



Collaborative economy

**Economic development and
regulatory environment**

DG GROW/E3

Luxembourg, 6 December 2017

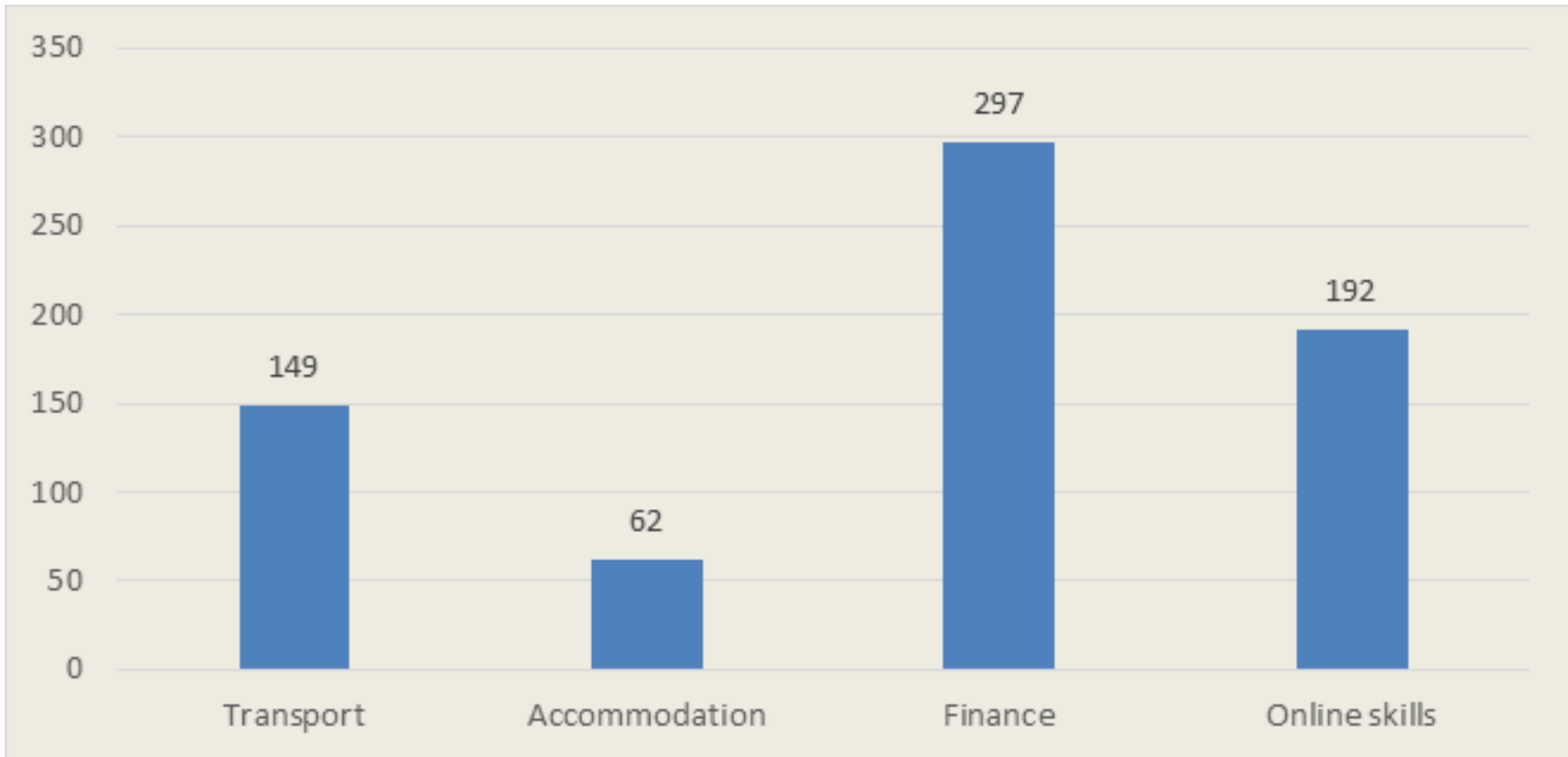
Working definition

- Temporary usage of service or assets.
- No exchange of ownership.
- Transactions facilitated by a digital platform or marketplace.
- Participants: C2C or C2B.

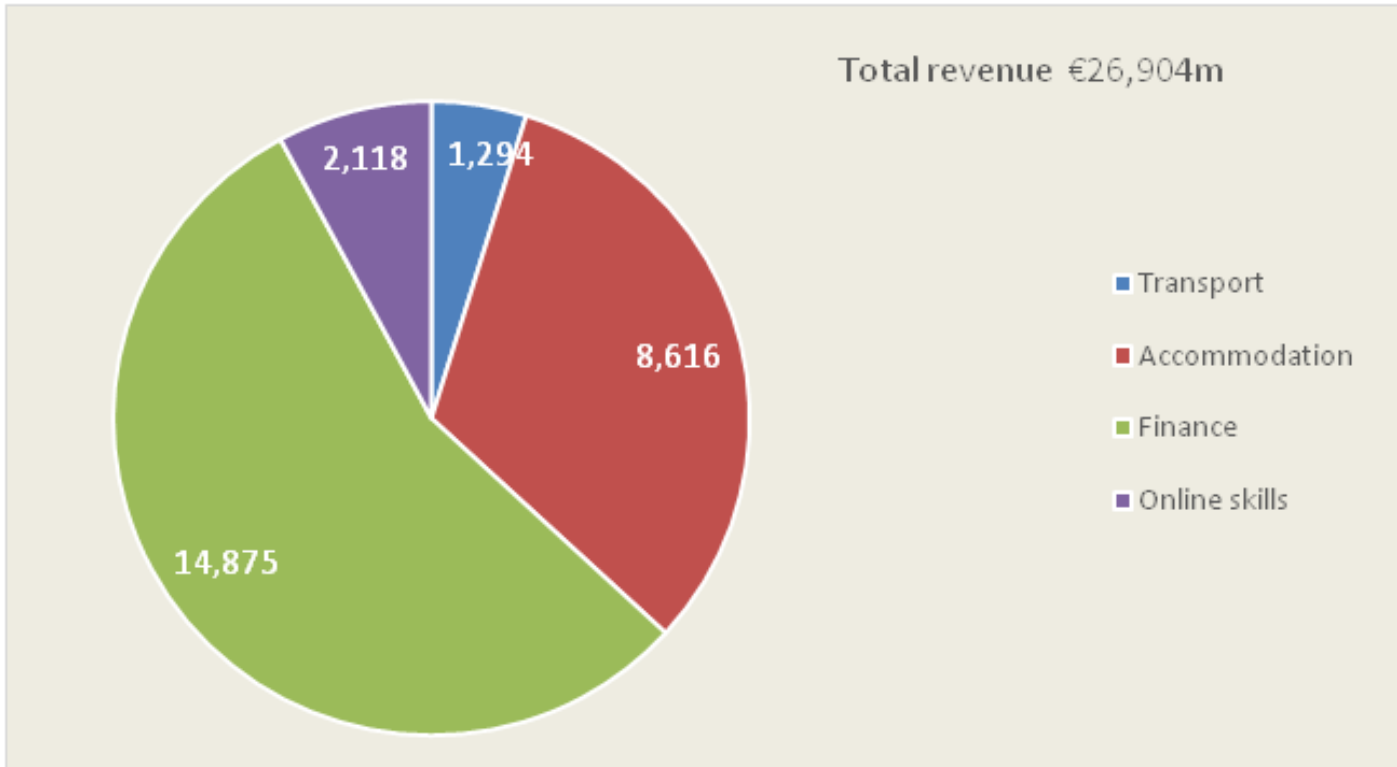
Measuring the economic size of the collaborative economy

- No official data available on collaborative platforms.
- Catalogue all platforms based on working definition
- Carry out a survey of platforms and desk research to gather/estimate revenue data for a subset of platforms.
- Gather statistics on number of platform visits/hits for all platforms.
- Calculate ratio of revenue data with platform hits for the subset.
- Apply the ratio to remainder of platforms.
- Estimate provider revenues from platform revenues using known rates of commission.

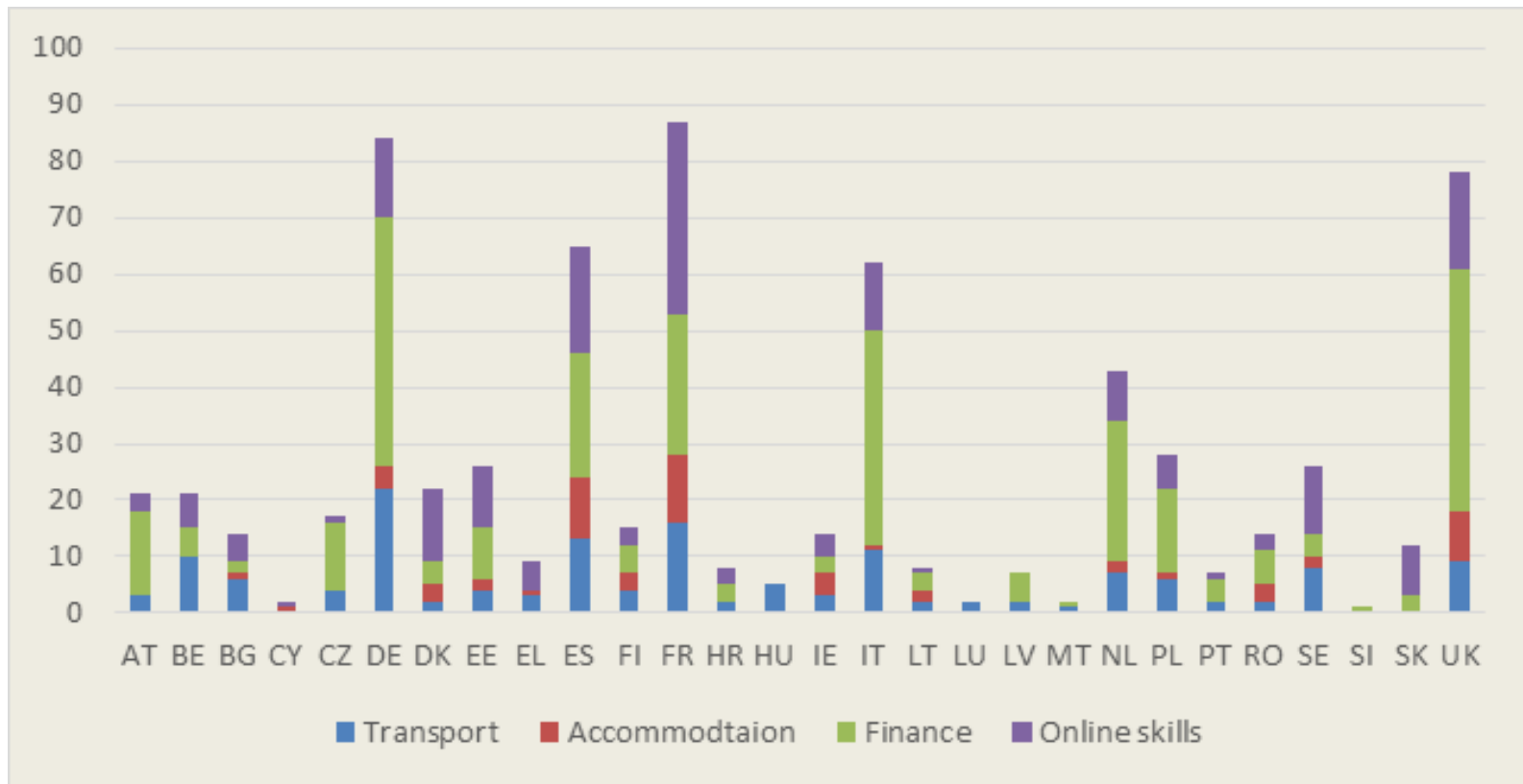
Collaborative economy platforms by sector in the EU (2017)



Revenues (2017)– platforms and providers



Collaborative economy platforms in EU MS (2017)



Employment

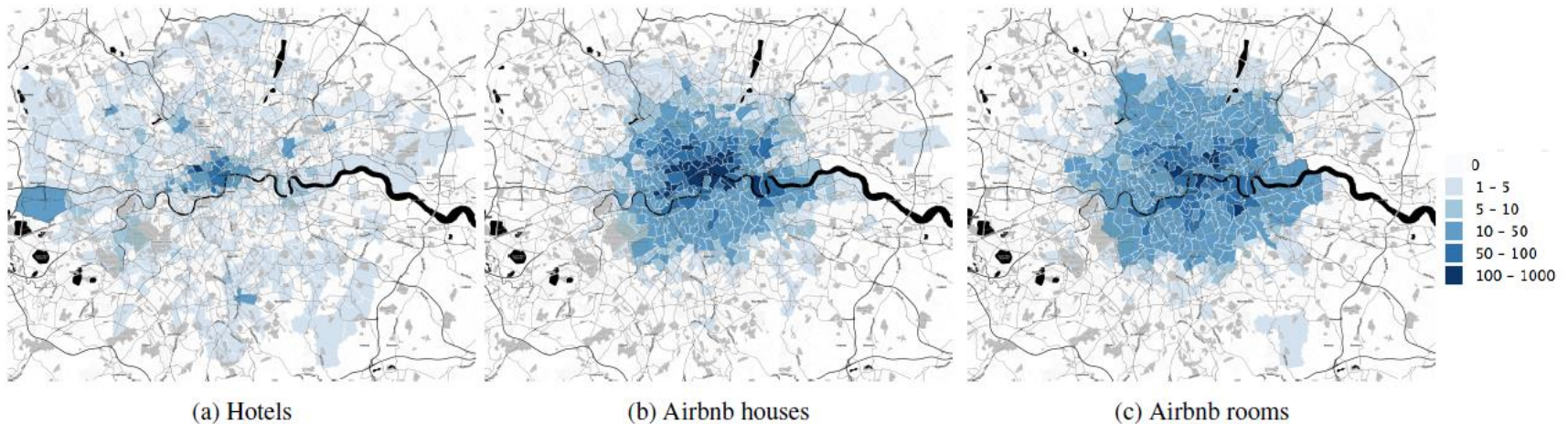
- *Created around four hundred thousand jobs in the EU (FTE).*
- *Mainly flexible part-time work.*
- *In-line with longer-running trend of more part-time, flexible employment in the EU.*
- *The structural effect is still marginal. (In the US, there is a counter-trend toward more permanent employment in the labour market as a whole.)*

Drivers: digitalisation

	Internet access (% of households)	Broadband access (% of households)	Internet usage in the last three months (% of individuals)	e-commerce usage in the last three months (% of individuals)	Internet usage via mobile phone or smart phone (% of individuals)
Luxembourg	97	95	97	63	73
Netherlands	96	94	93	59	71
Denmark	92	84	96	67	75
Sweden	91	83	91	56	74
UK	91	90	92	75	73
Finland	90	90	93	50	69
Germany	90	88	88	64	57
Estonia	88	87	88	46	55
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Poland	76	71	68	24	34
Italy	75	74	66	18	25
Cyprus	71	71	72	19	55
Portugal	70	69	69	23	41
Greece	68	67	67	24	38
Lithuania	68	67	71	22	36
Romania	68	65	56	8	31
Bulgaria	59	59	57	12	34

Source: Staff Working Document, Communication on a European Agenda for the collaborative economy (2016)

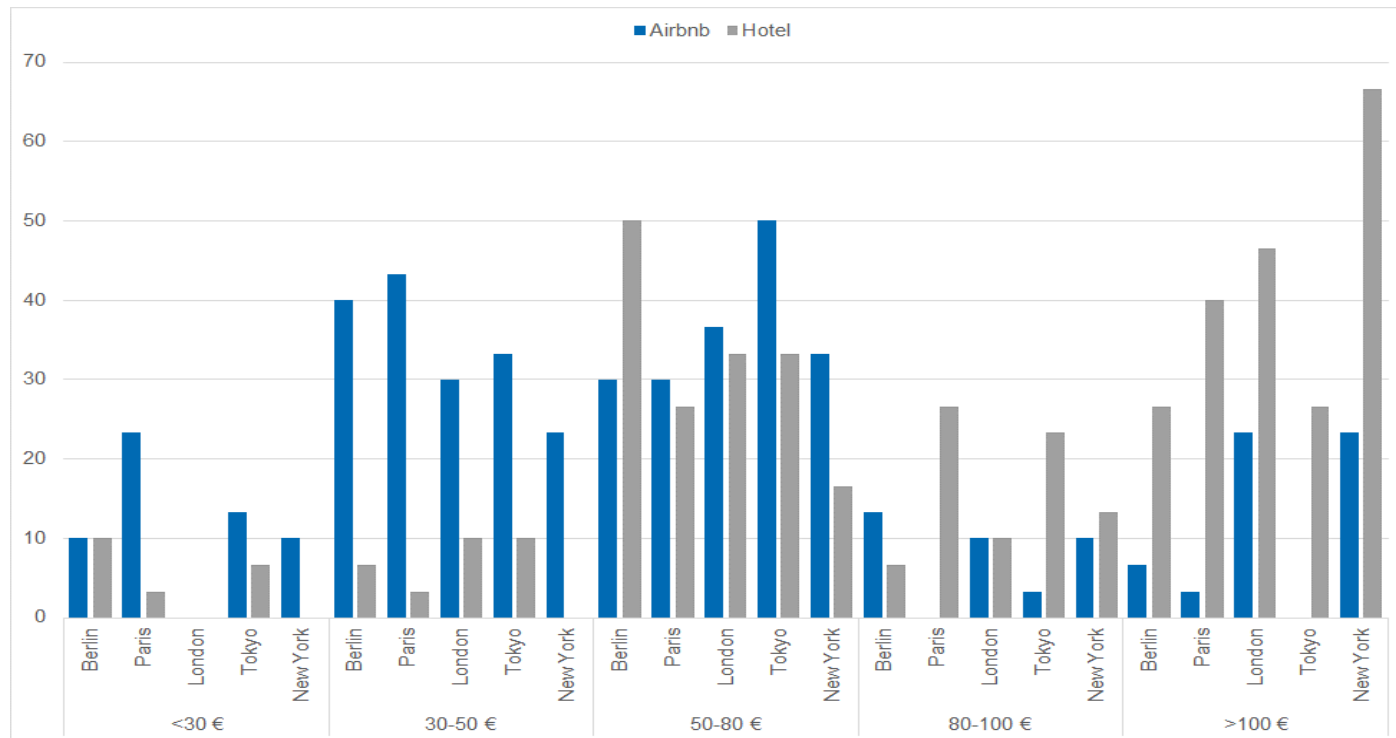
Drivers – greater consumer choice



Heat map of properties listed on Airbnb in London

(Quattrone et al, 2015)

Drivers – lower prices



Other potential drivers

- *Urbanisation*
 - Urban migration created the potential for peer-to-peer services markets.
- *Post-2008 economic climate*
 - less full-time employment, weak wage growth.

Monitoring framework

- *Indicator(s) on each MS to be included in the Single Market Scoreboard*
- *Assessing aspects of the business and regulatory environment which affect the collaborative economy.*
- *Monitoring framework will cover all MS and several services sectors.*
- *Covering themes such as ability to provide labour, services and facilitating the payment of taxation.*
- *Will include dedicated studies, workshops and expert groups.*
- *Economic development*
 - Growth, employment, etc.
- *Regulatory environment*
 - level of market access requirements, ease of providing labour/skills, public administration, etc.

Measuring the regulatory environment of the collaborative economy

Policy objective:	Promote the balanced development of the collaborative economy
Specific Objective:	Develop an index of the regulatory environment like the WB Doing Business index
Definition:	C2C or C2B, digital platform based services
Themes:	Six themes: (vertical) transport, accommodation, finance, (horizontal) public administration, business support, alignment
Output:	Single market scoreboard
Schedule:	Publication in summer 2018