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The Fragile Landscape of the Sharing Economy in Hungary

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Abstract

In this chapter, we assess the current state-of-the-art of the Hungarian sharing economy sector relying on statistics, previous surveys, and expert interviews around case examples. Although we record a fast emergence of an increasing number and a widening variety of multinational and home-grown initiatives, we also contend that in Hungary, the innovation ecosystem of the collaborative economy is still relatively feeble. The linkages that are created through these initiatives are controversial sociologically. The main end-users are highly educated young urbanites. In contrast, on the service provider front, the non-formal workforce is quite vulnerable as the current regulations hardly provide any protection to platform workers. The motivations of the key players in the sector are varied, as only a few locally based initiatives are transformative. In contrast, most examples are solely linked to finding new business opportunities in a shrinking economy.

Keywords: Sharing Economy, Collaborative Economy, Platform Economy, Social Innovation, Ride-Sharing, Short-Term Rental, Hungary, Global and Local Case Examples

Introduction

The leading global stakeholders in Hungary are Airbnb, Taxify (Bolt) and Wolt, and some home-grown businesses (businesses with decade-long history, such as Vatera or Jófogás, and start-ups, such as Miutcánk (Our Street, a neighbourhood sharing platform), Kaptár (Hive) or Door Office (co-working spaces) and Járókelő (Pedestrian, an online volunteer platform to report malfunctioning public services). These local actors are also part of the social innovation community in Hungary, including several grassroots. Even though sharing economy platforms are mushrooming in Hungary, there is only one special interest group, the Hungarian Sharing Economy Association (<https://en.sharingeconomy.hu>) that is operating since 2017, currently with thirteen members.

The development of the ecosystem around the collaborative economy is still relatively feeble in involving the public sector. There are specific examples that explicitly aim at top-down strategies and policies to meet bottom-up initiatives. The main customers or end-users of the sharing economy are highly educated urbanites, according to a non-representative survey by the Hungarian Sharing Economy Association (2017) in Hungary. Their primary motivations are lower prices and easier access to goods and services that motivate the use of these platforms, whereas the survey identified online payment as a common hindrance. All other segments of the society are relatively under-informed about the sharing economy services; four out of five (81%) did not even hear about it. Whereas sustainability is often considered as a central motive in the collaborative economy, this is not explicit in the narratives dominated by how to rethink business in a shrinking economy.

A representative nationwide survey (based on the answers of circa 3500 Hungarian adults) carried out by Buda et al. (2020) aimed to assess the Hungarian population's attitudes towards various sharing economy services. According to the authors, around one-third (38.4%) of the Hungarian population is open to sharing economy services. In terms of social groups, the wealthier, metropolitan, family-oriented, more educated, and younger generations are more likely to be involved in sharing activities. The research also found a relationship between consumer attitudes and openness towards the sharing economy. Not surprisingly, risk-takers, those who have an active social life, those who are environmentally and health-conscious, and have a positive attitude toward digitalisation tend to use the sharing economy services more often than average.

According to the representative cross-country survey, Eurobarometer, conducted by the European Commission in 2016, 16% of the total Hungarian population participated in certain forms of the sharing economy. This is a bit higher than the participation rate of the Visegrád countries (Poland 15%, Slovakia 14%, and the Czech Republic 7%), but lower than in other neighbouring countries, such as Romania (20%) or Croatia (24%).

Another study on the landscape of the Hungarian sharing economy, the PwC report (Osztrovics et al. 2015), contends that the economic viability of sharing economy companies is quite fragile in the medium and long-term, after the intensive, typically

venture capital-fuelled, market acquisition phase of their life cycle. The main expectations about the sharing economy are all closely related to the dominant strategies of mainstream market economics, for example, by reaching and acquiring new customers, boosting the loyalty of existing customers and establishing new revenue channels.

Definition

Regarding definitions, not only a proper and widely accepted definition is lacking in the Hungarian public and professional discourse, but even a consensual Hungarian term that best describes the sharing or collaborative economy. Most often, the term “sharing economy” is used without translation, or in brackets, explaining the Hungarian term of “közösségi gazdaság” (i.e., “community economy”), as this is the preferred term by the Sharing Economy Association in Hungary (www.sharingeconomy.hu). Even the Hungarian Sharing Economy Association—does not invent or use a term in Hungarian and labelled itself partly in English and partly in Hungarian, as the “Sharing Economy Szövetség (Association).” Similarly, the term “megosztáson alapuló gazdaság” (“economy based on sharing”) is widespread and refers to platform economy initiatives. Recent articles titled “Dilemmas of defining the sharing economy” and “The past five years of the sharing economy,” both published in Hungarian, also struggle with finding a proper definition as well as with finding an appropriate Hungarian term (Dudás and Boros 2019; Szűts and Jinil 2020).

Key Questions

As in many other European countries, the regulation of the sharing economy seems to be a re-emerging issue in Hungary as well. Social dialogue in general, even in the traditional economic sectors, is weak, and thus it is also missing from the various sub-sectors of the Hungarian sharing economy. The only umbrella organization in Hungary, named as Sharing Economy Association, is providing a common platform to the diverse range of Hungarian sharing economy actors in order to enhance social dialogue and shaping regulation. As of the end of 2019, they have only thirteen members so far, meaning that they do not fully cover the interests of organizations and platforms already operating in Hungary.

The lack of labour market protection of platform workers and sharing economy service provider individuals is among the most important consequences of the insufficient regulations. As a recent national report on Hungary states, “although trade unions are aware of some emerging issues, they have many different priorities and limited capacities to organize individual workers.” Furthermore, it is also considered to be an issue related to regulatory issues that “platforms typically present themselves not as employers but as innovative, alternative enterprises, and they are mostly invisible in public” (Meszmann 2018: 6). Airbnb’s example presented below describes the above concern the best.

Tourism and accommodation services have been among the most substantial economic sectors in Hungary; the number of accommodation services (or short-term rentals) in Budapest has had steady growth since 2011. A significant role in this recent development has been the arrival of Airbnb, concentrating into the inner city of

Budapest. As of 2018, Airbnb listed more than 8,000 rental outlets (apartments or rooms) in Budapest, mostly in the inner city of Budapest.

Airbnb entered the landscape as an international company in Hungary, and it does not have a locally registered company in the country. It all seems that the market entry was smooth, as, in contrast to the local transport sector, there was no regulation addressing Airbnb to be registered in Hungary. “According to the current Hungarian regulation, it is only the real estate owners and renters who are responsible for complying with taxation rules and other regulations. At the same time, only local renters, other accommodation service providers establish contractual relationships with Airbnb headquarters. From its end, Airbnb generally requires users to fulfil local decrees and legislative requirements without specifying what these are. The general terms and conditions for entering into contractual relationships with Airbnb were provided only in English” (Meszmann 2018: 11).

Examples

There is an increasing variety of home-grown examples from various areas (public services, transportation, food, neighbourhood sharing, tool-sharing, and a co-working space). The examples below are partly based on the short stories collected in the framework of COST Action. Moreover, under the framework of the research project, titled “Trust and Discrimination in the Sharing Economy” (see below, under “Research projects”), our research group carried out several expert interviews with the key stakeholder of the Hungarian sharing economy platform: namely with the co-founder of Oszkár.com, Hungarian owned ride-sharing platform, the co-founder of Miutcánk.hu (neighbourhood sharing) and Kaptár, a co-working space and the founder of Nekedterem (local food delivery initiative).

Járókelő (“Passer-by,” <https://jarokelo.hu>)

It is an online volunteer platform for reports of malfunctioning public services in the city. Launched in 2012, Járókelő, a “fix my street” (or “letter to the mayor”) type of application through which citizens can report malfunctioning public services in the city. It is a civic technology that holds power accountable and relies on twenty volunteers who transfer reports to the authority. Circa 50–100 reports per day grow up to an overwhelming level of engagement that averages 20,000 visitors per month. Reporting back from the administration can take 30 days, and luckily, instead of handling this as a complaining tool, municipalities started to consider it as an urban planning tool.

Oszkár (Oscar, www.oszkar.com)

Was established in 2007 by two university students whose primary goal was to create a sustainable and environment-friendly transportation solution for medium and long-distance travellers in Hungary. As of 2019, they have five full-time employees and 700 thousand—mostly Hungarian—users; recently, Oszkar.com has become the primary ride-sharing platform in Hungary. In the past ten years, they administered all together 3.2 million rides.

The idea of Oszkár is similar to the international BlaBlaCar, with certain specificities. The aim of the application is sharing rides, i.e., to make the search for travel mate easier, to increase the comfort of travelling, to reduce costs and last but not the least, to protect the environment. As a driver, one can post an offer in a few seconds, while as a passenger, one can search among the drivers’ offers. As a passenger, one can

also post offers; in this case, one will receive suitable offers by email. There is a two-way review system (which should be filled in after the ride) aiming at regulating how drivers and riders behave and make them more prone to be polite and to respect the regulations of the company. Drivers receive free stickers saying that the car is part of the Oszkar network. Specific drivers use Oszkár as a business, i.e., they use minivans to take passengers to popular destinations. Oszkár is considered to be one of the largest and most visible Hungarian sharing economy platforms. They are also a member of the Hungarian Sharing Economy Association.

Nekedterem (“Grownforyou”) and Youtyúk (“Yourhen”)

Nekedterem was established in 2012, aiming at providing a personal, trustworthy service for customers who need healthy food from local Hungarian farmers. The basic idea was to establish a shortened “box-based” food chain, a “farm-to-table” home-delivery system in Budapest and its surroundings. The primary source of fruits and vegetables is a well-known cooperative, called Élő Tisza (www.elotisza.hu), which is a flexible, loose network of producing, selling and quality control. Through this network, Nekedterem buys fruits and vegetables. They have their network of suppliers, as well. Lately, they also included more hand-made and home-made products, such as dairies and meat. With broadening the range of available products, they managed to reach higher turnover, as customers buy “larger boxes.” Beyond the wide range of products, seasonal recipes and the introduction of the new farmers are also available on the website.

They work basically as a web shop, where after registration, the customers may pay with a credit card, bank transfer, or it is also possible to pay after the delivery. As of May 2019, they deliver boxes to approx. 300 addresses. Their yearly income was approx. 86 million HUF (280 thousand EUR), and it is estimated to be approx. 100 million HUF (322 thousand EUR) in 2019. Two full-time and one part-time staff work in their Budapest office, and six people work as deliverers and five people as packers. They deliver to Budapest and its surroundings twice a week. For more information on the platform, only available in Hungarian, see <https://nekedterem.hu>. Nekedterem is working together in close cooperation with Youtyúk (www.youtyuk.hu), which is a small platform-based “farm-to-table” shortened food chain system as well, focusing solely on the distribution of fresh farm eggs. As opposed to Nekedterem, Youtyúk does not deliver their products to homes, but customers may pick-up the ordered eggs in boxes through a flexible network of various local stores acting as pick-up points.

Summing up, the speciality of Nekedterem is the promotion of fresh, local, and hand-made products; their target group is the health-conscious customers living in the capital. Besides, the platform also wants to help local production. As their products can be traced back, their customer service receives and answers questions, and they work with a money-back guarantee. The shortened food chain allows a more personal connection between producer and customer; this is their philosophy. Moreover, their customers may also meet producers, as they organize open days.

Miutcánk (“Ourstreet,” <https://miutcank.hu/hu>)

Miutcánk is a Hungarian platform that tries to bring neighbours more closely to each other. The platform was established in 2014 by two Hungarian young men; the basic framework is similar to other international neighbourhood platforms, such as the international street bank (www.streetbank.com) or the Australian nextdoor (<https://nextdoor.com>). A platform is a safe place, built on privacy and trust, where

people use their real names and upload their photos as well. The neighbourhood is defined as a “living within 10 minutes’ walk.” According to the founders, their primary motivation was the following: “We created a social website where people can connect with those who live next door. With the help of Miutcánk, new friendships, trustworthy neighbourhoods can rise, where the locals can ask for help and do favours, can find local solutions to their problems and can decrease wasting through sharing.” In 2015, the founders won a Prize for Social Innovation, called Sozial Marie Prize; that was the point when they started to believe in their project. As of June 2019, Miutcánk has approx. 47 thousand users, two-thirds of them live in Budapest, and 90% of the activities on the platform are also based in Budapest. The aim is to reach 100 thousand users and to expand their geographical scope to Poland, where no such service in operation. They are members of the Budapest-based Sharing Economy Association, as they think joint lobbying activity is crucial within the unregulated Hungarian framework.

Kaptár (“Hive,” <https://kaptarbudapest.hu/en/>)

Kaptár is the co-working space of freelancers in the heart of Budapest. Kaptár was founded in 2012 by a group of young professionals active in organizational development and business coaching. They worked as freelancers and worked from home offices and cafes but got tired of this and decided to create their own co-working office. Soon, they also got interested in how they could create a space that other freelancers could join, and the co-working office could function as a site for community development. Their motivation was to provide services for freelancers or, as they also call, “digital nomads” and to facilitate community building.

In terms of capacities and numbers, as of June 2019, they operate two co-working spaces in the centre of Budapest, providing working space for around 30–35 people in each office; meeting rooms are also available for their co-workers. Four full-time employees work in Kaptár, and one of the co-founders also takes intensively part in the daily operation.

The co-founders think of themselves as a for-profit enterprise with a strong community orientation. They see that many co-working offices provide only space for people to work there parallel to each other. What Kaptár intends to be different from most co-working offices is the community spirit. Community events are taking place every week in Kaptár. These include lunches and dinners, intercultural nights, sports programmes or just hanging outs. Kaptár sometimes organizes professional workshops on diverse topics upon the demands and requests of the co-workers, and they are also a member of the Hungarian Sharing Economy Association

Door Office (<https://dooroffice.hu/en/>)

The first co-worker community is in the making in Szeged, a large regional city in South-East Hungary, where the first co-working office opened in September 2018. The founders were driven by two equally important aims: providing an alternative for “classical” co-workers and emerging enterprises who have no office while facilitating the co-worker community towards self-sustainability.

One unique feature in this co-worker space is that the office itself is hosted by the Franciscan Order of the Catholic Church (in a 500-year-old church building that is the second-oldest building complex of its kind in Hungary). However, the office does not belong to the church, as it is a laic and independent for-profit business. The cooperation between an emerging sharing economy initiative and the church stems

from the lack of proper spaces to rent for a shared office in Szeged. Since one of the co-founders is an active member of the Franciscan community in Szeged, while the church is struggling with populating some of its empty properties, it seemed to be a perfect match. Moreover, community building is in focus both of the shared office and the church, adding one more prominent link to this cooperation. However, the shared office is open for all, regardless of religious or other beliefs. All the co-workers must respect the church rules as the office space is partly connected to it (the gallery of the church can be approached only through the shared office). The activities and daily life of the shared office and the church is also separated but has the potential in this model to utilise the power of the community and the assets that both parties can offer. Also, the founders of the co-working office are open to developing this pilot to a more extensive network of co-working spaces hosted by currently empty church properties to replicate this win-win model in more settings.

Click for Work (clickforwork.hu)

Click for work went live in 2017 in Hungary; the platform acts as a matchmaker between those who lack time to fulfil small and simple tasks and can pay for it with those who have time for such work but need money. The platform connects individuals or companies that need urgent help with minor tasks, not requiring specialised training or skills. The main target group is that of middle school or university students (aged 16+) with capacities and readiness to earn money in their spare time. Typical tasks advertised range widely from gardening, through walking with the dog or small repairs in a household, to office work. Up until now, more than 500 tasks have been advertised, and three applicants per ad on average have been recorded.

Click for work is not a recruiter but acts as an intermediary by providing a platform to advertise tasks, search among ads, and also a private chat module for the advertiser and the applicant to negotiate the details of the mini job. The platform also requires ratings from both parties after the work has been completed.

The geographical scope of the platform is currently Budapest (Hungary), but the platform plans to expand both in Hungary (to other university cities) and in neighbouring countries.

Vedd bérbe: Lease It (veddberbe.hu)

The platform links a forum connecting lessor and lessees to organize transactions based on sharing more or less valuable tools, vehicles, other movable properties or almost any kind of services for rent or use (i.e., not for free). The platform offers its services to both businesses and individuals, and any of them can be a lessor or lessee; thus, all kinds of transactions can happen: B2B, B2C, C2B, and C2C. The platform categorises itself as a hybrid enterprise, not a full sharing economy initiative, as businesses can also use it. However, the underlying principles, such as sharing, as well as economic and environmental sustainability, links the initiative closely with the sharing economy. The platform itself does not own any leasable devices, tools, or vehicles, and it only offers a platform as a moderator or aggregator. It also provides combinations of services, i.e., matching leasable service elements that make up, for example, what is needed for a significant event or the renovation of an apartment. The platform started its operation in 2016 and is still in a growing phase, with the plan to rely on over 200 business lessors and 5000 products in 2019.

Beyond these examples, Facebook Marketplace, and its Hungarian versions, most importantly Jófogás (www.jofogas.hu) and Vatera (www.vatera.hu), both of them are peer-to-peer online retail platforms are also important actors in the field.

Context

The most significant change can be assessed in the local cab or ride-sharing transport, in recent years, in Hungary. There have been several transportations means and sectors in which the sharing economy developed recently. These are ranging from the municipal bike-sharing system (Budapest—MOL Bubi) through the rapid expansion of the private Lime electric scooters to various car-sharing platforms, such as MOL Limo that are used for short-distance rides within city or ride-sharing platforms Oszkar and BlaBlaCar that are used for long-distance rides across cities. As far as local transport is concerned, according to Szűts and Jinil (2020), Hungarians prefer ride-sharing to car-sharing, i.e., Hungarian car owners do not tend to lend their cars. They instead offer rides for others. This section will provide more details on the most critical development that happened in the local cab transport market, mainly in Budapest.

Local Cab Transport: The Case of Uber and Taxify (Bolt)

Following its November 2014 launch, Uber had already 160,000 customers and 1,200 drivers by mid-2016, before it was banned in Hungary for the benefit of licensed taxi service. In ride-sharing, the main actors and platforms are Oszkar.com specified in long-distance ride-sharing, BlaBlaCar.com and, most recently, Taxify.eu, recently renamed as Bolt (<https://bolt.eu/hu/>) at city level rides. According to Meszmann (2018), the publicly available information on company annual reports of 2016 and 2017 indicates a significant growth: whereas in 2016 the company employed four office staff, it increased to ten in 2017. The total revenue has increased by fivefold within a year: in 2016, it was 32.66 million HUF (approx. 100 thousand EUR) which increased to 166,8 million HUF approx. 500 thousand EUR) in 2017. As Meszmann argues, “in contrast to other transport organizing companies, instead of collecting membership fees Taxify (Bolt) automatically took in an average of 20% of the paid service. Media reports suggested that the platform company was actively recruiting Uber drivers. By April 2017, there were 200 cars in Budapest under the Taxify banner” (Meszmann 2018: 13).

Developments

Besides ride-sharing and shared transportation, another field that showed remarkable development is the food delivery market. The home-grown application (which is now owned by foreign investors) NetPincér (NetWaiter, see at www.netpincer.hu) has dominated since its foundation in the past decade. Competitors tried to enter this market but often failed and left, such as the international brand Deliveroo. However, in 2019, Wolt seems to gain a significant role in the bike and scooter delivery market along, where only NetPincérGo, the biker delivery subsection of NetPincér, has been dominant in this market. At the beginning of this new trend, it is too early to project the outcome of this competition, but experts suggest that Wolt can be a real rival to NetPincérGo for longer than the previous candidates.

Issues

In transportation, similarly to other European cities, the tension between Uber and traditional cab or taxi companies ended with the triumph of the taxi companies. In summer 2016, taxi companies blockaded one of the main squares of Budapest, and several Uber drivers were and insulted physically. As a result of this enormous social and political conflict, Uber was forced by a dedicated regulation (accepted by the Hungarian Parliament on June 13, 2016) to leave the Hungarian market in summer 2016 due to the lobbying of transportation and taxi associations that represented the interest of its members.

After Uber was crowded out from Hungary, a hybrid type of car-sharing was introduced, lowering administrative burdens, and focusing on the environmental aspects by using (partly) electric vehicles. As a result, GreenGo was launched in 2016, and MOL Limo was launched in 2018; both of them are company-owned and based on their operation on online platforms.

Other Major Players

Only one significant lobbying group operates in Hungary to promote the development of the sharing economy in Hungary. The Hungarian Sharing Economy Association (www.shareconomy.hu) was established in March 2017. The central vision of the Association is as follows: with the joint representation of their members, as well as exploiting the potential of sharing, it helps all the players in the economy to operate efficiently and sustainably. They are looking forward to the application of any company that works in the spirit of sharing economy and wants to participate in its promotion.

Their activities can be summarised in the following three areas (source: www.shareconomy.hu/?lang=en):

- Support: “We help to create a general framework for the functioning of the community economy representing the interest of businesses and consumers in every possible forum.”
- Finding answers: “We support to deepen of the knowledge about the community economy and promote the aspirations of enterprises operating in the spirit of sharing economy.”
- Shaping regulation: “Our members agree to promote the development of legal guidelines and tax regulations that are tailored to the functioning of community economic models and are ideal for all stakeholders.”

The Hungarian sharing economy sector is often shaped by actors who represent and lobby for the mainstream, traditional stakeholders and companies of those sectors that are influenced by new sharing economy businesses the most. In tourism, the emergence of Airbnb, the extension of Booking.com towards apartments and other short-term rental platforms that entered that market dominated for long by hotels, B&Bs, pensions triggered a response from the traditional businesses. They immediately stood up for their interest and started lobbying through various tourism and hospitality associations to limit the activity and the development of Airbnbs and other STMs in Hungary, especially in Budapest.

Future Directions of Research

Among others, there is a three-year-long research project titled “Trust and Discrimination in the Sharing Economy: With a Special Focus on Collaborative Consumption Platforms.” Principal investigator: Borbála Simonovits, PhD. Financed by: Young Researcher’s Grant by the National Research, Development, and Innovation Fund (FK 127978). Implementation period: From December 1st, 2018, to November 30, 2021. Further information: <https://ippi.ppk.elte.hu/en/research>

There are also several research groups with the involvement of Hungary and Hungarian researchers that are preparing co-authored book chapters and journal papers within the Sharing and Caring COST Action. These cover a wide range of topics, such as the scaling of collaborative initiatives, the role of social media in collaborative actions, the investigation of bike-sharing systems operating in various European cities or the emergence of solidarity or care economy in times of crises.

Summary

The Hungarian sharing or collaborative economy has been flourishing in the past years, as demonstrated by an increasing number and widening variety of both multinational and home-grown initiatives and platforms. Regulatory instabilities, for example, when Uber was forced to leave Hungary, makes this emerging trend somewhat fragile. The main sharing economy actor is Airbnb. Also, there is a wide range of remarkable and sustainable small to mid-sized home-grown platforms and initiatives in transportation, food delivery, local food production and connecting ethical purchasing groups or in the office industry. Regulations have been unable to follow the developments and reacting correctly to its emerging issues. Therefore, the sector cannot protect platform workers’ rights, and this makes the employees and non-formal workforce more vulnerable.

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