	1	0
<b>Jetlimo</b>		0	1	0
<b>Jointli</b>		0	0	1
<b>JoinUp Taxi</b>		0	1	0
<b>Jump On Flyaways</b>		1	1	0
<b>Jupiter's Motoshare</b>		0	1	1
<b>JustShareIt</b>		0	1	1
<b>kartag</b>		0	1	0
<b>Keycafe</b>		1	0	0
<b>Kind Exchange</b>		0	0	1
<b>Kitesurfing Market</b>	Kitesurfing Market is a peer-to-peer platform allowing kitesurfers to sell and buy second-hand kitesurfing gear.	0	0	1

<b>Name</b>	<b>Description</b>	<b>Tra vel</b>	<b>Trans port</b>	<b>Leis ure</b>
<b>Knok</b>	Knok is the first Family Travel Network: Connect to thousands of like-minded families, who let each other stay at our beautiful homes on vacation.	1	0	1
<b>kozaza.com</b>	kozaza.com: Book Homes in Seoul. Kozaza is a home sharing service located in and focused on Seoul, Korea. Find a unique space to stay in Seoul: homestay, guest houses, studio, Hanokstay and Templestay at <a href="http://kozaza.com">http://kozaza.com</a> . Kozaza is a Sharing Startup designated by the Seoul Metropolitan Government. It was founded on January 19, 2012 by SanKu.	1	0	1
<b>Kukunu</b>		1	0	1
<b>LAXCarShare</b>		0	1	0
<b>le comptoir du don</b>		0	0	1
<b>Leila</b>		0	0	1
<b>LifeThek</b>		0	0	1
<b>Liftshare</b>		0	1	0
<b>Liftsurfer</b>		0	1	0
<b>Liquid</b>		0	1	0
<b>Literatoo</b>	Booksharing platform to lend and borrow books in your region for free	0	0	1
<b>Livop</b>		0	1	0
<b>Loanables</b>		0	0	1
<b>Local Motion</b>		0	1	0
<b>LocalYoo</b>	Localyoo.com is a community marketplace connecting travelers with local experts. We enable travelers to book tips, itineraries and experiences from a variety of qualified locals. We believe that the important thing is to experience a place from a local perspective and try to create real connections between tourists and local people around the world.	1	0	1
<b>Lock8</b>	LOCK8 is a global platform for bike-sharing, enabled through the world's first smart, keyless bike lock.	0	1	0
<b>Locongo</b>		0	0	1
<b>Lyft</b>		0	1	0
<b>MagicEvent.com</b>	MagicEvent.com is the first site for reserving accommodation and booking services that is exclusively dedicated to business tourism. With a presence in major European cities (Paris, Cologne, Hanover, Barcelona, London, etc.), MagicEvent.com offers accommodation in the immediate vicinity of large business centers and convention/exhibition centers.	1	0	1
<b>MakeWorks</b>	"Digital, meet Physical." MakeWorks is Toronto's first shared lab for Startups, Makers and Designers. Everything at MakeWorks is designed around a core principle of "community + innovation = growth," leading towards creating the premier workspace for technologists and creatives, and providing the tools, mentorship and community for them to thrive.	0	0	1
<b>Marktplaats</b>		0	0	1

<b>Name</b>	<b>Description</b>	<b>Tra vel</b>	<b>Trans port</b>	<b>Leis ure</b>
<b>Mass Mosaic</b>	Mass Mosaic is a website that finds exchange matches with your friends, groups and community! We create an ecosystem for exchange where you can access anything "on demand."	0	0	1
<b>Meerijden</b>		0	1	0
<b>Meetmeals</b>		0	0	1
<b>mejorenbici</b>		0	1	0
<b>Melbourne Bike Share</b>		0	1	0
<b>Meloprestas</b>		0	0	1
<b>Miet24</b>		0	1	0
<b>MinbilDinbil</b>	MinbilDinbil is the leading person-to-person car sharing platform in Denmark. We allow our wide network of car owners to rent their vehicles at an affordable price to other people who need a car. MinbilDinbil provides a trusted platform, safe transactions and an extra covered insurance to the vehicle for the duration of the rental. Car.	0	1	0
<b>misterbnb</b>		1	0	0
<b>mobilicidade</b>		0	1	0
<b>Mobility</b>		0	1	0
<b>Modo</b>		0	1	0
<b>Move About</b>		0	1	0
<b>moving</b>		1	0	0
<b>Moving2you</b>		1	0	1
<b>MovingWorlds</b>	The Global Experteering Network – Find the best place to volunteer your skills, anywhere you want to travel.	1	0	1
<b>MovoMovo</b>		0	1	0
<b>Mutuo.cc</b>		0	0	1
<b>my recycles stuff</b>		0	0	1
<b>My Ride Buddy</b>		0	1	0
<b>myDogBuddy</b>	Peer-to-peer marketplace for home dog boarding and other dog services, connecting dog owners with trusted and insured dog sitters in your local area.	0	0	1
<b>MyNeighbor</b>	MyNeighbor is a neighborhood based mobile-centric marketplace for the borrowing and lending of goods and services that saves borrowers money and time while making money for the lender and/or their preferred charity. Think of us as the AirBnB for your neighborly needs & deeds.	0	0	1
<b>MyNewly.com</b>	Create a honeymoon registry to which your family and friends can contribute to your honeymoon flight, hotel, tours and activities!	1	0	1
<b>MyReal Trip</b>		1	0	1
<b>MyTwinPlace</b>	MyTwinPlace is a home swapping community for vacation rental owners and travellers enabling them to get FREE accommodation around the world by exchanging their homes with other trusted host members in just 1 click!	1	0	0
<b>MyWheels</b>	Rent a car in the neighbourhood or rent your own car. MyWheels is the most affordable way to share a car.	0	1	0

<b>Name</b>	<b>Description</b>	<b>Tra vel</b>	<b>Trans port</b>	<b>Leis ure</b>
<b>Nachbarschaftsauto</b>		0	1	0
<b>Nautical Monkey</b>		0	1	1
<b>Nbici</b>		0	1	0
<b>Neeboz</b>	Neeboz brings the remarkable skills and resources of a neighbourhood together. The platform assists local bartering; allowing Neebozers to earn UCreate credits to get what they need in return for offering their skills, the not-so-obvious things they can do and by lending out or trading their belongings.	0	1	1
<b>Neighborgoods</b>		0	0	1
<b>Neighborrow</b>		0	0	1
<b>nextdoor</b>		0	0	1
<b>Nexus Car Share</b>		0	1	0
<b>Nice Ride</b>		0	1	0
<b>Nomador</b>	Nomador is an international house-sitting community. It helps homeowners get in contact with house-sitters and make arrangements for their homes to be "sat" while they travel. House sitters can travel to new destinations all around the world, immersing themselves in a different culture, and for free.	1	0	1
<b>Nuride</b>		0	1	0
<b>OliveTrips</b>		0	1	0
<b>OLX</b>		0	0	1
<b>OneFineStay</b>		1	0	0
<b>Oodle</b>		0	0	1
<b>OpenShed</b>		0	0	1
<b>Orix Auto</b>		0	1	0
<b>Outpost</b>	Zilyo is the world's top vacation rental search site with currently over 2 million listings in more than 50,000 destinations around the globe. We return results for short term rentals ranging from apartments, houses, cottages, villas, castles, and even igloos, from all over the world.	1	1	1
<b>OV-fiets</b>	OV-bicycle is the easy rental bike for the last part of your trip. If you arrive by train at the station, you can rent quickly a public bike to ride to your appointment.	0	1	0
<b>Pack Out Gear</b>	Camping just got easier! Pack Out Gear offers rentals of leading outdoor equipment – tents, backpacks, sleeping bags, etc. Gear selections and rentals periods are made at <a href="http://www.packoutgear.com">www.packoutgear.com</a> . Orders are then shipped directly to customers and include prepaid return postage. Get outside and explore!	0	0	1
<b>Packmule</b>		0	0	1
<b>Panjo</b>	Panjo is a recommerce marketplace for auto, sport, and hobby enthusiasts.	0	0	1
<b>ParkFlyRent</b>	ParkFlyRent, the social way to park & rent. Park your car for free at the airport, rent it out and fly.	0	1	0
<b>Parkit</b>		0	1	0
<b>ParkMyVan</b>		0	1	0
<b>Parkplatzking UG</b>	Parkplatzsharing und günstige Parkplätze an Flughäfen und in Städten.	0	0	1



<b>Name</b>	<b>Description</b>	<b>Tra vel</b>	<b>Trans port</b>	<b>Leis ure</b>
<b>Parku</b>		0	1	0
<b>PassItOn</b>		0	0	1
<b>PATS Carshare</b>		0	1	0
<b>Pendlernetz</b>		0	1	0
<b>Petsodia.com</b>	Get a pet-lover to take care of your pets while you are away from home, rather just put them in a cold, abandoned cage in a commercialized kennel!	0	0	1
<b>peuplade</b>		0	0	1
<b>PhillyCarShare</b>		0	1	0
<b>Pogoride</b>		0	1	0
<b>Ppdai</b>		0	0	1
<b>Private Sea (UK)</b>		0	1	1
<b>Propaloo</b>		1	0	1
<b>Publibike</b>		0	1	1
<b>PucaTrade</b>	PucaTrade is a free trading marketplace for Magic the Gathering (MtG) players and collectors. Our mission is to make MtG more financially accessible to people of all socio-economic statuses, and we do so by offering our PucaValue Pricing Index, Auto-Matching Trade Service, and 100% Trade Guarantee to our site members, for free.	0	0	1
<b>Q-Flea (US)</b>		0	0	1
<b>Qraft</b>		0	0	1
<b>Quikr</b>		0	0	1
<b>Really Really Free Market (RRFM)</b>		0	0	1
<b>recupe</b>		0	0	1
<b>Rede dos livros</b>	Share and rent books. Transform your own books into a source of income.	0	0	1
<b>RelayRides</b>		0	1	0
<b>Rent And Share</b>		0	1	0
<b>Rent Charlie</b>		0	0	1
<b>Rent N Roll P2P car sharing</b>		0	0	1
<b>Rentabilities</b>		0	0	1
<b>Rentabox</b>		0	0	1
<b>RentalCompare</b>		0	0	1
<b>Rentallic</b>		0	0	1
<b>RentALocalFriend</b>		1	0	0
<b>Renterval</b>		0	0	1
<b>RentHackr</b>	RentHackr is a future marketplace for apartments with data provided by renters.	1	0	0
<b>Renting Point</b>		0	0	1

<b>Name</b>	<b>Description</b>	<b>Tra vel</b>	<b>Trans port</b>	<b>Leis ure</b>
<b>Rentipid.com</b>	Rentipid.com is an online marketplace (first in the Philippines) for Online Peer-to-Peer Rentals. It allows people with available stuff to post their items for rent and allows other people to find items they need for a short period of time. Enables Earning on the side of Owner and Savings on the side of Renter	0	0	1
<b>Rentmineonline (USA)</b>		0	0	1
<b>Rentoid</b>		0	0	1
<b>RentStuff</b>		0	0	1
<b>rentwant</b>		0	0	1
<b>Repair Cafe Toronto</b>	Repair Cafe Toronto is a monthly community event that matches community volunteers who have repair knowledge with those seeking to fix a household item, and in doing so fosters a sense of community while combatting throwaway culture.	0	0	1
<b>Respiro</b>		0	1	0
<b>ReUseIt Network (RIN)</b>		0	0	1
<b>Reward Ride</b>		0	1	0
<b>Ride4cents (Europe)</b>		0	1	0
<b>Ridebliss</b>	Ridebliss.com is Nigeria's trusted social ride sharing, car sharing community website that makes everyday commute faster, cheaper and cleaner across Nigerian cities. Membership is free. It's currently in public beta. Ridebliss promotes collaborative consumption and hopes to bring back the fun in driving with a social tweak to it.	0	1	0
<b>ridefrog</b>		0	1	0
<b>rideIT Carpool</b>	rideIT is an inter-company carpool matching service exclusively for working professionals.	0	1	0
<b>Ridejoy</b>		0	1	0
<b>Ridepal</b>		0	1	0
<b>RidePost</b>		0	1	0
<b>Rides</b>		0	1	0
<b>RideScout</b>		0	1	0
<b>Ridester</b>		0	1	0
<b>RideSurfer</b>		0	1	0
<b>Ridingo</b>	Ridingo is an app and website for carpooling. It helps people find cars or riders based on the route and timing. To ensure safety, it verifies every members and allowed only working professional from known organisations are given membership. As a form of payment for car owners / riders, it has an online rewards system.	0	1	0
<b>Riparide</b>		0	0	1
<b>RipeNear.Me</b>		0	0	1
<b>Roomlala</b>	We're your peer-to-peer room rental specialist! Let us help you find your next accommodation or tenant today!	1	0	1
<b>Roomorama</b>		1	0	0
<b>Sailbox</b>		0	0	1

<b>Name</b>	<b>Description</b>	<b>Tra vel</b>	<b>Trans port</b>	<b>Leis ure</b>
<b>sailsquare</b>	Sailsquare is a peer-to-peer marketplace for sailing holidays, and a community of sea lovers too. Our mission is to make sailing holidays a unique experience, accessible to anyone, enabling the sharing of experiences among people from all over the world.	0	1	0
<b>Samba (Rio de Janeiro)</b>		0	1	0
<b>Samenrijden</b>		0	1	0
<b>Scoot Networks</b>		0	1	0
<b>Scoville</b>		0	0	1
<b>Seats 2 Meet</b>		0	1	0
<b>SecretWardrobe</b>		0	0	1
<b>Secure Carpool</b>		0	1	0
<b>Sevici (Seville, Spain)</b>		0	1	0
<b>Share My Fare</b>		0	1	0
<b>Share Some Sugar</b>		0	0	1
<b>Share Your Ride (Australia, Belgium, Brazil, Canada, France, Mexico, USA)</b>		0	1	0
<b>Sharebox</b>		0	0	1
<b>Sharely</b>	Real sharing, social renting & social funding with friends, neighbours & organizations – at home and travelling	1	0	1
<b>Sharemob.co</b>	The P2P community that helps you buy from amazing people near you. All things handmade. Vintage. Accommodations. Service experts. Homegrown produce. Finally are all reunited in one single place. Sharemob enables people all over the world to share in the physical world, on a larger scale than ever before possible. Join the mob!	0	0	1
<b>ShareMyFare Inc</b>	ShareMyFare saves you money by helping you meet up with the like-minded people to share your ride and the fare. Anywhere, Anytime. For FREE. We are aspiring to be the 1st truly global ride-sharing service. We will transform the way people will travel by enabling anyone willing to share a ride to find a ride-buddy.	0	1	0
<b>ShareShed</b>		0	0	1
<b>ShareTribe</b>		0	0	1
<b>Sharoo</b>		0	1	0
<b>Shipizy</b>	Shipizy is a trusted community marketplace that connects travelers with people with shipping needs anywhere in the world. It's a fast and easy process that offers an alternative to typical shipping companies by connecting people that want to send or bring something to travelers who are going that way anyway and are willing to carry peers.	0	0	1
<b>Shiroube</b>		1	0	1
<b>SideCar</b>		0	1	0
<b>Sidetour</b>		1	0	1
<b>Sincropool</b>		0	1	0

<b>Name</b>	<b>Description</b>	<b>Tra vel</b>	<b>Trans port</b>	<b>Leis ure</b>
<b>Six Dinners Later</b>		0	0	1
<b>Skjutsgruppen</b>		0	1	0
<b>SlingRide</b>		0	1	0
<b>Sloepdelen</b>	Rent a boat, start it, drive off and sail with your friends, relax through the canals of Amsterdam.	0	1	1
<b>Smart Yacht (Global)</b>		0	0	1
<b>SnappCar</b>		0	1	0
<b>SoCar</b>		0	1	0
<b>Social Bicycles</b>		0	1	0
<b>Social Car</b>		0	1	0
<b>SocialCar</b>	SocialCar is the first peer to peer car rental service operating in Spain. It allows car owners to make some extra cash out of their underutilized cars by renting them to neighbours or travellers who occasionally need a car.	0	1	0
<b>sowetrip</b>		0	0	1
<b>Sprzedajemy</b>		0	1	0
<b>Spullendelen</b>		0	0	1
<b>Stadtmobil</b>		0	1	0
<b>StartupStay</b>	Forever change how you travel for your startup	0	0	1
<b>Stattauto</b>		0	1	0
<b>Stockholm City Bikes</b>		0	1	0
<b>SunFleet</b>		0	1	0
<b>SupperShare</b>	SupperShare's online platform features host's home kitchens with a selection of delicious dining options that guests can request with times that work for them or grab a seat on a specific date. Hosts select the number of seats available, set a price per seat and create meals to share with the SupperShare community.	0	0	1
<b>Swap Aspen</b>		0	0	1
<b>Swap Treasures</b>		0	0	1
<b>Swap-Online</b>		0	0	1
<b>SwapAce</b>		0	0	1
<b>SwapDen</b>		0	0	1
<b>SwapMe Sports</b>		0	0	1
<b>Swapy</b>		0	0	1
<b>taap</b>		0	0	1
<b>Tamyca</b>		0	1	0
<b>Taxistop</b>		0	1	0
<b>Tel O Fun</b>		0	1	0
<b>The Bike Kitchen (Bay Area)</b>		0	1	0
<b>The Borrowers</b>		0	0	1
<b>The Hire Hub</b>		0	0	1

<b>Name</b>	<b>Description</b>	<b>Tra vel</b>	<b>Trans port</b>	<b>Leis ure</b>
<b>The Ski Swap</b>		0	0	1
<b>The Swap Team</b>		0	0	1
<b>Thumb Tack</b>		0	0	1
<b>Tickengo</b>		0	1	0
<b>Ticketbis</b>	Ticketbis is an online platform where anyone can securely buy or sell tickets for all types of events. The website offers more than one million tickets for international events and makes it easy to attend events all over the world. Within Ticketbis, every user can buy and sell tickets in a secure, guaranteed and easy way.	0	0	1
<b>TIMECAR</b>		0	1	0
<b>Toogethr</b>		0	1	0
<b>tooxme</b>		0	1	0
<b>Tour Coin</b>	Tour Coin is a virtual currency created to provide the exchange of authentic travel experiences.	0	0	1
<b>Touristlink</b>	No matter where you're going, Touristlink gives you opportunity to get a real feel of the culture. Meet up with a local for a coffee or beer, find travel companions to share the journey. Touristlink makes it easy to arrange your trip directly with the person organizing it rather than a travel agent reselling it.	1	0	1
<b>Trablr</b>		0	0	1
<b>Transfercar</b>	Transfercar is an online relocation service that offers free use of rental cars to travellers. In return the travellers are helping the rental car industry to relocate their cars in a cheaper way than any current relocation alternative.	0	1	0
<b>trashnothing</b>		0	0	1
<b>Trenhub</b>		1	1	1
<b>Trip4real</b>	Trip4real is a community-driven platform connecting locals with travellers all over Spain. Our p2p network enables locals to become tour guides in whatever they are passionate about, and travellers to Spain to browse through thousands of their offerings. Founded in 2012 the platform was created as a tool to help people traveling to Spain.	1	0	1
<b>Tripda</b>	Tripda is a carpooling platform that connects drivers travelling or commuting with empty seats in their cars and passengers heading the same way. Founded in Brazil in 2014 by entrepreneurs passionate about sharing economy and backed by Rocket Internet, the company is already operating in 10 countries, helping thousands of people to travel more.	0	1	0
<b>Tripid</b>		0	1	0
<b>Tripmeo</b>	Tripmeo is a travel website for those who want seeing the world through the eyes of locals... With Tripmeo, you can: -Easily book someone's house, apartment or room -Share a dinner in someone's house and enjoy the true local taste... -Discover new experiences in their destinations by connecting with local people and book tours.	1	0	1
<b>Tripping</b>		1	0	0
<b>TuShare</b>		0	0	1

<b>Name</b>	<b>Description</b>	<b>Tra vel</b>	<b>Trans port</b>	<b>Leis ure</b>
<b>Uber</b>		0	1	0
<b>ubokia</b>		0	0	1
<b>une voiture a louer</b>		0	1	0
<b>Uniiverse</b>		0	0	1
<b>untash</b>		0	0	1
<b>Urban Bellhop</b>		0	0	1
<b>Urbanbellhop</b>		1	0	0
<b>UseTogether</b>		0	0	1
<b>Utavi</b>		0	0	1
<b>vadrouille covoiturage</b>		0	1	0
<b>Vayable</b>		1	0	1
<b>VEL'Ok (Luxembourg)</b>		0	1	0
<b>Velib</b>		0	1	0
<b>Velo Bleu (Nice)</b>		0	1	0
<b>Velo'v (Lyon, France)</b>		0	1	0
<b>Velocea (Cannes)</b>		0	1	0
<b>Velogistics</b>		0	1	0
<b>Velolet</b>		0	1	0
<b>Velomagg (Montpellier, France)</b>		0	1	0
<b>Velopop (Avignon)</b>		0	1	0
<b>Villavenner</b>	villavenner.dk is a website where you can share things, help, interests and events with people in your neighborhood.	0	0	1
<b>ville fluide</b>		0	1	0
<b>Villo!(Brussels, Belgium)</b>		0	1	0
<b>VoitureLib</b>		0	1	0
<b>WeCar</b>		0	1	0
<b>Weeels</b>		0	1	0
<b>Wego</b>		0	1	0
<b>Weroll</b>	Better commuting. 100% Free Carpooling: Connect with friends and coworkers.	0	1	0
<b>Wheelz</b>		0	1	0
<b>Whipcar</b>		0	1	0
<b>Whizz Car</b>		0	1	0
<b>WunderCar</b>	WunderCar is headquartered in Hamburg, Germany and recently entered the Dublin, Ireland market (first market outside <a href="http://www.wundercar.org/en/WunderCar">http://www.wundercar.org/en/WunderCar</a> is a novel approach to urban mobility. Made to fit your needs. Jump in and share the lift!Germany).	0	1	0
<b>Wymiennik</b>		0	0	1
<b>Yacht Plus</b>		0	0	1

<b>Name</b>	<b>Description</b>	<b>Tra vel</b>	<b>Trans port</b>	<b>Leis ure</b>
<b>Yachtly</b>	Yachtly links crew seeking passage with boat skippers needing crew. Yachtly is a p2p disruptive company within the global sharing economy. Before weighing anchor on a stranger's boat, Yachtly members can browse the profiles of both crew and skippers who have been rated by others on many aspects relevant to a voyage.	0	1	1
<b>yolyola</b>		0	1	1
<b>yRides</b>		0	1	0
<b>Zagster</b>	Zagster is bike sharing for everyone. We design, build, and operate private bike sharing programs for universities, corporate campuses, hotels, and residential communities across the United States. Zagster provides customers a complete bike sharing solution – including system design, installation, sharing technology, maintenance, rider support, and marketing services.	0	1	1
<b>Zazcar</b>		0	1	0
<b>Zen Car</b>		0	1	0
<b>Zimride</b>		0	1	0
<b>Zipcar</b>		0	1	0
<b>Zoomcar</b>	India's only car rental company focusing exclusively on self-drive. Zoom off in Bangalore, Gurgaon and Pune!	0	1	0
<b>Zotwheels</b>		0	1	0

**Source:** (collaborativeconsumption, 2015)







DIRECTORATE-GENERAL FOR INTERNAL POLICIES

## POLICY DEPARTMENT **B** STRUCTURAL AND COHESION POLICIES

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