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2021

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MPRA Paper No. 110226, posted 21 Oct 2021 13:31 UTC

Citation: Höfner, Malte, and Rainer Rosegger. 2021. "Country Report on the Collaborative Economy in Austria." In *The Collaborative Economy in Action: European Perspectives*, edited by Andrzej Klimczuk, Vida Česnuitytė, and Gabriela Avram, 35–51. Limerick, Ireland: University of Limerick.

Country Report on the Collaborative Economy in Austria

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Abstract

Collaborative economies (hereinafter named CE) are business models whose activities have their origins in the use of digital platforms. There, shared consumption is practised in various forms of peers with either profit or non-for-profit outcomes. By means of several EU-wide studies, this report takes a closer look at the CE in Austria. Apart from the accommodation sector (national economic importance of tourism), Austria presents an EU-below average use of services offered on sharing platforms. Examples portray a field of tension from activities of low-threshold initiatives at the local level to capital-oriented actors. Such global players (Airbnb) have established themselves (in) the sharing economy and now represent a lot of challenges impacting the state regulatory systems and domestic market participants nationally. Thus, Austria is currently dealing with questions of regulation and tax legislation of CE. Looking at national CE initiatives, the capital region of Vienna is at the forefront of consolidation while omitting the majority of Austrians living in rural regions. Further research is needed to raise questions about law challenges, to address the strong tendencies of precarisation of service work, evoked by sharing platforms, to face the current constraints in managing this vigorous dynamic of economic transformation processes.

Keywords: Collaborative Economy, Shared Consumption, Sharing Economy, Platform Capitalism, Legal Regulations, (Non-)For-Profit Sharing, Fair Economy

Introduction

As in numerous other countries, at present, Austria is intensively engaged in questions of regulation and tax legislation in the area of collaborative and platform economy. Local legislation is sometimes initiated in strong tourist destinations. National regulation is planned for 2020. Overall, the relevance of the collaborative economy lies within the European average with strong growth potential. A comparison of European countries shows that the number of domestic platforms operating is below average. Some position papers discuss the impact on traditional economic structures and call for a transition from share to a fair economy.

Starting with some definitional issues and national data, a second part of the country report covers the key questions on how collaborative economy is concerned in Austria, outlining a concise summary of surveys and studies in this field. Examples follow to depict the national players of the affected sectors. The report concludes by giving a short glimpse of current research projects.

Definition

The environment of the economy of sharing is surrounded by multi-sited user exchanges, relationships, and a vast number of intermediary entanglements. For that reason scientific understandings vary from each other. The big players' activities of these new markets are predominantly based on digital technologies and service delivery and cannot be easily attributed to a single source and accordingly lack a single definition (Richardson 2018: 200f, Botsman 2013). While the European Commission refers to the term "collaborative economy" (hereinafter referred to as CE), myriads of other words exist when conceptualising the CE. To name just a few, the sharing economy, platform economy, on-demand economy, peer-to-peer economy, and collaborative consumption are frequently used buzzwords in the current debate. In contrast to other authors, Hamari et al. (2016: 2047) write that in the CE, access to goods or services is shared between consumers via online platforms. Since the practice of sharing is generally not a new (economic) phenomenon, digital platforms have changed sharing tremendously. While the "analogue" sharing was based on the traditional constellation between consumer and provider (spatially fixed), digital sharing through platforms became a lot more complex. The intermediary (platform) constitutes (decentralised) participation of a number of different actors (usually three) and is spatially unbounded, why many sharing activities nowadays entail impacts on a global level too. The essential change through the existence of platforms is identified in the so-called "stranger sharing." In contrast to traditional sharing practices within a family or between friends, "today's sharing platforms facilitate sharing among people who do not know each other, and who lack friends or connections in common. Stranger sharing consequently entails a higher degree of risk (...). The digital platforms are able to make stranger sharing less risky and more appealing because they source information on users via the use of ratings and reputations" (Frenken and Schor 2017: 4).

According to Naumanen et al. (2018: 15), "the term collaborative economy refers to business models where activities are facilitated by collaborative platforms that create an open marketplace for the temporary usage of goods or services often provided by private individuals. (...) Collaborative economy transactions generally do not involve a change of ownership and can be carried out for-profit or not-for-profit."

Structurally systematising the CE, two distinctive aspects of economic activity are of crucial importance:

First, the CE involves three distinct groups of actors (Petropoulos 2017: 4f; Hagen and Rückert-John 2016: 8):

- 1) Swapping and sharing between individuals on an occasional basis—understood as peer-to-peer sharing (P2P or C2C: consumer-to-consumer, e.g., Couchsurfing, BlaBlaCar).
- 2) Business models of companies to their customers (B2C: business-to-customer).
- 3) Business-to-business models (B2B: through collaborative platforms as intermediaries).

Second, platforms intend to provide short-term access to previously underutilised resources or physical assets (known as “idle capacity” or “overcapacity”), possibly for money (Frenken et al. 2015 after Petropoulos 2017: 2f). Besides the nature of the shareable good (e.g., consumption goods such as homes, cars, tools, but also services, finance, and knowledge), the CE can also be subdivided sectoral according to its fields in need of daily consumption (Hagen and Rückert-John 2016: 8). Usually, the four big consumption realms of accommodation, transportation, online labour markets and finance can be identified. In the recent study commissioned by the City of Vienna, Antalovsky et al. (2015) have extended the four realms to the area of food as a separate field of consumption, whereas the online labour markets for Austria have been subdivided into the two spheres of fashion and cleaning services by them too (Antalovsky et al. 2015: 5). The European Commission assigned the platforms on CE in four sectors: 1) transport, 2) accommodation, 3) finance, and 4) online skills (Naumanen et al. 2018: 9).

According to the “Flash Eurobarometer Report on the Use of the Collaborative Economy”—a survey conducted by the European Commission (2018: 1 (factsheet Austria))—the most used services can be found in the sectors of accommodation transport and food-related services. Apart from the sector of accommodation, which can get in touch with the economic relevance of tourism in Austria, almost all other sectors show an under-average usage of services offered through collaborative platforms in the European Union. The share of people who never used a service offered via a collaborative platform is relatively high in Austria (80%). Taking other survey-related data into account, the Austrian user behaviour can possibly best be explained by concerns about sharing personal data. Countries that are largely dissuaded from using collaborative platforms because of personal data issues are Germany (28%), France (27%), Spain (27%), Austria (26%), and Portugal (26%) (European Commission 2018: 52). This picture can be underlined by an overall lack of technical knowledge using collaborative platforms. Additionally, in Austria, more than one-third (35%) identifies their non-provisioning in collaborative platforms to the lack of trust in the online booking or payment process, followed by further reasons such as the unclear or complicated legal framework of provisioning services, complicated tax systems, as well as the unclear impact that providing services on collaborative platforms might have on ones (personal) employment status (European Commission 2018: 78). The exorbitant price increase in Austrian properties since the entry of platforms such as Airbnb asks for new regulatory measures at the state-level and forces municipalities to proactively limit the use of private homes as tourist accommodations in order not to further harm the common hospitality sector (Naumanen et al. 2018: 77f).

A German study on interlinked consumption through peer-to-peer-sharing (Behrendt et al. 2017) has added media and commodities (articles of daily uses) as separate fields of consumption. According to this study—which can be seen similarly to the Austrian context—36% of the platforms represent the sphere of mobility, 28% commodities (articles of daily use) and 18% in accommodation. Only 18% was attributable to the remaining fields of fashion, media, and food. The overall total number of the active peer-to-peer platforms that have been detected in Germany was (n=110), from six of them (5%) were founded in Austria (IÖW, IZT, IFEU 2017).

Shared consumption is practised in different forms. On the one hand, it involves practices that prolong the long-term use of a good—for instance, by reselling, giving away or swapping. On the other hand, there are practices that aim for more intensive use—through co-using (concurrent sharing), lending, leasing, renting, or streaming (possible “rebound effects”). Examples show that many platforms allow multiple sharing practices simultaneously. For instance, through Airbnb, mainly whole apartments are rented, but at the same time, there is also the possibility of co-use by providing individual rooms in an apartment in the coeval presence of the property owner (Flick and Henseling 2019: 17). Following the study from Behrendt et al. (2017, IÖW, IZT, IFEU 2017), the dominating practice of sharing/consuming is the so-called “Co-Using” (offered by 30% of all platforms). Renting or leasing is represented by 27%, and the reselling or exchanging of used products correspond to 14% in each case, whereas gifting (8%) and the free of charge lending (7%) is relatively small in their impact on the CE (Flick and Henseling 2019: 17). This raises critique on why the majority of platform companies do not engage in “real traditional” sharing, but rather hide in a wolf-in-sheep’s-clothing when vindicating exploitation of consumer co-creator in the guise of sharing—often discerningly titled as “share-washing or “pseudo-sharing” (Heiling and Schumich 2018: 21; Belk 2014: 7).

When (economic) collaboration is organized through digital platforms without geographic borders, attention has to be drawn to a lot of legal issues that have to be examined towards the local impact of blurring and unbounded sharing activities. For instance, the demarcation of a private and commercial activity must be answered by politicians and lawyers. While many legal regulations do not apply to the provision of goods or services between private individuals (for example, consumer protection, tax law, labour, and social law), new regulations in certain areas must be considered, as Heiling and Schumich (2016: 2) have rightly pointed out.

Key Questions

The following section provides an overview of how CE is developing in Europe and in Austria in particular. Central studies on this topic will be used for this purpose. In some cases, this involves scientific work, but also project reports, market studies and analyses of the economic sector.

Taking up the definitional circumstances and difficulties from above, Naumanen et al. (2018: 15) also states that “Collaborative economy transactions generally do not involve a change of ownership and can be carried out for-profit (FP) or not-for-profit.” For a better understanding in the Austrian context, Heiling and Schumich (2018) provide a first qualitative overview on the structural body of the Austrian CE based on the “Europa Forum Study” from Antalovsky et al. (2015), which was commissioned by the AK Wien (Vienna Chamber of Labour). This study focuses primarily on the impact

of the sharing and on-demand economy in transport and accommodation. Within just a few years, globally active companies have established themselves in these areas, which, due to their market power, represent a particular challenge for the existing state regulatory systems and existing market participants (Antalovsky et al. 2015: 6).

According to the CE, the study identified two main distinguishing features:

1) Governance and ownership:

Generally, these can be forms of collaboration, such as:

- a) Associations/societies.
- b) Partnerships such as one-man-business/cooperatives.
- c) Corporations such as joint-stock companies/limited companies.

2) Monetary benefit or exchange benefit:

a) Platform models differ in terms of the existence of their cash flow between the participants on the one hand and a “real” swap or barter in the meaning of “good for good” or “service for service” on the other hand (Heiling 2017: 1).

b) Hence, the results of the study indicate that the two criteria can be combined arbitrarily. Just as the demarcation category “for-profit” (FP)/“non-for-profit” (NFP) can be combined with the demarcation category “good/service” at the same time. For instance, it seems possible that a home-sharing provider is designed to be monetary for the users (rent is paid), but the business model itself is not profit-oriented and operated by an association to promote its members (Heiling and Schumich 2018: 23f; Heiling 2017: 2).

Concluding the results of the study, principally everything is possible between capital orientation and the common good in the CE. Especially in the area where platforms provide services, in particular, there is a strong trend towards paid processing and profit-oriented organization by its operators. Platforms that supply work are apparently considered by investors to be particularly promising. This suggests that innovation in the digital age is strongly based on a precarisation of service work and needs to be further investigated regarding legislation (Heiling and Schumich 2016: 2). This needs to be profoundly discussed when striking off new pathways from share to fair economies and contemporary work structures in the current era of digitisation.

EU Report on the Collaborative Economy

In 2016 technopolis group, vva consulting, and trinomics have conducted a study to monitor the economic development of the CE at sector level in the 28 EU Member States instructed by the European Commission. The final report was published in February 2018. The report shows the current level of development also in the four big areas of transport, accommodation, finance, and online skills sectors in all 28 EU Member States (Naumanen et al. 2018: 9).

The level of development of the CE in the EU varies significantly. While the largest CE markets can be found in France (EUR 6.5603 billion (25%)), the UK (EUR 4.6377 billion (17%)), Poland (EUR 2.7366 billion (10%)) and Spain (EUR 2.5243 billion (10%)), the size of the Austrian CE is comparable to the Europe-wide average (EUR 536 million (2%)). The overall market size of the CE in the EU was estimated to be EUR. 26.5 billion, and together with Germany, Italy and Denmark, the latter countries represent about 80% of the total revenues from the CE in the 28 EU Member States in 2016

(Naumanen et al. 2018: 9, 12, 31). With a number of 41 active platforms detected in the country, of which almost half (20) are domestic, Austria can be found in the European average. The biggest share comes from the finance sector (EUR 248 million) and the accommodation sector (EUR 236 million) (Naumanen et al. 2018: 9, 12, 13, 31, 75). The finance sector is the only area ruled by the share of domestic platforms (n=14). In 2016, the accommodation sector lacked any domestic accommodation platform at all (Naumanen et al. 2018: 75). Considering Austria as a well-known tourist destination, this development should be discussed critically in further research. The study conducted by the group of Behrendt et al. (2017) shows a change to the effect of the Start-Up “Reposée” that was founded in 2017 and now seems to be the only domestic player in the sector of accommodation platforms.

In comparison with the other 28 EU Member States, Austria has the highest number of international platforms operating in its country (Naumanen et al. 2018: 69). Austria belongs to the group of Member States that demonstrate a below-average ratio of platforms per 1 million population (2.28) as well as in terms of the contribution of its CE to the national GDP (Austria = 0.15%, EU average = 0.17%). Similar to the EU average, the platforms of Austria’s CE constitute an average share of overall national employment figures, manifested in a contribution to such of 0.15% (Naumanen et al. 2018: 9, 75). The report monitors that the largest number of “active platforms in the Austrian market (in 2016) can be found in the finance sector (n=17) and the online skills sector (n=10)” (Naumanen et al. 2018: 76).

The study estimates approximately 6,700 people working in Austria’s CE in 2016, of which 1.890 (28%) are employed in the finance sector (Naumanen et al. 2018: 76). The biggest share of activities within the collaborative economy in Austria can be attributed to the finance sector, as it far surpasses the sectors of accommodation, transport, and online skills. Interestingly, Austria’s collaborative economy is thus strongly focused on the activities of domestic platforms because the established companies in the financial sector are predominantly Austrian (Naumanen et al. 2018: 76).

The finance sector is mainly occupied by platforms operating in debt funding (43%), the transport sector is dominated by car-sharing and ride-sharing services (57%), and the field of accommodation is mainly represented by rental services and other home-sharing offers (66%), while the online skills sector is exclusively focused on on-demand household services (Naumanen et al. 2018: 76).

PwC: Share Economy 2017: The New Business Model

In 2018, PricewaterhouseCoopers published a study on the sharing economy for six European countries. The study examined the size, characteristics, acceptance, and development of the sharing economy for Austria, Belgium, Germany, the Netherlands, Switzerland, and Turkey. The consulting company is thus reacting to the increasing importance of this (relatively) new economic form but would also like to provide more well-founded information for this economic sector, according to its own statements. A total of 4,500 consumers were surveyed in the six countries in the summer of 2017. Overall, the survey results underline the importance of the CE in all countries surveyed. A total of 44% of the respondents stated that they had used “sharing economy” services in the 12 months prior to the survey (PwC 2018: 9). In Austria, this figure is slightly above the average at 47%. In terms of expenditure per user, however, at 599 EUR, Austria is the penultimate country ahead of the Netherlands (506 EUR). In the first place is Turkey, with 1,031 EUR expenditure per user. In addition, Austria is

predicted to see a decrease in this expenditure next year with -4%. The authors attribute this primarily to lower spending in the financial sector. It is not explained here in more detail which services and offers are affected. By contrast, significant growth is forecast for services (+43%) and automotive and transportation (+21%) segments. With regard to the regional distribution, the study finds no significant difference between large and smaller cities (PwC 2018: 22). Surprisingly, almost a quarter of all Austrians (23%) state that they have been active as providers in the CE. This is highest in retail and consumer goods (15% of Austrians) as well as services (9%) (PwC 2018: 23).

AK: Sector Report (Chamber of Labour)

A third market analysis was published in 2017 by the Chamber of Labour (AK) and was written by the authors Michael Heiling and Simon Schumich, who also published other reports on this topic. This study focuses on the structural data of the platforms relevant for Austria in order to create a basis for political decision-making and legal regulations. Basically, the study assumes that the Austrian economic sector is developing very dynamically and that it still has a high potential (Heiling and Schumich 2017: 4). The study examines 121 platforms that are cited as relevant “players” in two relevant preliminary studies (Heiling and Schumich 2017: 7). In contrast to the above-presented EU Report on the CE (41 active platforms in 2016), the authors note that 70 (58%) of these platforms are available in Austria (data: 2017). Of these, only 21 platforms have a legal branch in Austria (partnership, association, or corporation). Four platforms (eBay, Airbnb, Helpling, and Use Twice), two of them particularly important, had a company in Austria, but these have since been terminated. However, eBay and Airbnb are still active in Austria. In a further step, the seventeen platforms established in Austria were examined. Only Drivy and Uber have their origin in a non-German-speaking country. The seventeen platforms are distributed over different areas as follows (cf. Heiling and Schumich 2017: 11):

- Mobility and transport (car-sharing, car park rental): 41%.
- Online marketplaces: 12%.
- Service brokering (cleaning staff, journeys, parcel services): 17%.
- Crowd investing and crowdfunding: 18%.
- Other (e.g., accommodation, food, city walks): 12%.

Overall, the study authors come to the following conclusions (cf. Heiling and Schumich 2017: 18f):

- The proportion of platforms with Austrian companies or owners is low.
- The data situation on this economic sector is unsatisfactory.
- In general, there are rather low employment figures in this sector.
- The ownership structure is very diverse and often involves “small” corporations.
- Transparency is necessary for a debate on regulation, and tax justice is demanded.

Eurofound: Employment and Working Conditions of Selected Types of Platform Work

In 2018, the working paper “Digital Age: Employment and working conditions of selected types of platform work. National context analysis: Austria” was published (De Groen et al. 2018). As part of the Eurofound project of the same name, eighteen European countries were examined with regard to working conditions in the CE. The study is based on desk research and thirteen semi-structured interviews with experts from various fields. In addition to the presentation of important platforms, the working paper deals mainly with the legal framework for platform workers. Here, too, the authors conclude that there is a very inadequate data basis for this economic sector. Furthermore, there is no specific legal framework for platform workers whereby conventional legal rules are applied. Nevertheless, an imbalance is seen between employers and employees since the latter are often also self-employed and thus represented by the same interest group. However, there is a power gap between these groups (De Groen et al. 2018: 17f).

Overall, the studies all point in a similar direction. Thus, the potentials in the area of CE are carved out, but also critical questions regarding the impacts on the traditional labour markets and economic sectors are posed. Above all, the potential to expand domestic platforms should be emphasised.

Examples

Although internationally active platforms in many areas of CE are market-determining in Austria (e.g., Airbnb), there are also relevant local initiatives. In the following, six examples from different areas of CE are briefly portrayed. No specific criteria were used for the selection. However, these are known projects in user and expert circles, and their launching can be at least mapped to the geographic area of Austria and thus circumscribed to other global players of the CE.

Carsharing24/7 (Mobility)

The platform has been in operation since 2012 and offers real “private” P2P car-sharing. It was thus the first platform in Austria to offer private car-sharing. Since the commercial providers (e.g., Car2Go, Drive-Now) are often only located in the capital City of Vienna, this created a service for the rest of Austria, especially smaller cities and rural areas. As a pioneer in this market segment, carsharing24/7 has also dealt intensively with questions of car-sharing insurance. Different vehicles are offered for sharing on the platform. The company now offers a wide range of Mobility as Service (MAS) solutions. At the end of May 2019, it was announced that the platform would be discontinued in mid-June 2019. The operators of the platform were contacted by the authors to ask for reasons. So far, there has been no feedback. They merely announced on Facebook that they had given up their platform activities without further justification (<https://carsharing247.com>).

Respekt.net (Crowdfunding)

The initiative respekt.net (German for “respect”) was founded as an association for socio-political commitment. In 2010, the crowdfunding platform was initiated with the same title. Sustainable, socio-politically relevant projects can be presented and supported here. The aim is to strengthen civil society initiatives and smaller groups of

committed citizens. In terms of content, the following areas will be addressed in accordance with the factsheet:

- Respect in society (recognition of the dignity and value of every human being regardless of origin, gender, ethnicity, religion, etc.).
- Strengthening democracy (exercising freedom of thought, conscience, assembly, religion and trade unions, transparency, improved opportunities for participation, etc.).
- Activation of civil society (promoting commitment, strengthening civil courage).
- Improvement of the education system (e.g., unrestricted right/access to education).
- Fair opportunities for immigrants (right to asylum, right to participate in prosperity).
- Sustainability and environmental protection (for a viable and humane planet).
- Safeguarding employment (right to work) and the welfare state (right to social security and social progress).
- Equal rights for men and women (more equal opportunities).

The platform has won several awards, and more than 2.4 million EUR in donations have been collected, and more than 350 projects have been financed (www.respekt.net).

Checkrobin/Myrobin (Transport and Logistics)

Checkrobin is a kind of ride-share for all kinds of things that effectively connect individuals and businesses to enable easy, flexible, and fast transportation. As the idle capacity in the area of transport, Myrobin uses the (spare) space of thousands of cars with an empty trunk on the streets. This enables fast and flexible delivery and ensures the driver an attractive travel allowance and, at best, saves CO2 emissions. Using the testimonial Niki Lauda via a TV commercial, the Carinthian start-up from Klagenfurt has expanded its business to Germany and is operating under the name and website myrobin recently (www.myrobin.com).

Fragnebenan (Neighbourhood Platform)

In 2015, the platform fragnebenan.com (German for “ask next door”) was founded. In the meantime, around 56,000 people are already using the platform for neighbourly help in Austria. As there are certain barriers to contact with neighbours, especially in cities (raising anonymity and the increase of single-households), this digital service makes it easier to find contacts by sharing “idle” resources such as tools and household appliances. It is divided into three areas: (1) Sharing of material goods; (2) Timesharing; and (3) Sharing of knowledge, experiences, and information.

A quarter of the user enquiries revolves around classic neighbourly help. One borrows tools or kitchen utensils, shares a backpack etc. or temporarily goes for a walk with the neighbour’s dog. Another important category is recommendations: For example, who knows a good doctor or craftsman in the neighbourhood? The concept of “fragnebenan” is unique: people register with their home address and receive an activation code by mail letter. This ensures that the users are spatially located. After the activation of the account, registered users in the periphery of 750 meters can be

contacted. Thus, spatial proximity is ensured over the digital platform. The use of the platform is free and can thus be assigned to as a not-for-profit platform (<https://fragnebenan.com> and <http://sharingandcaring.eu/case-study/ask-next-door-platform-living-neighbourhood>).

Reposée (Home-Sharing)

The Austrian platform Reposée (www.reposee.com) was founded in 2017 as an alternative player in the sector of accommodation. Launching the platform was funded by the “Wirtschaftsagentur Wien” (Economic Agency of the City of Vienna) and the FFG (The Austrian Research Promotion Agency). About 51% of all leisure properties (weekend cottages, private alpine huts, holiday apartments) are used very little. Unlike Airbnb, there is the idea of regular visits to weekend cottages or alpine mountain huts focusing on a booking period of at least two months, unleashing the untapped potential of underused leisure properties. Interested consumers find accommodation within a radius of max 300 km from home to regularly travel over the weekend or even during the week. Tenants remain flexible and save themselves the large initial investment in their own property. Property owners (owners) earn money and, at the same time, can continue to use their leisure property. Among other things, such as the local economy (e.g., gastronomy), the seasonal vacancy rate in tourism communes is to be reduced (Sharing Economy Wien: n.d.). The project distinguishes between two modes of sharing: (1) FlexShare Model: “This Month You Next Month Me” or “The first two weeks of the month you. The next two weeks I;” and (2) WeekShare Model: “From Monday to Friday You: Weekend Me.” Especially for freelancers who are flexible during the week or want to work in quiet surroundings, this is an interesting option (Kleine Zeitung, 21.04.2018).

All these platforms described above offer different forms of provisioning CE activities of domestic operators. However, looking at the omnipresence in the media and newspaper, one can assume that none of these platforms is as well-known in Austria as Airbnb.

Context

In the last year, there were intense political discussions and legal changes regarding platforms and their (non-)collaborative economic structures. After a lengthy judicial process, Uber was again fined in Vienna in 2018. This concerns the question of the concession for the transport service. Several lawsuits were filed by a taxi company based in Vienna (Vienna.at 2018). Also, in 2018, the City of Vienna adopted a new building law. This stipulates that the renting of apartments to tourists, especially Airbnb, should in future only be permitted outside residential areas (Putschögl 2018).

The wording states: “Avoidance of commercial use of apartments: It is clarified that short-term commercial use for accommodation purposes (e.g., Airbnb) “usually” does not take place in apartments and is therefore not in line with the dedication “apartment” (Wiener Stadtentwicklungs-, Stadtplanungs- und Baugesetzbuch 2018). Which effects this law will have in practice remains to be seen.

Furthermore, in 2018, the City of Vienna started negotiations with Airbnb on the collection of the municipal tourism fee. This led to the demand that the platform should transmit data about all property owners, which Airbnb refused with reference to data protection (derstandard, 24.03.2019).

Other cities with tourist relevance, such as Innsbruck or Salzburg, initiated similar debates. Since there was a danger that each city could adopt its own regulations, the Austrian federal government announced that it would strive for a uniform regulation in Austria from 2020. This provides that booking platforms such as Airbnb must report all bookings and sales. According to the government, private property owners must register centrally in future (derstandard, 24.03.2019). Because the Austrian Federal Government was disbanded due to a political affair in spring 2019 and was temporarily led by experts in a transitional government until the beginning of 2020, it is currently still questionable if these issues have actually been resolved nor when an implementation process of this issue will take place.

Developments

In general, strong growth potential is attributed to the sector of CE. The greatest potential is seen in services and transport, followed by media/entertainment and accommodation (PwC 2018: 23).

Overall, Austria still depicts an underdeveloped image of the knowledge, awareness, and concept of the CE. Nonetheless, this cannot really be transferred to all regions of Austria, since especially the capital City of Vienna, but also citizens of Graz and Salzburg tend to use platforms quicker than the rural population, which is about 34% of Austria's inhabitants (Naumanen et al. 2018: 77).

In their study by the European Commission, Naumanen et al. (2018: 77) give two main reasons for this. First, the population in rural areas tends to be older and is less likely to accept digital services such as platform-based sharing. Second, in an environment characterised by remoteness and long commuting distances, ownership still seems to trump social practices of sharing (possibly due to lower densification schemes than in urban agglomerations).

The "Fair to Sharing Economy" position paper is the outcome of the previous studies by the Europaforum Wien (Big Transformers) and the WU (University of Economics, Vienna) study together with the City of Vienna. In this position paper, guidelines towards a fair economy with local impact are described. Particular attention will be paid to issues relating to the legal basis of the CE and how this can be well-designed in the future in order to promote (more) local initiatives (City of Vienna 2016: 6, 8f).

Issues

To sum up the above-presented studies and surveys, the EU-based research activities that have been carried out through different studies show an EU-under-average usage of services offered through collaborative platforms in Austria. However, the CE offers a myriad of possibilities for citizens and innovative enterprises at the same time. Throughout the national examples depicted in this report, one can see that the manifold spectrum ranges from the empowerment of low-threshold citizens' initiatives to exclusively capital-oriented players that can be provided through current developments in the rapidly growing sectors of the CE and thus may thwart instrumentalised forms of urbanity (Smigiel and Koch 2018: 30).

Today, traditional companies that rely on customers to buy something rather than share it are more likely to face significant threats from businesses in the CE. Research

shows that customers are considering sharing rather than buying when it leads to cost savings of at least 25%, when it is more convenient, or when it provides easy access to an “idle capacity” in goods or services. Similarly, people who use the service of sharing can be converted into shareholders or profiteers (e.g., via a P2P platform). Of course, such developments lead to tensions between the new service providers and existing market participants. The European Commission is now examining how the development of new and innovative services and the temporary use of assets can be encouraged while simultaneously ensuring adequate consumer and social protection.

Other Major Players

Referring to the European level, finding new forms of consistent legislation towards the CE is necessary. Anyhow, a multitude of the challenges that have emerged through the CE is constructed on a global level that affects not only legislation matters but also other societal affairs that often become materialised on a local level. As a result, further research is needed when stressing issues on social challenges that appear parallel to such vast economic transformation processes. Therefore, the following two research projects, based in Graz (“Raumteilen”) and Vienna (“Sharing Economy Wien”), open up new perspectives on how we should use shared resources and face the rise of the collaborative economy in order to guarantee a sustainable and resilient economy within a just and more inclusive society.

Raumteilen (Project on “Sharing Spaces” 2018–2021, University of Graz)

The interdisciplinary research project “Raumteilen” (German for “Sharing and Dividing Spaces”) (funded by the Styrian State Government) investigates the question of how spaces are (commonly) shared in everyday life in times of demographic and economic transformation processes, such as immigration, re-urbanisation, increasing mobility and the effects of digitisation (e.g., through platforms in the CE). Qualitative case studies search for practices that create new spatial configurations through “practical” sharing on the one hand and simultaneous practices of spatial “dividing” on the other. Their interdependencies are therefore translated into three types of space: public spaces, housing (private space) and work (spaces of production). The “micro-geographies” of these spaces assure new insights into our (shared and/or divided) urban economies in highly individualised societies. Framing a PhD dissertation at the Department of Geography and Regional Science, the research project aims to help identify diverse types of practices that contribute to the (co-)production of current urban spaces. It is carried out by the reports’ author affiliated with the University of Graz.

Sharing Economy Vienna (University of Economics Vienna and City of Vienna)

Global platform models are often in the focus of current sharing debates, but local and decentralised models are poorly understood. Decentralised initiatives promise to contribute to the achievement of economic, ecological, and social goals. In order to get an overview of the CE platforms, organizations, and initiatives active in Vienna, the Research Institute for Urban Management and Governance of the Vienna University of Economics (WU Wien) and the City of Vienna launched a joint research project on the active CE initiatives in Vienna. After an initial survey and subsequent survey of the initiatives, the impact of individual business models will be analysed in cooperation with the research association i-share. Finally, recommendations for the creation of

regulatory framework conditions are developed (Sharing Economy Wien, n.d.). The platform offers the opportunity to independently register initiatives from community gardens to crowdfunding using an interactive city map. Likewise, it should draw attention to interesting sharing projects in the immediate surrounding neighbourhood(s) (Stadt Wien, MA 23, n.d.).

Future Directions of Research

In comparison to other European countries, Austria's collaborative economy is mainly characterised by activities in the accommodation sector and platforms connected to financial services. A few of the position papers/studies on the collaborative economy presented in the country report discuss impacts on traditional economic structures and call for a transition from a "sharing economy" to a "fair economy." while new national implications on legislation for global players such as Airbnb are being discussed too. These considerations are related to current trends of precarisation of services offered on platforms since collaborative economies have interfered with basic areas of everyday life such as mobility (Uber), finance (crowdfunding), living and working space (Airbnb and Co-working). Our focus is on global players in tourism as well as non-for-profit sharing on a local scale.

Expert interviews will provide a specific outlook on how the Austrian collaborative economy can be managed and shaped in the future. In addition to important new guidelines for global players, this can, in turn, serve as an example for other countries while opening up a field for local initiatives of diverse economies (Urban Commons) in order to perform more resiliently between capital orientation and the common good towards a less volatile economy.

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