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A Note on the Emerging Landscape of the Sharing Economy in Switzerland

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Abstract

To outline the emerging landscape of sharing economy services in Switzerland, this report synthesizes prior market research and technology assessment studies on collaborative consumption and its role in the Swiss workforce. It offers a bird's-eye view of key stakeholders in contemporary Swiss sharing economy services, as well as the models and tools adopted by these services. It also provides several examples of local sharing economy initiatives and identifies emergent issues in this space. The report concludes with suggestions for further reading and research inquiries.

Keywords: Sharing Economy, Switzerland, Pumpipumpe, Mobility, Leihbar, Sharely

Introduction

A 2015 study from Deloitte (Zobrist and Grampp 2015) illustrates the growth of the collaborative economy in Switzerland. The study divides the Swiss sharing economy into five areas: transport, accommodation, goods, services, and financial services. Today, well-known sharing economy companies such as Airbnb and Uber are competing for customers with their traditional counterparts in the accommodation and taxi industries. For example, a study by the Valais Tourism Observatory in summer 2017 puts Airbnb's market share at 30 per cent of the total hotel beds supply across

Switzerland (Walliser Tourismus Observatorium 2017). This number has most likely increased since then.

Drawing on two prior in-depth inquiries of the state of the collaborative economy in Switzerland (von Stokar et al. 2018; Zobrist and Grampp 2015), this report puts forward the question: “What are the key characteristics of the Swiss sharing economy landscape?” The report is organized as follows. To begin, the authors present the adopted definition of the sharing economy in Switzerland; then, they offer three main questions that can be used to chart the current landscape of the sharing economy in the country. Next, the report provides several examples of sharing economy initiatives, briefly outlines the national context, the current developments, and the emergent issues within this space. The report concludes with the suggested readings and enumerates a few potential directions for future research.

Definition

There is no agreed definition of the sharing economy in Switzerland. For example, the recent comprehensive inquiry of the national sharing economy landscape (von Stokar et al. 2018) considers the sharing economy as a special case of the platform economy. However, the Swiss Federal Council, in their “Report on the central framework for the digital economy” (The Swiss State Secretariat for Economic Affairs 2017), has largely agreed upon the European Commission definition of the collaborative economy as “a complex ecosystem of on-demand services and temporary use of assets based on exchanges via online platforms” (European Commission 2015). The report has also acknowledged that the transactions in the sharing economy do not imply transfer of ownership of a resource and involve time-limited use of resources. What is more, the report suggests accounting for peer-to-peer as well as hybrid models (i.e., business-to-consumer) of the sharing economy as usually, both offerings are widely present side by side within a single online marketplace or a platform.

Key Questions

This report briefly outlines existing types and models of the collaborative economy in Switzerland, identifies key stakeholders, and illustrates technological tools used to support the collaborative economy in Switzerland.

1. What Types and Models of Collaborative Economy Are Present in Switzerland?

Airbnb and Uber are successful in large parts of Switzerland (Zobrist and Grampp 2015). In addition, an increasing number of start-ups have formed in the area (Ingber and Jürgensen 2014). The most popular ones have already expanded their business abroad. For example, Housetrip from Lausanne, a Swiss equivalent of Airbnb, has become one of the largest platforms for renting places across Europe. It was recently acquired by TripAdvisor. Sharoo, a car-sharing start-up from Zurich, is considered a pioneer in the field of software development for vehicle-sharing platforms (Zobrist and Grampp 2015). Mila.com, a platform for matching tech-savvy individuals (both professionals and private persons) with consumers in need of tech assistance, has expanded to 150 European cities.

It seems that most of the Swiss sharing platforms adopt a classic model of revenue generation: retaining a transaction fee (in per cent of the transaction value or using a fixed fee) each time they match a producer and a consumer. However, there are local grassroots initiatives that seem to be operating based on altruistic and communal values. For example, Pumpipumpe (www.pumpipumpe.ch) is an online service that provides a set of stickers for one's mailbox to let neighbours see what things one can borrow. It offers a search and map interface to find available household items from close-by neighbours, as well as a messaging service to coordinate exchanges. However, it does not specify how the sharing transaction should take place. There is no monetary compensation explicitly designed and endorsed by the platform.

2. Who Are the Key Stakeholders in the Collaborative Economy in Switzerland?

The main stakeholders in the Swiss collaborative economy are predominantly businesses (including start-ups) that establish online platforms for delivering goods and services to individuals. However, there are occasional federal (e.g., as in the promotion of Mobility car-sharing through the federal rail services) and local governmental collaboration (e.g., as in Publibike.ch, a bike-sharing initiative operated by the Swiss Post, which collaborates with municipalities in setting up bikes in several Swiss cities) with the ecosystem of the collaborative economy. Several grassroots initiatives and non-profit enterprises are also present. However, their role in the overall ecosystem seems still small. In addition to the above-mentioned Pumpipumpe, an advocacy group called Sharecon (<http://sharecon.ch>) has promoted sharing economy initiatives in Switzerland (since 2013) and supports founders by providing networking opportunities with industry, policymakers, and society at large.

Large Swiss companies such as Migros (supermarkets), Mobiliar (insurance), Nestlé (food), SBB (rail) and Swisscom (telecommunication) have also realised the potential of the sharing economy (Zobrist and Grampp 2015). The political framework for start-ups in Switzerland is relatively good, given established infrastructure, a well-functioning labour market, high education standards and low regulatory hurdles. Nevertheless, experts identified several challenges when it comes to sustaining sharing economy start-ups: little financial support beyond developing the initial idea (e.g., particularly when a product reaches the market), the relatively small size of the Swiss market, and high labour and production costs (Zobrist and Grampp 2015).

Overall, a large majority of Swiss consumers (63%) agrees that the collaborative economy, in general, offers a more sustainable way to use underutilized resources (Zobrist and Grampp 2015). Nevertheless, the authors are not aware of the policies/mechanisms in place to secure its sustainable future. While there is growing governmental interest in supporting car-sharing initiatives (e.g., Mobility), stronger incentives (e.g., tax breaks for the shared car use) and more active participation overall would be beneficial to support and promote collaborative economy initiatives. In addition to that, only a few non-profits operate in the Swiss sharing economy—most businesses in this area are for-profit. What is more, despite the historical importance of local communes in Swiss society, few community-based non-profit initiatives are active in the sharing economy sector.

3. What Are the Technological Tools Used to Support Collaborative Economy Initiatives?

Smartphones and online platforms are ubiquitously used by consumers and producers of sharing economy services. An April 2017 study ranks Switzerland #3 in worldwide smartphone penetration (Newzoo 2017). Consequently, fielding online-based/mobile sharing services have a low barrier of entry in Switzerland.

For example, Sharoo developed its own car-sharing software that allows finding and unlocking vehicles using consumer smartphones (Burkhard 2014). Similarly, the car-sharing initiative from Luzern, Mobility.ch, uses RFID-based readers to provide access to their car fleet. Due to the partnership with Swiss Federal Railways (Schweizerische Bundesbahnen, SBB), customers can use the popular SwissPass card (which typically stores electronic versions of rail passes but also supports other types of tickets, such as ski passes) to also hold their Mobility “key” to access any of over 3000 Mobility vehicles across the country.

A dozen of food cooperatives (e.g., ortoloco.ch) and solidarity community-gardening associations use a specialised open-source platform Juntagrigo (<https://juntagrigo.org>), to coordinate their day-to-day activities (e.g., task allocation, billing, shareholder management) and handling interactions with community members (e.g., administer subscriptions for delivery fruits and vegetables).

Examples

The local resource sharing community Pumpipumpe, founded in Bern in 2012, provides a set of stickers that can be put on a mailbox to let neighbours know what household items one is willing to share. Being a low-tech solution, the service neither specifies how the sharing of those items would be arranged nor endorse any monetary compensation—it is up to the individuals to agree on terms of use and arrangements for a return. The pre-defined images on the stickers vary from common household items (e.g., a bike-pump) and tools (e.g., a drill), to rarely used kitchen appliances (e.g., a pasta maker), to typical Swiss cookware such as fondue sets. One can design their own sticker as well, in case none from the standard set match.

Pumpipumpe

It is a non-profit association that seeks to support face-to-face encounters of neighbours. The association is run entirely by volunteers. All revenues collected from the sale of the sticker sets (7 Swiss Francs/Euros for a set of 50) cover the printing and shipping costs. This rather simple idea quickly gained popularity outside Switzerland. Now, over 24,000 households participate worldwide. Pumpipumpe is an interesting example of a sharing economy service that promotes trust, encourages sustainable consumption, facilitates social encounters, and fosters the development of local communities.

Note that a for-profit version of Pumpipumpe also exists in Switzerland: Sharely (<http://sharely.ch>), the “local online rent and share platform.” They have a refined web search interface that can accommodate some specific requests, for example, categories of items or locations. A dedicated smartphone app allows one to quickly reach out to an owner to initiate a transaction. In contrast to Pumpipumpe, Sharely

implements a reputation review system using ratings from peers upon completion of the transaction (i.e., a return of an item).

Mobility.ch

A cooperative from Luzern, founded in 1997, is a pioneer in car-sharing in Switzerland. Mobility uses the same model as Zipcar, providing time-based access to over 3000 vehicles in nine different categories. However, in contrast to Zipcar, Mobility is a cooperative, with nearly 40% of its 177,000 customers being members. Rates are based on the number of kilometres driven and the time spent having reserved the vehicle (fuel is included in the mileage, with each car featuring a specific debit card that one can charge refuelling to). Mobility developed its own car-sharing software, called MobiSys. It uses RFID-based readers installed in each car to provide access to its car fleet. Customers can link their existing RFID-enabled multi-purpose SwissPass card to unlock a vehicle (otherwise, a Mobility-specific RFID card is given out).

Contrary to other car-sharing services such as Car2Go, Mobility requires that each vehicle be returned to its specific parking spot at the end of the rental (similar to Zipcar). However, a recently established Mobility subsidiary operating under the brand Catch-a-Car (www.catch-a-car.ch/en/about/) introduced a “free-floating” car scheme, where the vehicle can be dropped at a public parking or curbside parking within a residential zone. Similarly, to Car2Go, vehicles can be located using a smartphone a Catch-a-Car has only offered their service within the cities of Basel and Geneva. In the summer of 2019, the service was rebranded as “Mobility Go” and is now fully integrated into the Mobility ecosystem. Until early 2019 Mobility used to hold a share in a Sharoo AG (<http://sharoo.com>), which provides a platform for sharing private cars. Car owners install a controller box in their car, which enables Sharoo consumers to open and lock the car using the Sharo. Car owners can then set availability times and rates directly in the a

Leihbar (www.leihbar.ch)

It is one of the few tool libraries in Switzerland. It was founded in Bern in 2019 by the Swiss Consumer Protection Foundation. The library operates as a non-profit association; it has been run by twenty volunteers and has served over 200 members since its inception in March 2019. The yearly membership of 60 Swiss francs gives a member unlimited access to over 350 tools. The tools varied from simple hand tools for home and garden maintenance (e.g., pipe clamps, a wheelbarrow) to high-end power tools (e.g., Mitre saws, air compressors) to items for leisure (e.g., a dinghy, a sled). Leihbar uses state-of-the-art software among tool libraries myTurn (<https://myturn.com>) to handle the loans and to maintain the tools' inventory.

Context

When it comes to the overall perception of sharing economy services in Switzerland, the Deloitte study (Zobrist and Grampp 2015) finds that 55% of Swiss consumers are willing to use sharing economy platforms, in contrast to 45% of the US consumers. However, the study also finds significant regional differences within Switzerland: while in the French-speaking part of Switzerland (roughly 23% of the population), 65% of participants are in favour of sharing economy services, only 32% of consumers in the German-speaking parts (which represents about 63% of the population). No data exists for the Italian-speaking or Romansch-speaking parts of the country (8% and

0.5% of the population, respectively). Despite these differences, Swiss consumers seem to be overall in agreement that the collaborative economy will lead to lower prices and a wider choice of options.

The Gottlieb Duttweiler Institute conducted a representative survey (Frick, Hauser, and Gürtler 2013) of people in Switzerland and Germany about their willingness to share and what motivates them to do so. The most shared categories of items were personal recommendations (e.g., travel tips), food, books, music collections, and tools. When it comes to motivations to share, the Swiss mainly pursue social aspirations (e.g., maintain social ties), they are also gladly willing to engage in sharing because it is fun to do things together instead of alone; it is good for the environment and the community at large.

With regard to policy, there seems to be no specific framework in place that regulates sharing economy business models. Some legal experts argue that many of the legal questions and uncertainties can be answered using existing laws and regulations (von Stokar et al. 2018; Zobrist and Grampp 2015). Nevertheless, there are growing concerns (Zobrist and Grampp 2015) of politicians and the general public about safety (for taxi services, e.g., via Uber) and hygiene standards (for room rentals, e.g., via Airbnb).

One of the most debated questions in Switzerland regarding the legal challenges of the sharing economy is whether the workforce behind an online sharing platform (e.g., Uber drivers) should be considered self-employed or rather employed by the platform operator (Auf der Maur and Gassmann 2017). The Swiss Federal Council report (The Swiss State Secretariat for Economic Affairs 2017) questions the lasting value of a “one-size-fits-all” regulatory approach to this issue because new working/business models rise and develop quickly, and instead recommends assessing each individual platform and their employment model on a per-case basis.

Another resolution came with regards to current Swiss rental law. After a three-month consultation process, the Swiss government suggest minor amendments to Swiss tenancy law (Der Bundesrat 2018), where subletters (as in the case of Airbnb) need to obtain a landlord’s general permission to sublet repeatedly over a given period, relaxing prior obligation to ask permission and report every paying guest every time they want to rent.

For further details on the required actions and recommendations, see a comprehensive report (von Stokar et al. 2018) commissioned by the Swiss Foundation for Technology Assessment (TA-SWISS).

Developments

A survey from Deloitte (Grampp and Zobrist 2016) on the workplace of the future in Switzerland suggests that the growth of the digital and sharing economy led to more individuals establishing themselves as micro-entrepreneurs. According to their study, one in four working people in Switzerland currently works as a freelancer. When it comes to the remaining 75%, one-third of them would like to do so in the next year. The contemporary sharing economy services encourages people to offer and provide services via online platforms. Consequently, the rise of such services is considered by the study authors as the main driver of the freelancing trend. What is more, the study concludes that alternative workplace forms, such as co-working spaces or working

from home arrangements, become increasingly important for the Swiss workforce. The knowledge-intensive industries started to recognise this trend and seek to develop adequate solutions to leverage mobile workstyles.

Concerning the development of the sharing economy in Switzerland, the TA-SWISS study (von Stokar et al. 2018) predicts that the high-level of education of the Swiss workforce, well-developed industries (e.g., IT sector), fair digital expertise among the Swiss population as well as pragmatic legislation create favourable conditions in the country to exploit economic and social potentials of the sharing economy. However, the high purchasing power of the Swiss population could stand in the way of the growth of sharing economy services.

Issues

The recent study of the sharing economy landscape in Switzerland (von Stokar et al. 2018), commissioned by TA-SWISS, not only illustrates the particular opportunities and challenges of the sharing economy in the country but also offers a set of strategies in order to maintain its positive dynamic development, as well as provides actionable recommendations how to mitigate its potential negative consequences. In particular, they outline the three biggest challenges for policymakers:

- 1) The ways data and data protection issues are managed by sharing economy platforms. The data that peer-producers and peer-consumers leave on sharing economy platforms (e.g., transaction details, profiles, reputation scores) has a high-value for platform operators. However, the end-users have no clear understanding of how this data will be used, as well as have limited control of its future dissemination. This can create undesirable effects that can lead to mistrust in platform operators.
- 2) The impacts of the platform economy on the labour market and social insurance (e.g., social security funds). In the event of rapid expansion of the platform economy, three main risks have to be addressed within future legal provisions: (i) the monetization of unpaid volunteer work; (ii) health issues for the working population, and (iii) the casualization of employment (e.g., lower job security, insufficient pay, less social security).
- 3) The consequences of the rapid expansion of sharing economy platforms on the competitiveness of the Swiss economy and business innovation. In order to ensure future competitiveness, Swiss business players should invest in developing their expertise in exploring the aspects of digitalisation of their existing business models (e.g., through integrating novel distribution channels offered by the sharing economy). In turn, administrative authorities and legislators are required to monitor the various markets and apply competition law as needed in order to prevent the formation of monopolies.

Related Research Groups and Industry Efforts

Felicitas Morhart and Katharina Hellwig, researchers of the Faculty of Business and Economics of the University of Lausanne, have an extensive publication record in the sharing economy scholarly area. They especially focus on this phenomenon from marketing and consumer behaviour perspectives.

Claudia Binder, head of the Laboratory for Human-Environment Relations in Urban Systems at the School of Architecture, Civil and Environmental Engineering at EPFL, investigates the rebound effects and the related environmental impacts of the sharing economy.

Marlyne Sahakian, a researcher at the Institute of Sociological Research at the University of Geneva, explores the roles of alternative economies in relation to environmental concerns and social equity. She is particularly interested in the context of household energy and food consumption.

Anton Fedosov (University of Zurich) and Marc Langheinrich (USI Lugano) explore the role of interactive technologies to support sharing economy initiatives. Stemming from the systematic literature review of physical and digital sharing practices (Fedosov, Albano, and Langheinrich 2018), they developed a design toolkit and a corresponding methodology for the creation of novel sharing economy services and tools (Fedosov, Kitazaki, Odom, and Langheinrich 2019).

Sharecon.ch is a non-profit organization that promotes sharing economy initiatives in Switzerland and supports local start-up founders by providing networking opportunities with industry, policymakers, and media.

Future Directions of Research

This report highlights several research avenues that one can explore in their distinct scholarly area (e.g., legal studies, economics, sustainable consumer behaviour). For example, by employing quantitative research approaches and conducting representative surveys among peer-consumers and peer-producers, one could investigate the environmental impact of the sharing economy and determine its rebound effects (e.g., how the saved or earned money are actually spent).

In turn, the authors are particularly interested in investigating the sharing economy initiatives in Switzerland, adopting qualitative research and design research approaches to examine the mechanics of how the sharing of underutilized resources plays out in practice. Future research could conduct a comparative study eliciting and contrasting the characteristics of different models in the sharing economy, ranging from mostly physical peers' encounters (e.g., the Pumpipumpe approach) to both physical and digital interactions (e.g., Bern's Leihbar physical space and an online inventory for tool requests), to dominantly digital interactions among peers (e.g., Sharely, a local online marketplace). A better understanding of the practices surrounding the different models, their boundaries, and limitations, as well as employed physical/digital innovations (e.g., Pumpipumpe's sticker system paired with an interactive map) contributes to social exchange literature and adds to Human-Computer Interaction research on local resource sharing communities that facilitate social encounters among members and encourage sustainable consumption practices at large.

Summary

Drawing on prior market research and technology assessment studies, this report provided a (non-exhaustive) collection of the main developments of the state of the sharing economy in Switzerland from 2015 until 2019. The authors described the major players, the typical examples of the Swiss sharing economy initiatives, outlined the

consumer attitudes when it comes to sharing, and demonstrated the emergent issues for policymakers with regard to scaling the sharing economy in the national context.

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Pumpipumpe. A sharing community: <http://pumpipumpe.ch>

Sharely Mietplattform. Lokal mieten und vermieten: www.sharely.ch

Sharely on Twitter: “Brandneue Infografik mit einem Überblick über alle Sharing-Services in der Schweiz!”
https://twitter.com/sharely_ch/status/664004854633791488

Verein Sharecon Schweiz Netzwerk, Sharing Economy, Sharing: <http://sharecon.ch>