Analysis

The sharing economy: A pathway to sustainability or a nightmarish form of neoliberal capitalism?

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A R T I C L E I N F O

A B S T R A C T

The sharing economy seemingly encompasses online peer-to-peer economic activities as diverse as rental (Airbnb), for-profit service provision (Uber), and gifting (Freecycle). The Silicon Valley success stories of Airbnb and Uber have catalysed a vibrant sharing economy discourse, participated in by the media, incumbent industries, entrepreneurs and grassroots activists. Within this discourse the sharing economy is framed in contradictory ways; ranging from a potential pathway to sustainability, to a nightmarish form of neoliberalism. However, these framings share a common vision of the sharing economy (a niche of innovation) decentralising and disrupting established socio-technical and economic structures (regimes). Here I present an analysis of the online sharing economy discourse; identifying that the sharing economy is framed as: (1) an economic opportunity; (2) a more sustainable form of consumption; (3) a pathway to a decentralised, equitable and sustainable economy; (4) creating unregulated marketplaces; (5) reinforcing the neoliberal paradigm; and, (6) an incoherent field of innovation. Although a critique of hyper-consumption was central to emergence of the sharing economy niche (2), it has been successfully reframed by regime actors as purely an economic opportunity (1). If the sharing economy follows this pathway of corporate co-option it appears unlikely to drive a transition to sustainability.

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1. Introduction

There is rapidly growing interest in the nature and impacts of the sharing economy amongst entrepreneurs, innovators, incumbent businesses, policy-makers, media commenters and academic researchers alike. Much of this interest arises from the Silicon Valley success stories of two sharing economy platforms: Airbnb, an online peer-to-peer platform which enables people to rent out residential accommodation, including their own homes, on a short term basis; and, Uber, an online peer-to-peer platform providing taxi and 'ridesharing' services. Both platforms have made the journey from an entrepreneurial start-up company to a multi-billion dollar international corporation in less than five years (Lashinsky, 2015, Konrad and Mac, 2014). However, the wider economic impacts of the sharing economy remain unclear, although PWC (2014) speculatively estimates that current global annual revenues are $15bn, potentially growing to $335bn by 2025. Amidst great commercial success, Airbnb and Uber have also faced considerable resistance and criticism for opening up unregulated peer-to-peer marketplaces with adverse social impacts (e.g. Schofield, 2014). Whilst, the concept of the sharing economy itself has been the subject of scathing critique; for example, Morozov (2013) argues that it is a form of "neo-liberalism on steroids" which commercialise aspects of life previously beyond the reach of the market.

Meanwhile, there is also considerable interest in the sharing economy as a means of promoting sustainable consumption practices. Heinrichs (2013: 228) has heralded the sharing economy as a "potential new pathway to sustainability", whilst Botsman and Rogers (2010) argue that it will disrupt the unsustainable practices of hyper-consumption that drive capitalist economies. The latter's central argument is that the sharing economy enables a shift away from a culture where consumer's own assets (from cars to drills), toward a culture where consumers share access to assets. This shift is driven by internet peer-to-peer platforms which connect consumers and enable them to make more efficient use of underutilised assets. For example, peer-to-peer car sharing platforms (e.g. Easycar Club) enable individuals to directly rent their vehicles to others, hence enabling more efficient use of the underutilised vehicle stock. Furthermore, Botsman and Rogers (2010) argue that such peer-to-peer platforms promote more equitable and sustainable distribution of resources by reducing: the costs of accessing products and services; and, consumer demand for resources. For example, in the case of peer-to-peer car rental, the cost of rental is lower than the cost of car ownership, and rather than several people each owning a car they share access to a single car.

These contrasting and contradictory framings of the sharing economy are merely the tip of an iceberg; a transnational discourse participated in by a diverse cast of innovation actors (Stokes et al., 2014). However, there is common ground within this complex discourse, as many actors frame the sharing economy as a disruptive innovation that could transform market economies. Complex discourses and contradictory framings often surround innovations which seek to transform society and create a sustainable economy (e.g. Berg and Hukkinen, 2011). Hence, to better

understand the sharing economy, and the surrounding discourse, I turn to the field of sustainability transitions (Markard et al., 2012, Smith et al., 2010). Where researchers have theorised how discursive strategies, including framing and narratives, are employed to shape the processes of innovation and social and technological transformation (Geels, 2014, Hermwille, 2015, Smith and Raven, 2012).

Applying a transitions perspective the sharing economy is conceptualised as a niche (Smith and Raven, 2012, Martin et al., 2015); a field of related innovations (i.e. sharing economy platforms) and the intermediaries who support and promote the development of these innovations (i.e. sharing economy advocates and investors). As the sharing economy niche develops, transitions theory posits that it may influence or even transform regimes (Geels, 2005); the prevailing socio-technical systems, such as the transport and tourism systems, which serve societal needs. Hence, in this paper, the sharing economy discourse is considered to be the public expression of the ideas which both give meaning to, and shape, a niche. Within this discourse I focus on the processes of framing (Snow and Benford, 1988, Steinberg, 1998). The deliberative, communicative processes through which niche and regime actors seek to position, mobilise a consensus around, and shape the development of, the sharing economy. Hence, I pose the research question: how is the sharing economy framed by niche and regime actors? To address this question I present an analysis of a sample of the online sharing economy discourse; identifying six framings which seek to empower and resist the development of the niche. Given the nascent state of the sharing economy literature (Martin et al., 2015), this analysis is offered in the hope that it will enable academic researchers to better position their work within the on-going and contradictory discourse. Furthermore, I hope to establish the sharing economy as a niche of empirical interest within the sustainability transitions literature. Whilst, also presenting findings that help practitioners and policy-makers to better understand the many faces of the sharing economy.

The next section of this paper presents the theoretical context to the research, including key concepts from socio-technical transitions theory and framing theory. I then present the background to the research in the form of a brief history of the sharing economy and a description of the structure of the sharing economy niche. Subsequently, the research methods are described including the approach to gathering and analysing data from the online sharing economy discourse. The research results are then presented in the form of six framings of the sharing economy. Based on these framings four potential pathways for the development of the sharing economy niche are identified. Finally, I discuss the implications of the results for sustainability transitions.

2. Materials and Methods

2.1. Theoretical Context

The field of socio-technical and sustainability transitions research (Markard et al., 2012, Smith et al., 2010) has developed over the past two decades seeking to understand how societies and economies are and can be transformed. In particular, researchers have focussed on the processes of transformative change by which societies could become sustainable. The Multi-Level Perspective (MLP) (Geels, 2005) is a prominent and widely applied theoretical model within transitions research (Smith et al., 2010). This model posits that the processes of transformative change can be understood in terms of the interactions between the multi-level socio-technical structures which constitute society. Three levels of structure are delineated by the MLP:

- first, the *landscape* consisting of slow changing structures deeply embedded in the fabric of society including culture, societal values and the prevailing economic paradigm;
- secondly, the *regime* consisting of the prevailing socio-technical systems which serve the needs of society including the consumption, production, digital communications and transport systems;

- and thirdly, the *niche*, the protective space (Smith and Raven, 2012) within which innovations emerge and develop.

Niche innovations emerge across the market economy and civil society; for example, electric vehicles (Bakker and Farla, 2015), the sharing economy (Martin et al., 2015), and community currencies (Seyfang and Longhurst, 2013). Furthermore, these niches are considered to hold the potential to transform the prevailing structures of the regime and landscape. Whilst, the niche itself is conceptualised as a two level structure (Geels and Raven, 2006) consisting of: the *project level* – a field of related innovations each grounded in a specific local context; and, *the global level* – a network of intermediaries and advocates promoting social networking, social learning and mobilising resources across the local level.

Research has recently begun to explore the role of discourse in the processes and structures posited by the MLP (Geels, 2014, Hermwille, 2015, Smith and Raven, 2012). This research has tended to adopt a Foucaultian perspective (Foucault, 1972), conceptualising discourse "as an ensemble of ideas, concepts and categories [expressed in language] through which meaning is given to social and physical phenomena, [and] which is produced and reproduced through an identifiable set of practices" (Hajer and Versteeg, 2005: 175). Hence, within the MLP, discourse gives meaning to, and is embedded within the practices of, the social and technical structures that constitute the niche and the regime; in turn shaping the dynamics of regime reproduction and niche innovation. Furthermore, within the transitions literature two approaches to engaging with discourse have emerged, focusing on the role of narratives and framing processes respectively.

Hermwille (2015: 6) identifies narratives as the primary element of discourse of interest in transitions research, as they both articulate sustainability problems and seek to identify and progress solutions. Hence, narratives can provide "a solid basis to understand the strategies deployed by powerful [regime] actors" (Franceschini and Pansera, 2015: 70) including the policy-industry coalitions which resist niche innovations (Geels, 2014). Narratives can also provide a basis to understand how global level niche actors "attempt to reshape perspectives and patterns of social action and enable institutional reforms" (Smith and Raven, 2012: 1032). Such narratives of niche empowerment (Smith and Raven, 2012) seek to mobilise resources within the niche, spread positive expectations of niche performance and highlight tensions within the regime. However, I suggest that the conceptualisation of narratives employed is rather limited and potentially unhelpful. In particular, the core features of narratives as conceptualised in the extensive narratology literature (Czarniawska, 2010) – including a beginning, a middle and an end – are not generally addressed in the transitions literature.

The second approach to addressing the role of discourse in socio-technical transitions has drawn on the concept of framing (Snow and Benford, 1988, Snow et al., 1986), as developed within the social movement literature. From this perspective, framing is a deliberative, communicative process through which actors seek to mobilise a consensus and collective action around a given issue (Snow and Benford, 1988, Steinberg, 1998). The frame constructed and communicated through this process can be defined as "an interpretative schemata that signifies and condenses 'the world out there' by selectively punctuating and encoding objects, situations, events, experiences, and sequences in one's present or past environments" (Snow and Benford, 1992: 137). Adapting these concepts, transition research has focused on the framing of socio-technical systems (Leach et al., 2010); for example, the energy regime (Geels, 2014) or the sharing economy niche. Hence, niche and regime actors are thought to participate in discourses to advance "a particular framing of a system and its dynamics, and suggest particular ways in which these should develop or transform to bring about a particular set of outcomes" (Hermwille, 2015: 10). Furthermore, Geels (2014), drawing on the research of Snow and Benford (1988), identifies three sub-frames employed within the system framing process:

- the *diagnostic* sub-frame – identifying and defining problems faced by the niche or regime;
- the *prognostic* sub-frame – offering and advancing solutions to these problems in the form of niche innovation or regime reconfiguration;
- and, the *motivational* sub-frame – establishing the rationale for taking action to address the problem.

Hence, when an actor frames a niche, such as the sharing economy, they outline of how and why they would like to see it develop (Franceschini and Pansera, 2015); in other words, they sketch out their preferred pathway for the niche.

In this paper I bring together selected concepts from these two strands of transitions research to analyse the online sharing economy discourse. I focus on how framing – including the diagnostic, prognostic and motivational sub-frames – is employed by niche and regime actors to empower (Smith and Raven, 2012) and resist (Geels, 2014) the development of the sharing economy niche (as shown in Fig. 1). Furthermore, based on the framings identified within the online discourse I sketch out some potential pathways for the development of sharing economy.

2.2. The Sharing Economy

It is extremely challenging to offer a definition of the 'sharing economy' which retains clarity whilst encompassing the variety of ways in which the term is used in practice (Schor, 2014). Perhaps central to these definitional challenges is the contested meaning of the word sharing (Belk, 2014). For example, the common sense meaning of sharing excludes forms of exchange where a monetary benefit accrues to one or more party, and hence innovations based on peer-to-peer asset rental (e.g. Airbnb) could be excluded from the sharing economy. However, if one considers that access to an asset can be shared (rather than the asset itself), the accrual of monetary benefit becomes irrelevant and innovations based on peer-to-peer asset rental are included within the sharing economy. Further complicating efforts to define the sharing economy are a range of overlapping terms – each used to a greater or lesser extent interchangeably – including collaborative consumption, the collaborative economy, the gig economy and the mesh. However, within this paper a rigorous definition of the sharing economy is not needed, rather competing definitions within discourse are analysed as alternative framings.

Turning now to outline the development of the sharing economy and surrounding discourse (descriptions of exemplar sharing economy platforms referred to in this and following sections can be found in Table 1). "Sharing has probably been the basic form of economic distribution in hominid societies for several hundred thousand years. It is

based in human biological behaviours … and becomes a powerful force for solidarity between communities" (Price, 1975: 12–13). Sharing also remains a mundane and daily practice across the world today (Wittel, 2011); from the family sharing the fruits of their labours, to the community sharing access to a water supply. So, the emergence of digitally mediated forms of sharing should be unsurprising. Rather, it is the current framing of these forms of sharing as a radical and disruptive act that might be considered remarkable (Belk, 2014). However, advocates such as Botsman and Rogers (2010) do frame these forms of sharing as remarkable; identifying the origins of a digitally mediated sharing economy in the late 1990s and early-mid 2000s. During this period online platforms emerged which enabled individuals to establish peer-to-peer relationships at a previously unprecedented scale. Prominent examples of these pioneers of what would become known as the sharing economy include: Ebay, Craigslist, Freecycle and Couchsurfing. Business to consumer models of Internet mediated interaction also emerged which enabled individuals to access (rather than own) assets, perhaps the most prominent of these being the car rental/sharing service offered by Zipcar.

Meanwhile, the term 'the sharing economy' was used by scholars to describe the growing phenomenon of citizens freely sharing skills and knowledge in collaborative online endeavours, such as Wikipedia and open source software development (Ito, 2004). It appears that the concept of the sharing economy entered wider public discourse around 2011–2012; Fig. 2 shows a growing number of references to the sharing economy in newspaper articles between 2011 and 2014. The closely related term 'collaborative consumption' appears to have entered into media discourse around 2010 (see Fig. 2); probably following the publication of "What's Mine is Yours: How collaborative consumption is changing the world" (Botsman and Rogers, 2010). A book which played a central role in framing a diverse group of online platforms facilitating peer-to-peer forms of economic activity as a single field of innovation. However, references to collaborative consumption have been subsequently surpassed by references to the sharing economy, emphasising that the sharing economy has become the predominant concept (see Fig. 2).

In parallel with growing media interest, a sharing economy niche has also developed. Within the global level of the niche, advocacy organisations have been established including OuiShare (France), Peers (USA), Sharable (USA), The People Who Share (UK) and Collaborative Consumption (Australia); (see Table 2 for brief descriptions). These organisations promote networking and facilitate knowledge sharing between sharing economy entrepreneurs, and employ discursive strategies that seek to empower a diverse field of innovations which interact with multiple regimes. Furthermore, other global niche actors have also emerged including "innovation intermediaries and funders promoting the development of the sharing economy (e.g. Nesta and the Nominet Trust [in the UK]); and, national associations of sharing economy organisations seeking to develop best-practice (e.g. ShareCo in the UK)" (Martin et al., 2015: 243).

Conceptualising the sharing economy niche at the field level is more challenging given the divergent framings of its scope. Further complicating the picture, the sharing economy is generally understood to be underpinned by a common general purpose technology; "the online platform which enables citizens to engage in peer-to-peer (P2P) forms of economic activity at an unprecedented scale" (Martin et al., 2015: 243). Furthermore, this technology has been applied by commercial actors and grassroots communities seeking to achieve very different objectives, and to enact very different values and institutional logics (Martin et al., 2015). However, if we follow the prevailing framing of the sharing economy (i.e. Botsman and Rogers, 2010), the field level of the niche can be conceptualised as incorporating four groups of innovations (see Table 1 and Fig. 3): accommodation sharing platforms; car and ride sharing platforms; peer-to-peer employment markets; and, peer-to-peer platforms for sharing and circulating resources. The diversity of these platforms creates relationships between the niche and
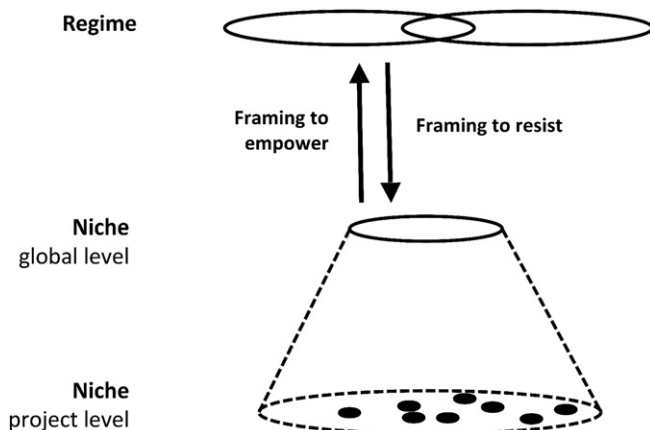

Fig. 1. The framing of niche innovations with the MLP.

Table 1
Groups of innovations within the sharing economy niche; adapted from Martin et al. (2015).

Groups of innovation	Corresponding regimes	Examples of sharing economy platforms	Description
Accommodation sharing platforms	Tourism, ICT	Airbnb	A peer-to-peer marketplace for people to rent out residential accommodation (including their homes) on a short term basis.
		Couchsurfing	An online community of people who offer free short-term accommodation to fellow community members.
Car and ride sharing platforms	Mobility, ICT	Easy Car Club and Relayrides	Peer-to-peer car rental platforms.
		Lyft and Uber	Peer-to-peer platforms providing taxi and ridesharing services.
		Zipcar	A business-to-consumer vehicle rental platform offering per hour rental of vehicles located within communities.
Peer-to-peer employment markets	Employment, ICT	PeoplePerHour and Taskrabbit	Peer-to-peer marketplaces for micro employment opportunities (i.e. piecemeal contracts or hourly work).
Peer-to-peer platforms for sharing and circulating resources	Waste disposal, production-consumption, ICT	Freecycle	A peer-to-peer platform which enables people to freely and directly give unwanted and underutilised items to others in their local area.
		Peerby and Streetbank	Peer-to-peer platforms which enable communities to freely share durables goods, skills and knowledge.
		Ebay	An online marketplace for people to sell their second-hand items to others.

multiple regimes (see Table 1 and Fig. 3). For example, car and ride sharing platforms seek to introduce an alternative business model to the mobility regime, and likewise accommodation sharing platforms align to the tourism regime. Furthermore, as all four groups of innovations are socio-digital in nature, each group also aligns with the ICT (Information and Communication Technology) regime. Finally, looking at the scale of activity across the project level as a whole, the niche appears to consist of: a small number of large-scale commercial platforms with international reach (e.g. Airbnb, Uber); and, a much larger number of small scale peer-to-peer platforms (e.g. Taskrabbit, Streetbank, Freecycle, Easy Car Club) run by a mix of commercial, social enterprise and non-profit actors.

2.3. Research Methods

The research presented in this paper employed the exploratory methods of online ethnography (Boellstorff et al., 2012), to gather and analyse online data containing framings of the sharing economy niche; specifically 224 online articles and reports written by advocates, critics and commentators. Unsurprisingly, given the sharing economy is an innovation driven by digital technologies the associated online discourse consists of vast amounts of qualitative data.[1] Hence, a major challenge in this research was developing an appropriate approach to sampling and analysing the online data available (Boellstorff et al., 2012). Furthermore, the sharing economy is an understudied field of innovation (Martin and Upham, 2015) and the theoretical resources available to aid the development of data sampling and analysis approaches are limited. Hence, I adopted an exploratory and iterative research approach consisting of two interlinked stages of data gathering and data analysis focusing on: (1) the framings of niche actors; and, (2) the framings of regime actors. During both stages English language online materials originating from multiple countries were sampled, reflecting the global reach of sharing economy platforms (e.g. Airbnb operates in over 190 countries) and the consequently global nature of the sharing economy discourse. However, by necessarily focusing on English language material an Anglo-American bias was introduced to the data. In particular, voices from the sharing economy discourse in the global south were largely excluded from the analysis. Hence, important opportunities remain for research comparing the characteristics of sharing economy discourses across cultures, geographies and economies with contrasting characteristics.

2.3.1. Data Gathering

The first stage of data gathering focussed on actors within the sharing economy global niche and took a purposive sample of 146 online articles. Searches of Twitter were used to identify 18 high-profile organisations engaged in the online sharing economy discourse. Based upon a review of the websites of these organisations six were selected as sources of data (see Table 2). The organisations were selected with the objective of identifying a diverse range of framings of the sharing economy. Hence, the following were included: organisations publishing online sharing economy magazines including articles written by authors with diverse perspectives; and, organisations adopting distinctive perspectives which added to the richness of the data.

The websites of the six organisations were then reviewed and a purposive sample of 132 articles was selected (see Supplementary Data 1, Table 1, for examples). The websites differed in content and design and hence the approach to sampling data varied from website to website. The sampling and analysis of data were intertwined and proceeded in parallel, with articles sampled and analysed from a given website until theoretical saturation (Bowen, 2008) was reached. Furthermore, selected hyperlinks and references within the articles were also explored (i.e. snowballing) and a further 14 articles written by niche actors were identified.

The second stage of the research focussed on regime actors, and actors working at the boundary between the niche and regime, including the media, trade associations in sectors being disrupted by the sharing economy, innovation intermediaries and organisations within interests in consumer behaviour. The data gathered included 78 online articles, newspaper articles, press releases, webpages and reports (see Supplementary Data 1, Table 2, for examples). The starting point for data gathering was a set of 27 articles and reports identified through snowballing during the first stage of the research. Based on analysis of these data, key events and issues arising at the interface between the sharing economy and the regime were identified including: the UK government review of the sharing economy; and regulatory and industry resistance to Airbnb and Uber across the USA and Europe. Using the Google search engine 51 further articles relating to these events and issues were identified and subsequently analysed.

2.3.2. Data Analysis

Throughout both stages of the research data were imported in to NVIVO, where coding identified emergent framing themes. The initial coding structure included categories for identifying overarching framings of the sharing economy and diagnostic, prognostic and motivational sub-framings. As the data gathering and analysis progressed this
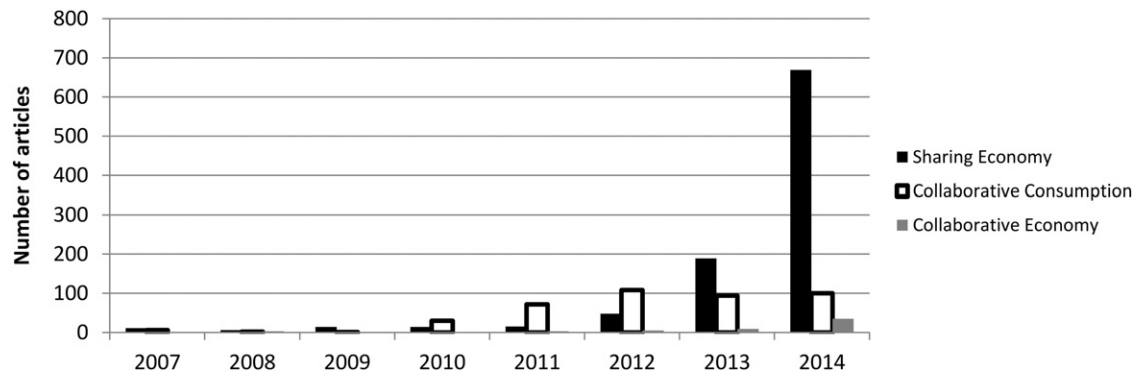
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[1] As of 7th April 2015 the Google search engine returned approximately 863,000 webpages for the search query "sharing economy" and approximately 358,000 webpages for the search query "collaborative consumption".

Fig. 2. Number of newspaper articles referring to the 'Sharing Economy', 'Collaborative Consumption' and the 'Collaborative Economy' by year. Results were obtained from searches of the LexisNexis database of newspaper articles.

structure was enriched within emergent concepts derived from the data (see Fig. 4 for examples). Furthermore, there was an on-going interplay between the analysis of the framings of niche and regime actors; as articles written by niche actors often made reference to the framings employed by regime actors (and vice versa). Six candidate framings (presented in Section 3) were developed during the analysis through an on-going and iterative process of: (1) identifying and refining emergent framing and sub-framing themes; and, (2) connecting aligned framing and sub-framing themes (see Fig. 4 for examples). Hence, the candidate framings are a composite of those employed by multiple authors associated with various sharing economy organisations.

Finally, I re-analysed 75 randomly selected articles (approximately 33% of the original data set) to identify if and how the candidate framings were employed by niche and regime actors. Almost all of the articles re-analysed employed one or more framings in a complete or partial form. Hence, this secondary analysis confirmed that the process of constructing the candidate framings had not distorted "the core logics" of the framings present within the empirical data (Berg and Hukkinen, 2011:155). Finally, I conducted limited further validation of the framings through observations of Ouishare Fest 2015; a sharing economy conference and knowledge sharing event attended by activists, social innovators, entrepreneurs and innovation intermediaries. Again almost all of the 30 speakers observed at the event employed one or more framings in a complete or partial form.

3. Results and Discussion

The analysis identified actors seeking to empower the niche employed three framings (summarised in Fig. 5) — the sharing economy is: (1) an economic opportunity; (2) a more sustainable form of consumption; and, (3) a pathway to a decentralised, equitable and sustainable economy. Whilst, actors resisting and critiquing the development of the niche employed three different framings (summarised in Fig. 6) — the sharing economy is: (4) creating unregulated marketplaces; (5) reinforcing the neoliberal paradigm; and, (6) an incoherent field of innovation. Below each framing is outlined in turn, alongside details of which actors employed the framing and the connections to other framings.

Examples of empirical data in which each framing is employed can be found in Supplementary Data 2.

3.1. Framing to Empower the Sharing Economy Niche

3.1.1. Framing 1: The Sharing Economy is an Economic Opportunity

The first framing (summarised in Fig. 5) presents the sharing economy as a solution to the implicit and unstated problems of providing employment and fostering greater economic activity [*implicit diagnostic sub-framing*]. In this framing the sharing economy consists of peer-to-peer internet platforms (including Airbnb, Uber, TaskRabbit, Just Park...) which empower individuals to monetise their underutilised assets, time and skills [*prognostic sub-framing*]. Individuals working or earning money within the sharing economy are celebrated as micro-entrepreneurs. Whilst, the sharing economy itself is heralded as: a disruptive business model innovation driven by digital technologies; and, a major commercial opportunity for entrepreneurs, companies, industries and/or countries. The continuing growth of sharing economy is framed as desirable or necessary [*motivational sub-framing*] on the basis that: the sharing economy promotes individual economic empowerment; the digital technologies driving the sharing economy make it inevitable; the sharing economy is a response to changing patterns of consumer and worker behaviour; and, the sharing economy promotes more efficiency utilisation of resources.

Within the niche this framing was employed by Peers, a USA based advocacy organisation funded by for-profit organisations including Airbnb, to highlight the potential of the sharing economy to create new forms of work (i.e. to disrupt the employment regime). In particular, Peers' framing focussed on the new forms of work created by Airbnb and Uber, within the tourism and mobility regimes respectively. Framing the sharing economy in solely or primarily economic terms was also prominent amongst regime actors. The UK Government focussed on the potential of the niche to increase the opportunities for micro-entrepreneurship and labour market flexibility across the employment regime. Whilst, several niche actors and many ICT regime actors (including the technology press and for-profit consultancies) focussed on the commercial opportunities arising from integrating the sharing economy into the ICT regime. Furthermore, these actors often only

Table 2
Number of online articles sampled from the websites of sharing economy global niche organisations.

| Organisation name	Brief description	Number of articles analysed
Collaborative Consumption	An advocacy and knowledge sharing organisation led by prominent advocate Rachel Botsman.	31
Ouishare	A predominately European network of advocates and innovators.	20
Peers	A USA based advocacy organisation funded by sharing economy organisations.	29
Shareable	A non-profit, USA based advocacy and knowledge sharing organisation.	23
Share the Worlds Resources	A social movement organisation advocating greater sharing within and between nations.	23
The People Who Share	A UK based advocacy organisation with links to a sharing economy comparison website.	6
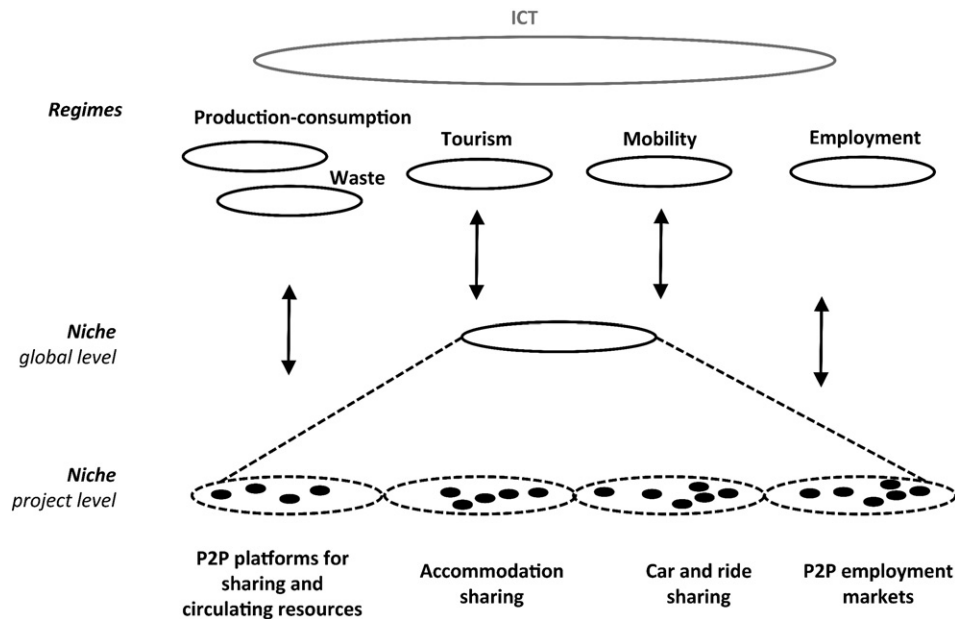
Fig. 3. The sharing economy niche and aligned regimes; adapted from Martin et al. (2015). *The arrows indicate the alignment between groups of innovations and regimes.*

used the prognostic sub-framing; hence offering the sharing economy as solution of self-evident value and relying on their audiences' familiarity with the institutional logic of the market to fill in the gaps.

3.1.2. Framing 2: The Sharing Economy is a More Sustainable Form of Consumption

The second framing (summarised in Fig. 5) identifies the environmental and social impacts of unsustainable consumer behaviour within capitalist economies as the problem to be addressed [*diagnostic sub-framing focussed on the consumption-production and waste regimes*]. Hence, the sharing economy is heralded as a new and sustainable form of consumption based on individuals accessing rather owning resources [*prognostic sub-framing*]. Internet platforms (e.g. Airbnb, Couchsurfing, Ebay, Freecycle, RelayRides...) are presented as enabling peer-to-peer 'sharing' (or access) based models of consumption at a previously unprecedented scale. Here, 'sharing' is defined very broadly to include peer-to-peer renting, sharing, lending, selling and giving. Whilst, trust between peers (e.g. a host renting a room to a stranger for a night using Airbnb) is established through online reputation services (e.g. 5* rating systems). Once again the sharing economy itself is framed as a disruptive business model innovation driven by digital technology. Whilst, the sharing economy is presented as a desirable and necessary innovation [*motivational sub-framing*] on the basis that it: empowers individuals; creates economic, social and environmental value; enables 'sharing' practices which are fundamental aspects of human nature; and, enables more efficiency utilisation of resources.

This framing was primarily employed by niche actors, including advocates writing articles published by Collaborative Consumption and Sharable, to highlight the potential of the sharing economy to transform the waste and production-consumption regimes. However, some niche actors employed only diagnostic and motivational sub-framing, and hence distanced the sharing economy from a critique of the unsustainable nature of prevailing consumption practices. Furthermore, the media and consumer research agencies (actors within the production-consumption regime) employed diagnostic sub-framing in isolation. Perhaps, in order to position the sharing economy in a way that aligns with the prevailing values and norms of the regime. Furthermore, there are considerable interconnections between this framing and the *economic opportunity* framing (see above and Fig. 5). In particular, the diagnostic sub-framings overlap with both: seeking to establish the transformative potential of the sharing economy by presenting it as a

disruptive innovation; and, arguing that peer-to-peer Internet platforms form the underpinning infrastructure of the sharing economy. However, the framings diverge, with the *more sustainable consumption* framing employing broader diagnostic and motivational sub-framings that address concerns beyond the economic system, including social and environmental value.

3.1.3. Framing 3: The Sharing Economy is a Pathway to a Decentralised, Equitable and Sustainable Economy

In the third framing (summarised in Fig. 5) a still broader *diagnostic sub-framing* identifies that centralised capitalist economies are driving on-going environmental degradation, climate change and growing inequality (trends at the landscape level of the MLP). The sharing economy is then offered as a diverse field of innovations which: promote sharing and collaboration between citizens; empower citizens, communities and grassroots organisations; and, decentralise power structures across the economy and society [*prognostic sub-framing*]. Digital innovations with the potential to disrupt the consumption-production, finance and education regimes (amongst many others) are considered part of the sharing economy. For example: peer-to-peer access based models of consumption (as discussed above), the maker movement (e.g. fablabs), peer-to-peer finance, open knowledge and open data. Whilst, in some instances the framing extends the scope of the sharing economy still further to include offline citizen driven social innovations including, for example: cohousing, cooperative organisations, community currencies and local food provision. The sharing economy is presented as necessary and desirable [*motivational sub-framing*] on the grounds that it: offers a pathway to a 'new economy' built around concern for people and the environment; and, is driven by the values of liberty, democracy, social justice and environmental justice.

This framing was employed by a range of niche actors – including authors writing for Ouishare, Share the Worlds Resources, and Shareable – to highlight the potential of the sharing economy to transform the prevailing economic paradigm (part of the landscape). However, there was no evidence of this framing being employed by regime actors. Niche actors tended to employ this framing in a complete form and often in conjunction with a critique of the development of the sharing economy to date (see framing 5 below). Furthermore, the concept of the collaborative economy was often used in place of the sharing economy, in an effort to delineate and distance the advocate's framing from the more commercially orientated framings of the sharing economy described
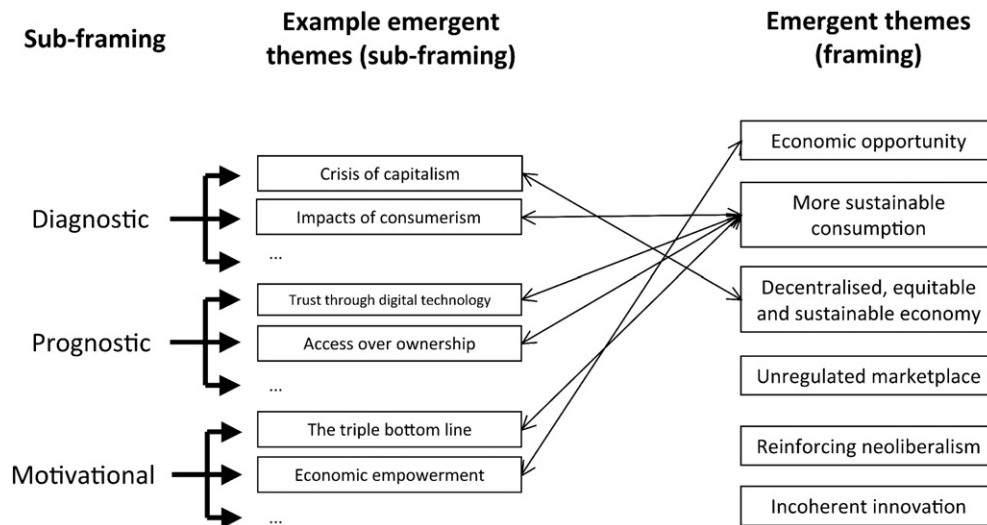
Fig. 4. Overview of coding structure and examples of emergent themes.

above. However, this framing remains strongly shaped by the technocentric perspectives that pervade the *economic opportunity* and *new consumption* framings. In particular, I suggest that this framing is grounded in the assumption that the Internet is an inherently decentralised, libertarian, democratic network which empowers citizens. Hence, this framing risks overlooking the role government and institutions in social change.

3.2. Framing to Resist and Critique the Sharing Economy Niche

3.2.1. Framing 4: The Sharing Economy Creates Unregulated Marketplaces

The fourth framing (summarised in Fig. 6) presents the sharing economy as a growing network of unregulated digital marketplaces that pose a threat to regulated businesses and a risk to consumers [*diagnostic sub-framing focussed on the niche*]. Sharing economy platforms, in particular Airbnb and Uber, are critiqued for: transferring risk to consumers; creating unfair competition; establishing illegal, black or grey markets; and promoting tax avoidance. Actors employing this framing call for sharing economy platforms to be regulated on the same basis as established businesses, and to proactively adapt to the established practices of the regime [*prognostic sub-framing*]. Such calls are justified on the grounds of reducing risks to consumers and protecting the interests of established industries [*motivational sub-framing*].

Aspects of the diagnostic and prognostic sub-framings were employed by niche actors and integrated into broader critiques of the sharing economy (as presented in framing 5 immediately below). However, this framing was predominately employed in a complete form by actors within the tourism and mobility regimes seeking to resist the development of the sharing economy; in particular, by the hotel and taxi industries seeking to resist Airbnb and Uber respectively. Furthermore, media actors (particularly newspaper writers) employed this framing as a counter point to the *economic opportunity* framing, highlighting that although Airbnb and Uber are commercial successes they also have adverse social impacts.

3.2.2. Framing 5: The Sharing Economy Reinforces the Neoliberal Economic Paradigm; A Sharing Society is Needed

This framing (summarised in Fig. 6) provides a critical perspective on the sharing economy (as embodied in the *Economic Opportunity* and *Sustainable Consumption* framings), and its role in reinforcing the neoliberal economic paradigm [*diagnostic sub-framing focussed on the niche*]. In particular, limitations and negative impacts are highlighted including: corporate co-option of the sharing economy (e.g. Airbnb and Couchsurfing); the casualisation of labour within the sharing economy

(e.g. Uber and Taskrabbit); a lack of concern with issues of environment sustainability; the assumption embedded within the sharing economy's peer-to-peer model that individual actions alone lead to social change; and, the exclusivity of the sharing economy (i.e. only those who already own assets can share them). Hence, this framing advocates that a 'real' sharing economy or a sharing society is needed [*prognostic sub-framing focused on the landscape*]. One of two visions is then offered: either, a sharing economy as described in the *decentralised economy* framing; or, a sharing society built upon resource sharing at the local and national scales (i.e. public services) and at the international scale (i.e. transferring resources from developed to developing countries). Again, the values of social justice, environmental justice and equality are called upon to justify the critique and establish the need to create a real sharing economy [*motivational sub-framing*].

This framing tended to be employed in a complete form by niche actors, writing for Share the Worlds Resources and Sharable, to highlight the need to transform both the sharing economy niche and the prevailing neoliberal economic paradigm (a feature of the landscape). There was no evidence of this framing being employed by regime actors. Furthermore, the variations of this framing offer two rather different visions of what a sharing economy or society would entail; either emphasising the need for decentralisation and citizen empowerment (as per the *decentralised economy* framing), or emphasising the need for government action and political change. Hence, suggesting the shaping of the two variations by libertarian and social democratic ideologies respectively. Furthermore, there are other connections between this framing and the *decentralised economy* framing, in particular around: the need to promote offline forms of sharing and collaboration; and, the motivational role of the values of social and environmental justice.

3.2.3. Framing 6: The Sharing Economy is an Incoherent Field of Innovation

The final framing (summarised in Fig. 6) focuses on the contradictions within, and confusion around, the sharing economy. Hence, the sharing economy is presented as an incoherent field of innovation [*diagnostic sub-framing focussed on the niche*] which: has little to do with sharing; is framed very differently by different actors; creates a mix of positive and negative impacts; and, is discussed using confusing and interrelated terminology. This framing calls for: stronger definitions of the scope of the sharing economy; the formation of a more coherent sharing economy movement; and, greater social networking and collaboration between public, private and non-profit sector sharing economy actors (i.e. niche development processes) [*prognostic sub-framing*]. The motivational rationale for seeking greater coherence is unstated [*implicit motivational sub-framing*], and hence seems to rest upon the assumption

	Diagnostic	Prognostic	Motivational
Economic Opportunity	• *Promoting economic growth*	• Commercial Opportunity • Micro-entrepreneurs • Monetising underutilised capacity	• Economic empowerment • Inevitable technological change • Changing patterns of behaviour
Sustainable Consumption	• Unsustainable consumer behaviour	• Peer-to-peer platforms • Disruptive innovation • Access-based consumption • Trust	• Efficiency • Sharing is fundamental human behaviour • The triple bottom line
Decentralised, Equitable and Sustainable Economy	• Centralised capitalist economies • Climate change • Inequality	• Decentralising the economy • Digital innovation • *Social innovation*	• Individual empowerment • Pathway to a new economy • Social and environmental justice • Liberty and democracy

Fig. 5. Summary of framings which empower the sharing economy niche.

that forging a coherent sharing economy identity will increase the likelihood of growth and/or catalysing transformative change.

This framing was employed by a range of niche and regime actors seeking to summarise or make sense of the confusing nature of the discourse surrounding the sharing economy niche. Where employed by niche actors – including Collaborative Consumption and Sharable – the need to broaden the scope of the sharing economy to include social innovations (see *decentralised economy* diagnostic sub-framing) was

	Diagnostic	Prognostic	Motivational
Unregulated Marketplaces	• Risk transference • Unfair competition • Tax avoidance • Illegal / black / grey markets	• Regulation of the sharing economy • Adaption of the sharing economy to regime practice	• Protecting established regime interests • Reducing risk to consumers
Reinforcing Neoliberalism	• Corporate co-option • Casualisation of labour • Lack of concern with sustainability • Exclusivity	• A 'real' *(libertarian)* sharing economy • A *(social democratic)* sharing society	• Social and environmental justice • Equality
Incoherent Innovation	• Little to do with sharing • Diverse meanings • Mixed impacts • Confusing terminology	• Coherent sharing economy movement • Niche structures and processes	

Fig. 6. Summary of framings which resist and critique the sharing economy niche.

emphasised. However, it remains unclear how this might lead to a more coherent niche identity. Regime actors, particularly writers reporting on digital technologies within the mainstream media, employed the diagnostic sub-framing as a subtle form of critique; raising questions about how those outside the field can relate to the seemingly unrelated forms of innovation.

3.3. Implications for Sustainability Transitions

The analysis above shows that niche actors, and actors across the production–consumption, tourism, mobility, employment and ICT regimes employ conflicting framings as they compete to shape the development of the sharing economy (see Fig. 7 and Fig. 8). Regime actors tended to frame the sharing economy in commercial terms (*economic opportunity* and *unregulated marketplaces*) (see Fig. 9). Niche actors tended to employ broader framings emphasising concerns for issues of social and environmental value (*sustainable consumption*) and social and environmental justice (*decentralised economy and reinforcing neoliberalism*) (see Fig. 9). However, alignment between the framings of niche and regime actors can be identified in four areas; hinting at potential pathways for the future development of the sharing economy.

First, niche-regime alignment was evident for aspects of the *economic opportunity* framing which emphasise the potential of the sharing economy to create new forms of work and to create new commercial opportunities through integration into the ICT regime (see Fig. 7). Hence, suggesting a pathway of corporate co-option, where the sharing economy develops as a technology-driven, commercial innovation: increasing labour market flexibility by eroding workers' rights; commercialising aspects of life that were previously beyond the reach of the market; and, creating paradoxical social impacts, economically empowering some individuals whilst reinforcing structural inequalities. Secondly, niche-regime alignment was evident for the *sustainable consumption* diagnostic sub-framing which heralds the new forms of peer-to-peer consumption emerging within the sharing economy (see Fig. 7). However, taken in isolation this sub-framing just advocates a new and additional form of consumption unconcerned with issues of sustainability. Hence, suggesting a pathway where the sharing economy influences but does not disrupt the consumption–production regime,

resulting in limited sustainability benefits. Thirdly, niche-regime alignment was evident for the *unregulated markets* framing (see Fig. 8); suggesting a pathway where the sharing economy becomes more heavily regulated, tempering the hyper-liberalism of peer-to-peer marketplaces such Uber and Taskrabbit. Finally, niche-regime alignment was also evident for the *incoherent innovation* framing (see Fig. 8); suggesting a further pathway where the concept and legitimacy of the sharing economy collapses under the weight of its own contradictions and paradoxes.

Identifying the pathways above, raises an obvious question – which pathway is the sharing economy currently taking? It is five years since the sharing economy concept emerged rooted in a critique of hyper-consumption (Botsman and Rogers, 2010). Since then, it has been successfully reframed by regime actors as an economic opportunity; a means of opening up new marketplaces and creating highly flexible and insecure forms of employment. Such a radical reframing highlights the powerful forces of discursive resistance faced by niches of eco-innovation (Geels, 2014). Furthermore, this reframing also highlights the malleable nature of the digital technologies which underpin the sharing economy. More specifically, these technologies hold the potential both to create niches of eco-innovation (*decentralised economy framing*), and to reinforce the existing socio-technical structures of the regime (*economic opportunity framing*). With regime reinforcement likely to be favoured by the uneven power relationships that characterise niche-regime interactions (Avelino and Rotmans, 2009, Smith and Raven, 2012). Hence, I suggest the current trajectory of the sharing economy niche seems unlikely to disrupt unsustainable practices across multiple regimes. Rather, it appears that the niche is developing along a path of corporate co-option, fitting and conforming to the established structures of the regime (Smith and Raven, 2012). More broadly, there are growing expectations that digital technologies will drive sustainability transitions through the 'smart' agenda (smart cities, smart grids, smart homes etc.). However, given the malleability of digital technologies discussed above, I suggest that such expectations should be moderated (Viitanen and Kingston, 2014); giving further cause for concern that we are not taking the action needed to transition to sustainability (Geels, 2013).

However, grassroots niche actors are seeking to open up a sharing economy pathway aligned with a transition to sustainability. Here, in
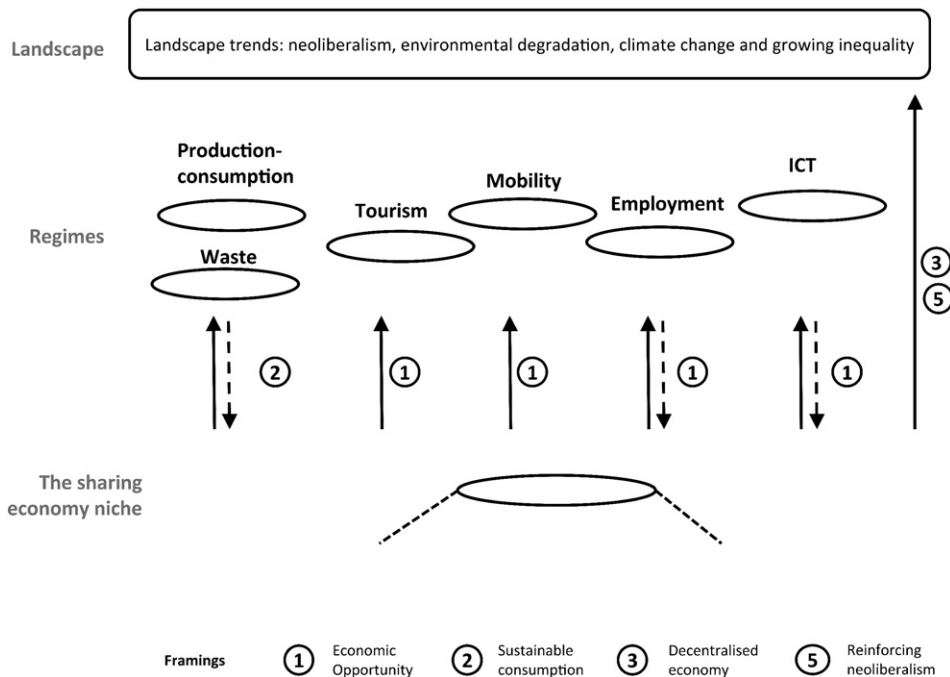

Fig. 7. A multi-level perspective on framings empowering the sharing economy niche. Solid arrows indicate where niche actors identify opportunities for the sharing economy to transform regimes and the landscape. Dashed arrows indicate regime actors identifying opportunities to integrate the sharing economy into the regime.
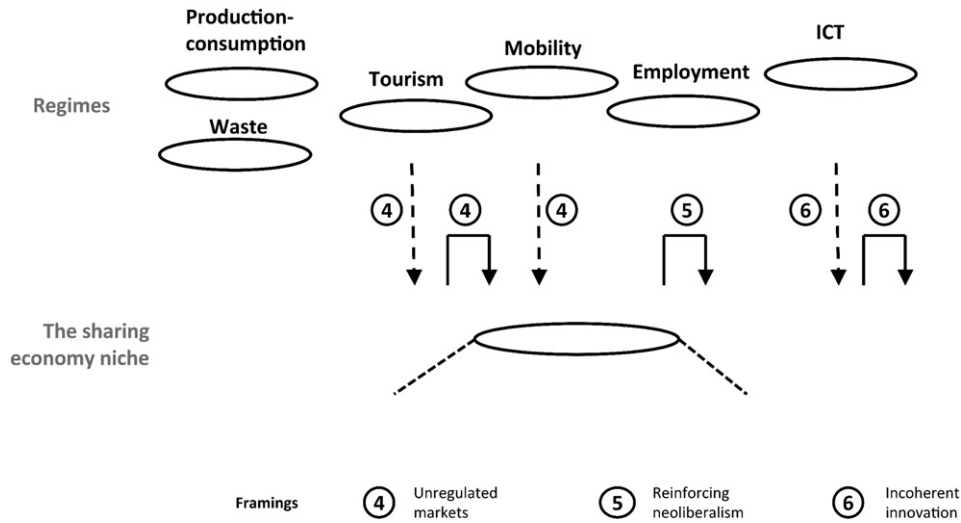
Fig. 8. A multi-level perspective on framings resisting and critiquing the sharing economy niche. The solid arrows indicate where niche actors are critiquing the development of the sharing economy. Dashed arrows indicate regime actors resisting the development of the sharing economy niche.

line with the arguments of Heinrichs (2013) and Schor (2014), the sharing economy draws together a seemingly disparate field of social and digital innovations, based on sharing and collaborative practices, to drive the transition to sustainability. To exert greater influence over the development of the sharing economy, niche actors might benefit from developing alternative framings. Currently, the economic opportunity framing has a superior position within the sharing economy discourse. It is congruent with the 'success stories' of Airbnb and Uber, and it is coherent and simple; presenting the sharing economy as an innovation of self-evident value within the digital market economy. The *sustainable consumption* and *decentralised economy* framings appear to be considerably weaker. They are not supported by 'success stories' at significant scale, and they are incoherent and complex; often presenting the sharing economy as a collection of innovations seemingly connected only by a common use of digital technologies. However, within the online sharing economy discourse there are on-going efforts to formulate stronger, more coherent grassroots framings. In particular, the emergence of the concept of the collaborative economy seeks to distance the *decentralised economy* framing from the more commercially orientated framings of the sharing economy. However, developing alternative terminology at the global niche level is unlikely to be sufficient to influence the regime. It is not enough to present visions of decentralised, digital utopias. Advocates need to be more specific about which socio-digital innovations could address which social and environment challenges, and more convincingly articulate how these innovations could scale up.

4. Conclusions

The Silicon Valley success stories of Airbnb and Uber have catalysed a vibrant sharing economy discourse, participated in by the media, ICT industries, venture capitalists, entrepreneurs and grassroots activists. Within this discourse the sharing economy is framed in contrasting and contradictory ways; albeit with a common expectation that the sharing economy niche will disrupt multiple regimes by radically decentralising economic activity. Drawing on sustainability transitions and framing theory, I have presented an empirical analysis of a sample of this discourse. The analysis identified actors seeking to empower the niche employ three framings — the sharing economy is: (1) an economic opportunity; (2) a more sustainable form of consumption; and, (3) a pathway to a decentralised, equitable and sustainable economy. Whilst, actors resisting the development of the niche employ three different framings — the sharing economy is: (4) creating unregulated marketplaces; (5) reinforcing the neoliberal paradigm; and, (6) an incoherent field of innovation. Furthermore, regime actors tended to frame the sharing economy in predominately commercial terms (1 and 4). Whilst, niche actors tended to employ broader framings (2, 3 and 5), seeking to open up a pathway for the sharing economy aligned with a transition to sustainability. However, in the five years since the emergence of a sharing economy concept rooted in a critique of hyperconsumption (Botsman and Rogers, 2010), it has been successfully reframed by regime actors as purely an economic opportunity. Hence, I have suggested that if the sharing economy continues along this
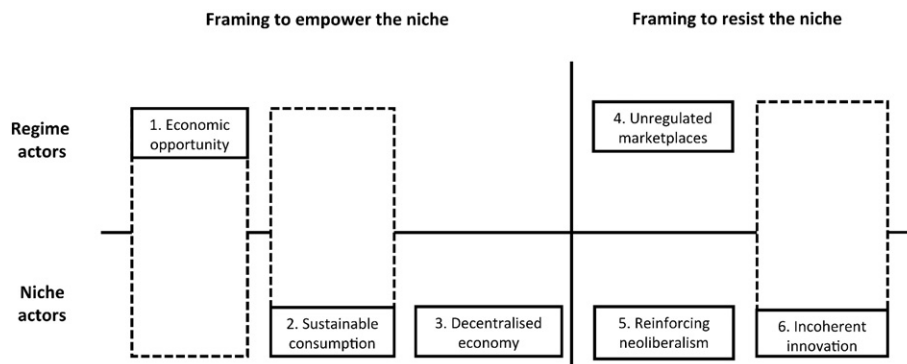

Fig. 9. Framings of the sharing economy employed by regime and niche actors. Solid lines indicate that framings are extensively employed. Dashed lines indicate that framings are employed to a limited extent.

current pathway of corporate co-option it is highly unlikely to drive a transition to sustainability.

In light of the results above, I suggest that the sustainability transitions research community can view the sharing economy from two distinct perspectives. First, the sharing economy can be viewed as a niche of socio-digital experiments, with the paradoxical potential to: promote more sustainable consumption and production practices; and, to reinforce the current unsustainable economic paradigm. Hence, there is a considerable need for research exploring how the sharing economy niche could be steered toward a pathway aligned with a transition to sustainability. Secondly, the sharing economy can also be viewed as a niche aligned with on-going processes integrating digital technologies into socio-technical structures across the regime. Here, perhaps the most prominent opportunity lies in research developing understanding of the role of digital technologies in the dynamics of transitions. For example, research might investigate how digital technologies have enabled Airbnb and Uber to rapidly establish a presence in hundreds of cities across the globe, to an extent outpacing regime resistance. Finally, looking beyond the field of sustainability transitions, there is considerable need to develop the nascent sharing economy literature. In particular, the priority should be empirical research which critically analyses the nature and impacts of the sharing and collaborative economies in their many and varied forms.

Acknowledgements

Appendix A. Supplementary Data

Supplementary data to this article can be found online at http://dx.doi.org/10.1016/j.ecolecon.2015.11.027.

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