The Sharing Economy in the Global South and Sustainability Transitions

An Assessment of the Sustainability Claims
and Sustainability Transitions of the Sharing Economy
in Metro Manila, Philippines

Maria Cathrina Margarita Roxas

Supervisors

Oksana Mont

Yuliya Voytenko

LUND UNIVERSITY

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Acknowledgements

It's almost poetic justice that I write this over 70-page thesis on the sharing economy. Growing up with an identical twin sister, sharing did *not* come easy. We get the same things but I've always wanted more (which partly explains why I am heavier and taller than her). I've learned well from her. As an adult, I can't say sharing has become second nature but as they say, "the struggle is real." Maybe this is atonement for my selfishness.

I am a big fan of technology and innovation. But my interest in the sharing economy stems from the belief that a sustainable future would essentially require society to go back to the basics. The sharing economy espouses the simple ideal of maximising resources by sharing. How difficult could that be? From personal experience, true sharing is difficult but achievable. I started this thesis with skepticism if the sharing economy can indeed contribute towards sustainability. Now I end it with realistic optimism, but not towards the sharing economy *per se*. But that we humans, we who are responsible for the destruction of this earth, are also capable of correcting our mistakes, no matter how winding the path may be. The sharing economy is a result of human ingenuity and learning from our past. I could only hope that it will be steered towards sustainability.

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Abstract

The sharing economy, new and still evolving, is being put forward as a potentially disruptive sustainable solution to economic, social and environmental problems. Its design is mainly shaped and analysed by people from the Global North, while the spread of sharing economy initiatives in the Global South has escaped the purview of scholars. More so, the sustainability potentials claimed by proponents and actors in the field lack empirical investigation. This thesis aims to contribute to the discourse by assessing the state of the sharing economy in the Global South as represented by Metro Manila, and in relation to its ability to truly contribute to sustainability. In order to achieve this, the study utilises the sustainability pillars with the core framings tasks and sustainability transitions framework. Data collection methods included literature analysis, more than 25 in-depth interviews, and participant observation.

This study shows that the sustainability claims of the sharing economy in Metro Manila is somewhat similar to the Global North yet with key differences especially in terms of potential implications to sustainability. The expansion of the sharing economy across a wide range of economic sectors (i.e. transportation, services, money, spaces, logistics, food, goods and learning) is almost due to necessity; current prevalent regimes in the Global South fall short of providing basic needs and services such as efficient public transportation, employment opportunities and extra income. Hence, economic and social sustainability are the main diagnostic and motivational framings employed to attract users. Through strategic alignment of the sharing economy to urgent socio-economic problems while avoiding direct confrontation with incumbent industries, the sharing economy is able to grow with minimal resistance from prevailing regimes. However, because of the lack of environmental dimensions, the sharing economy is failing to actualise a holistic contribution to sustainability. Instead, at its current state, it is heading towards a more capitalistic pathway, fueling consumption, which will likely add to the growing urbanization problems of Metro Manila. This study stresses the need to better harness the potentials of the sharing economy before it runs counter to its promise to sustainability.

Keywords: sharing economy, Global South, Metro Manila, framing, sustainability transitions

Executive Summary

The sharing economy is a novel concept that is fluid and growing in scope and diversity. In this research, instead of defining the sharing economy, four emerging commonalities could be identified in the literature: (1) *Access over ownership*: It provides users temporary access to goods and services without the responsibilities attached to ownership; (2) *Maximising resource utilization*: Idle assets are optimised to its capacity and unwanted assets are minimised. This expands the coverage beyond goods to space and services (referring to time and skills); (3) *Distributed power*: Consumers are not simply passively buying but are actively engaging in the production, creation, financing and delivering of goods and services; and (4) *Digital platforms and Internet connectivity*: Technology and the Internet facilitate transactions and connections; platforms of exchange happen through online websites, mobile applications or a combination of both.

The sharing economy is postulated as a potentially disruptive solution to economic, social and environmental problems of cities. However, there is limited study substantiating the claim that the sharing economy could indeed be an alternative pathway to sustainability. Also, the vast majority of literature, researchers and scholars on the sharing economy originate from the Global North. Despite this, the diffusion of the sharing economy that is transferred and patterned from the North has reached the South at a rate that surpasses the academic studies performed, or lack thereof, to assess its relevance and compatibility with its new context. Without thorough investigation of this phenomenon, there is a risk that the opportunities to address sustainability challenges of the cities in the Global South could be overlooked and its benefit not leveraged to its full potential. The impetus for research is now greater as the shift in the demographics from the North to the South necessitates a recalibration of focus and attention as to how posited urban sustainability solutions such as the sharing economy could impact the South.

Hence, the objective of this thesis is to provide insights on the state and sustainability potentials of the sharing economy in the Global South as compared to the Global North. Two main questions that build on one another were investigated.

1. How do sharing economy platforms in Metro Manila compare to the Global North in terms of its sustainability claims?
2. How and in what direction is the sharing economy transitioning on its path to sustainability?

In order to answer the research questions, this thesis employed a variety of research methods. A *literature analysis* provided a foundation on the current global sharing economy discourse. From this, a selection criteria and typology were developed to *map* out the existing sharing economy platforms in Metro Manila. For each category and relevant government agency, where applicable, selected samples were requested for a semi-structured *interview*. Where possible and applicable, *participant observation* of sharing economy platforms was also performed to validate the veracity of and supplement the information from the interviews. For sharing economy initiatives actors that were not interviewed, *online sources* mainly from their website or news articles were taken into account.

All the data gathered were sorted out and analysed using two analytical frameworks: *sustainability pillars* supplemented with the *core framing tasks*, and the *sustainability transitions framework*. First, the sustainability claims were discussed using the three pillars of sustainability (i.e. economic, social and environmental) and compared with the claims from the Global North that was derived from the literature analysis. The core framings functions—diagnostic, prognostic and motivational framings—of the sharing economy platforms were used to

further deconstruct the sustainability claims. It is also used to elucidate *if* and *how* sharing economy platform developers position the sharing economy as a sustainable solution. Finally, the sustainability transitions framework was used to describe the pathway the sharing economy is progressing towards emerging as a sustainable alternative or not.

How do sharing economy platforms in Metro Manila compare to the Global North in terms of its sustainability claims?

In comparison to the Global North, the sharing economy in Metro Manila is still at its infancy, lacking diversity in sectorial representation and business model. Currently, there are sharing economy platforms in 8 sectors: transportation, services, goods, logistics, food and learning sectors, with the transportation sector having the most number of platforms and the learning sector the least. All of these platforms aim to help address problems that fail to satisfy the basic needs and services of Metro Manila citizens. This includes inefficient public transportation, unemployment, and expensive products and services. Furthermore, unlike in the Global North, all except one sharing economy platforms in Metro Manila require monetary payments while none are exclusively catering to luxury products and services.

Essentially, these sharing economy platforms entail the valuation of human services as opposed to the value of actual goods being shared; physical objects such as vehicles and food are simply conduits to which human services act upon. Hence, characteristically, human service is the center of almost all of the activities in the sharing economy in Metro Manila. At a time when the service industry is the highest contributor to the GDP of Metro Manila, the impact of this growth is unknown in terms of tax payments and labour conditions. On a conceptual level, this finding may call for a more refined selection of terminology. For example, for services, the terms "gig economy" or "on-demand economy" may be more appropriate than "sharing economy". By differentiating, it may better inform policy and management intervention. In line with the shift towards sharing of services as opposed to goods, there is also speculations that the sharing economy might be replaced by more automated services. This might have severe sustainability implications especially considering that more and more of the sharing economy platforms hinge on human services. Although this is more likely to happen in the Global North first, it would be advantageous for the Global South to take on preemptive measures. This is particularly important to Global South countries, like the Philippines, whose economy heavily relies on the service sector.

At its current state, the sharing economy in Metro Manila is incompatible with the principles of sustainability. The sustainability claims are primarily linked to economic and social sustainability as opposed to a holistic and balanced contribution to the three pillars of sustainability. The environmental sustainability dimension is almost irrelevant; the sharing economy platforms subscribe to environmental sustainability at a lesser extent than platforms from the Global North.

Similar to the Global North, economic and social sustainability are the main diagnostic and motivational framings that the sharing economy platforms in the Global South employ to attract users. The persuasive power primarily stems from the need to satisfy basic needs such as efficient public transportation, employment and extra income, which current regimes in the Global South fall short to provide and the need for cheaper alternatives than existing options. By linking the sharing economy to urgent socio-economic problems and providing more efficient solutions, it is easily mobilising the support of people. The strong economic and social positioning, from diagnostic, prognostic and motivational framings, trumps the environmental sustainability dimension that the sharing economy could offer. The environmental dimensions are not inexistent; many platform developers are aware of the

positive externality of the sharing economy to the environment. However, platform developers recognise that the environmental angles do not appeal users. Hence, it appears as if there is mutual exclusivity where high social and/or environmental ethoses have low user participation (and have ceased operations) while those with strong economic positioning and weak social and/or environmental advocacies have high user participation.

How and in what direction is the sharing economy transitioning on its path to sustainability?

The sharing economy in Metro Manila is positioned as a complementary or alternative to existing services, not as a substitute. Further, most platforms target specific and underserved markets that enable the sharing economy to enjoy a passive shield, effectively avoiding the direct scrutiny and the immediate opposition from incumbent industries. The sharing economy benefit from this protective space as it further develops its own products and services. This continuous act of innovation is innately part of the design of these sharing economy platforms, particularly through the rating and reputation system. Sharing economy platforms also partner with broad and diverse regime actors. However, while all these would have been generally viewed as good from the business perspective, both these shielding and nurturing processes are not directed towards replacing the currently unsustainable standards. Hence, the sharing economy is utilising fit and conform empowerment strategies that makes it more susceptible to adhering to conventional standards that are not likely to be characterised by sustainability.

Direct resistance by existing industries to sharing economy initiatives is currently unheard of except for the transportation sector. On the other hand, it is likely that the Philippine government will be more supportive of the sharing economy given that it fuels creativity and economic activity, and pushes industries to deliver better and more efficient services. Also its association to the "innovations economy" makes it more appealing to investors and policy makers.

Poised by some in the Global North as an alternative pathway to sustainability, the strong economic and social positioning but poor environmental sustainability positioning of the sharing economy in Metro Manila are strengthening neoliberal capitalism and consumption. The sharing economy is, therefore, no different from existing industries in terms of its current lack of ability and desire to change systems into more sustainable ones. If this trend continues, it is likely that the sharing economy will fail to become an alternative pathway to sustainability.

This research contributes to the sharing economy discourse and sustainability transitions literature. First, this is the first comprehensive academic study on the state of the sharing economy in the Global South, as represented by Metro Manila. The implications of the findings and analysis are significant especially in light of the continually growing population and urbanization in many of the Global South cities. For one, if the sharing economy heavily relies on actual human services, this would then require developing social safeguards to protect both ends of the users. Also, if the services sector is currently the main contributor to the economic growth of Metro Manila, the sharing economy may either positively or negatively disrupt the development of the region. Hence, there is a greater impetus to shift the direction of the sharing economy in the Global South towards a holistic approach to sustainability given its tendencies to further reinforce neoliberal capitalism and consumption. Otherwise, it will only be contributing to the current unsustainable lifestyle in cities.

Second, to the author's knowledge, this thesis is among few studies that apply the sustainability transitions framework to soft infrastructures, in this case the sharing economy. Normally the sustainability transitions framework is used for renewable energy technologies.

Additionally, this research builds on the work of Geels (2014) on resisting forces against niches. While resistance in Geels' research primarily occurs from external forces, using Benford & Snow's (2000) notion of contested processes shows that resistance that inhibits the growth of the niche also happens within and between niche players as well. Furthermore, using the concept of resisting forces, this thesis stresses the need to not only focus on internal developments in improving sustainability and resisting regimes but must also be simultaneously active in destabilising the existing regime.

Third, this research also highlights the importance of using appropriate categorizations in order to properly nuance the sustainability claims. This thesis utilised Owyang's Honeycomb 2.0 and in doing so, it was able to illustrate that sustainability potentials are contingent on the sector it belongs to. Other catergorizations can be used but establishing the parameters of the assumptions and parameters must be transparent. Clearly, using one or a few sharing economy platforms as basis for generalising the findings for the entire sharing economy is flawed and problematic.

There are a number of research areas that this thesis opens up. For a concept as fluid as the sharing economy, assessment studies are only as good its ability to be relevant, sensitive and adapt to this evolving movement. Certainly, at its current state and in terms of its short-term trajectory, the sharing economy in the Global South is not sustainable. However, the sharing economy is not a lost cause yet. Through the frameworks used, it was able to reveal the gaps and flaws that could allow future researches to recommend on how this bleak trajectory could be averted.

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1   Introduction

The year 2015 was a celebration for sustainability with the adoption of the *Sustainable Development Goals* and the *Paris Agreement*. It was a reaffirmation of a movement that does not waver despite several lows in the past decades. There are promising indications that proposals and attempts to provide solutions towards achieving this will persist. Whereas sustainability-centric actions were traditionally siloed, top-down, and had limited impact, innovative solutions that involve systemic changes, diverse actors and holistic approaches have had greater appeal, though proving to be of equal challenge in their implementation. Sustainability, anchored on its three pillars (i.e. economic, social and environmental) is evidently surpassing being just a buzzword to become a real cause for action.

Among the growing concerns that challenges the society is managing the urban areas. John Wilmonth, Director of UN Department of Economic and Social Affairs Population Division, said, "Our success or failure in building sustainable cities will be a major factor in the success of the post-2015 UN development agenda". Yet the challenge is more pressing in developing nations or the Global South where, of the current 28 mega-cities, 23 are in Asia, Africa and Latin America. On top of this, Asia and Africa are said to be urbanising faster than other regions (UN, 2014). By 2050, it is projected that both regions will be home to additional 2.3 billion people residing in urban areas of the estimated 2.5 billion increase worldwide (UN, 2014). Adding to this surmounting challenge of population growth is the lack of capacity in cities of the South to appropriately respond to urbanization-related problems as constrained by, *inter alia*, technical and financial resources.

Nonetheless, at a given threshold, as population increases, it carries with it the possibility of economic development; human resources contribute to economic activity either as producers or consumers. As a double-edged sword, however, population and economic growth also come with the challenge of managing resources and waste. For instance, anthropogenic greenhouse gas (GHG) emissions emanating from cities are responsible for at least 40% to as much as 70% of the total GHG atmospheric concentrations, mainly due to the burning of fossil fuels (UN-HABITAT, 2011). Hence, economic development needs to be decoupled from natural resource consumption and environmental preservation while addressing social issues such as a poverty, social segregation, unemployment and safety.

Against this backdrop, the city is transformed to a playground and battlefield where stakeholders are actively experimenting on appropriate responses. Clearly, however, there is no silver bullet solution applicable to all cities. Cities continue to explore options; among the latest trends include living laboratories (Evans & Karvonen, 2011; Veeckman & van der Graaf, 2015) and smart cities (Caragliu, Bo, & Nijkamp, 2011; Chourabi et al., 2012). Nonetheless, city governments are not alone in this quest of finding solutions to urban problems; all stakeholders, from citizen groups, non-governmental organisations, educational institutions, scientific communities to corporate companies, are called to action (WCED, 1987).

The sharing economy, which this research investigates, is viewed as a potentially disruptive solution to economic, social and environmental problems of cities (Heinrichs, 2013). Agyeman, McLaren, & Schaefer-Borrego (2013) posit, "Building a sharing infrastructure and culture is quite simply one of the most important things cities can do to contribute to a fair and sustainable world." However, activities and business models that merit inclusion in this sharing economy phenomenon are diverse and also contentious. To date, as a relatively novel concept, there is a lack of agreed definition. In addition, it can also be called as *collaborative economy*, *collaborative consumption*, *on-demand economy, gig economy* and other related terms that

sometimes hinder the development of a common definition. In general, this can broadly refer to transactions that range from renting and lending, to reselling, swapping and donating of assets, resources and services amongst peers and businesses. *Uber, Airbnb, Coursera, TaskRabbit* and *Kickstarter* are among the most popularly known sharing economy platforms. As suggested by these examples, the sharing economy stretches to various sectors, from mobility, accommodation, learning, personal services to financial support and others, and covers a broad range of actors from private to public sectors. A more thorough discussion on the sharing economy discourse is found in Chapter 2.

Cities around the world are increasingly acknowledging the viability of the sharing economy phenomenon as a solution to urban problems. In 2013, 15 cities in the United States adopted a resolution pledging and encouraging support to the sharing economy (US Conference of Mayors, 2013). This took cue from the San Francisco Sharing Economy Working Group established in 2012 that is mandated to comprehensively examine the economic benefits of this phenomenon and suggest appropriate policy measures to capture these benefits and protect customers (City & County of San Francisco, 2012). In Europe, the European Commission for Economic Policy has shown receptiveness to the sharing economy and considers it as a paradigm changer (EU Committee of the Regions, 2015). On a firmer stance, the United Kingdom government is committed to make the sharing economy flourish, declaring that "We want Britain to lead the way on the sharing economy…[and make] UK the sharing economy's natural home", citing Leeds City Region and Greater Manchester as the pilot sites and models for the other cities in the UK (UK Department of Business, Innovation and Skills, 2015). Nonetheless, all these are not without caveat; each highlighted the ability of the sharing economy to contribute to economic, social and/or environmental goals, yet recognised the need for a thorough study of its impacts, and called for regulation.

1.1 Problem Definition

The vast majority of literature, researchers and scholars on the sharing economy originate from the Global North (c.f. Cohen & Kietzmann, 2014; Cohen & Sundararajan, 2015; Ertz, Durif, François-Lecompte, & Boivin, 2016; Heinrichs, 2013; Martin & Shaheen, 2011; Möhlmann, 2015; Parguel, Lunardo, & Benoit-Moreauc, 2016; Schor, 2014). As such, it is likely that the conceptualisation of the definitions and practices is devoid of diverse input from different landscapes, particularly from the Global South. Despite this, the diffusion of the sharing economy that is transferred and patterned from the North has reached the South at a rate that surpasses the academic studies performed, or lack thereof, to assess its relevance and compatibility with its new context. Furthermore, despite the promising sustainability potentials of the sharing economy discussed in literature (see Chapter 2), limited academic research has been done to systematically assess if it could effectively substantiate these claims against the challenge of competing with prevailing business, structures and behaviors. Without thorough investigation of this phenomenon, there is a risk that the opportunities to address sustainability challenges of the cities in the Global South could be overlooked and its benefit not leveraged to its full potential. Presumably, given the socio-economic, demographical and cultural differences, the transition pathways of the sharing economy in the Global South could be different from that in the Global North; this calls for an investigation that would map out the potential pathways of the sharing economy. The impetus for research is now greater as the shift in the demographics from the North to the South necessitates a recalibration of focus and attention as to how posited urban sustainability solutions such as the sharing economy could impact the South. (See Chapter 4 on the Rationalisation of the Research for further details on the problem definition.)

1.2 Objective and Research Questions

Taking into account the context and problems presented above, the objective of this thesis is to provide insights on the state and sustainability claims of the sharing economy in the Global South as compared to the Global North. First, this research maps out and examines the existing sharing economy initiatives in the Global South using Metro Manila as a case study. Then it investigates the validity of the assumption that the sharing economy could be an alternative pathway to sustainability by (a) analysing the sharing economy's sustainability claims and how actors frame it; and (b) investigating the possible trajectory the sharing economy is heading towards. To answer this, two main questions that build on one another are probed. This resulted to the development of four complementing outputs.

Research question	Analytical framework	Output
Research Question #1: How do sharing economy platforms in Metro Manila compare to the Global North in terms of its sustainability claims?	Sustainability Pillars Core framing tasks	Sharing economy map (i.e. classified list of examples)
1.1. How do various sharing economy platforms contribute towards economic, social and environmental sustainability?		Comparative summary of sustainability claims
1.2. How do various sharing economy platforms, individually and collectively, frame and position the sharing economy vis-à-vis the three pillars of sustainability?		Summary of sharing economy platform core framings
Research Question #2: How and in what direction is the sharing economy transitioning on its path to sustainability?	Sustainability transitions framework	Sustainability transitions pathways
2.1. How are the sharing economy niches shielded, nurtured and empowered? How do regimes resist the sharing economy?		
2.2. What is the current and possible trajectory of the sharing economy in relation to its contribution to sustainability?		

Ultimately, by answering these questions, this research can highlight the gaps and flaws of the sharing economy. It does not aim to recommend or provide suggestion through which actors can shape the direction or trajectory of the sharing economy or its transition. Instead, the prime focus of this research is to provide a preliminary assessment as to the claims of the sustainability potentials of the sharing economy and how actors in the Metro Manila appear to frame the potentials in the first place.

1.3 Brief Overview of Research Design

In order to answer the research questions, this thesis employed a variety of research methods. A *literature analysis* provided a foundation on the current global sharing economy discourse. From this, a selection criteria and typology were developed to *map* out the existing sharing

economy platforms in Metro Manila. For each category and relevant government agency, where applicable, selected samples were requested for a semi-structured *interview*. Where possible and applicable, *participant observation* of sharing economy platforms was also performed to validate the veracity of and supplement the information from the interviews. For sharing economy initiatives actors that were not interviewed, *online sources* mainly from their website or news articles were taken into account.

All the data gathered were sorted out and analysed using two analytical frameworks: *sustainability pillars* supplemented with the *core framing tasks*, and the *sustainability transitions framework*. First, the sustainability claims were discussed using the three pillars of sustainability (i.e. economic, social and environmental) and compared with the claims from the Global North that was derived from the literature analysis. The core framings functions—diagnostic, prognostic and motivational framings—of the sharing economy platforms were used to further deconstruct the sustainability claims. It was also used to elucidate *if* and *how* sharing economy platform developers position the sharing economy as a sustainable solution Finally, the sustainability transitions framework was used to describe the pathway the sharing economy is progressing, if it is emerging as a sustainable alternative or not.

Chapter 5, with Figure 2 for the schematic diagram of the research design, contains an in-depth discussion on the methodology.

1.4 Scope and Limitations

Definition of the sharing economy: There is no agreed definition of the sharing economy; it varies according to the discipline of the researcher or practitioner. Similarly, the diversity in typologies identified is a reflection of the richness in the business models. Defining and classifying is a research in itself, and thus beyond the scope of this thesis. Hence, this research will not aim to capture this complexity by patronizing an existing definition or developing a new definition. Rather, it articulates the common characteristics observed in many of the definitions. Furthermore, due to its several overlaps with other similar terms (e.g. collaborative consumption, peer economy, etc.), papers written under these topics will also be explored, where relevant. For a more detailed discussion, see Chapter 2.

Selection of case study: As presented in Chapter 4, the Philippines, being part of Asia-Pacific that ranked high in terms of willingness to participate in the sharing economy, is a suitable candidate for investigating sustainability pathways. Metro Manila, composed of 16 cities and a municipality, is the seat of government power and most populous among all the regions in the Philippines. Because of the mobility in terms of people movement and business transactions, and the congruence of city policies, these cities and municipality are heavily connected and cannot be taken individually or separately. Hence, it will be studied as a whole region. As opposed to other Global South countries, such as China, India, Indonesia and Latin America, language and cultural barrier would have restricted the extent of the author's ability to gather and analyse data given the limited time. Further information on the scope of the case study is discussed in the selection criteria developed for this thesis found in Chapter 5.

Completeness of empirical data: The site visit in Metro Manila was conducted between 26 March to 22 April 2016, with one Skype conversation in 5 May 2016. While prior work of arranging meetings was mostly done in Lund, Sweden, the time difference and lack of physical presence limited the confirmation of meetings. Nonetheless, the informants interviewed in this study were key players of the sharing economy in Metro Manila given their current popularity and user base.

Furthermore, since this thesis employs the sustainability transitions framework with a focus on the niche (discussed in Chapter 3), particular emphasis was given to sharing economy platform developers. Government actors and existing industries are also important players but are only secondary in priority; thus, the main source of data for these players was online sources. Attempts to interview them were made but data collection coincided with the height of the national election campaign period. This particularly constrained meetings with government agencies as they prepared for turnover to the succeeding officers. In line with this, as it will be discussed in Chapter 5, the so far lack of or minimal opposition from the government and existing industries automatically limits the scope to assessing sustainability potentials, as opposed to covering sustainability challenges as well.

1.5 Targeted Audience

This thesis is part of the fulfilment of a Master's degree in Environmental Sciences, Policy and Management hosted by Lund University and in partnership with the Central European University and University of Manchester. It is primarily aimed at academics and researchers working on the sharing economy and sustainability issues, from both the Global North and the Global South. Also, because the main informants of this research are sharing economy platform developers and entrepreneurs, the language used to discuss sustainability has been chosen in such a way that it is readily comprehensible. Furthermore, this is also written as simple as possible since the implications of the findings of this paper are also relevant to policymakers and local governments, particularly from Metro Manila.

1.6 Disposition

From here, Chapter 2 kicks off this thesis with a presentation of the sharing economy discourse, including definitions and classifications. It also discusses a comprehensive summary of the sustainability claims and challenges of the sharing economy in the Global North.

Chapter 3 describes the analytical frameworks used for data analysis. Chapter 4 builds on the two preceding chapters by identifying the research gaps and arguing for the relevance of this research. Chapter 5 presents a detailed description of the methodology. Chapters 3 to 5 are key to understanding the design and purpose of this research.

Chapter 6 presents the results of the data collected. Chapter 7 and Chapter 8 then use the sustainability pillars with the core framing tasks, and the sustainability transitions framework, respectively, to analyse the results.

Chapter 9 presents the discussion, including future research areas. Finally, Chapter 10 provides the main conclusions of the analysis and explains the contribution of this research to the sharing economy and sustainability transitions literature.

2 Literature Analysis

This Chapter presents a background on the sharing economy. It highlights the novelty of the concept and the on-going debates on distinguishing the sharing economy with related concepts, developing a definition and proposing approaches to classification. The last section is a comprehensive review and analysis of the popularly cited sustainability claims and challenges of the sharing economy.

2.1 The Sharing Economy Term

Before defining the sharing economy, it is worth acknowledging that various related terminologies exist. Terms and concepts similar to the sharing economy are *collaborative economy*, *collaborative consumption*, *access economy*, *peer economy*, *gig economy*, *on-demand economy, gift economy*, *rental economy* and *the mesh*. Many of these terms are also new, do not have fixed definitions, and have significant overlaps with one another.

The debate, however, is not so much on identifying the most suitable term than describing the phenomenon. Hence, at the moment, there is no consensus or agreement over the terminology. This could be attributed to the novelty of the sharing economy as an academic field, the diversity in research focus, discipline of the researcher, or the interest of the practitioner. Heinrichs (2013) and Acquier (2016) propose that the sharing economy could take on a more encompassing role, serving as an umbrella concept that could help "understand and guide new inventions and in the institutionalisation of new economic practices, roles and interactions of societal actors". The danger, however, in doing so is what Schor (2014) calls "sharewashing", which could pose a problem when studying public perception of the sharing economy due to the broadness and diversity of its scope.

This thesis employs the most popularly used and searched term—the sharing economy. An advanced search in the *Web of Science* and *Google Trends* both reveal that the "sharing economy" has garnered the most interest among all those previously cited similar terms in written academic and scholarly studies as well as searches done in Google. Martin (2016) also justified using the term sharing economy in his research by employing statistics from the *LexisNexis* database of newspaper articles.

2.2 Defining the Sharing Economy

Unpacking the term "sharing economy" would entail employing perspectives from various disciplines in order to provide an accurate description of this phenomenon. For instance, "sharing" could be viewed from cultural and sociological perspectives that look into the history of why humans have evolved into sharing (Agyeman et al., 2013; Belk, 2014). On the other hand, "economy" would require an economics perspective that looks at human as *homo economicus* or one that tackles business models, for example. Here, the focus could be on the process, transaction or exchange that transpire within the sharing economy (Allen & Berg, 2014; Henten & Windekilde, 2016).

As singular term, however, defining the sharing economy is a challenge in as much as it is a nascent field of study. Academics have not attempted to define the sharing economy in absolute, precise terms (Schor & Fitzmaurice, 2015). Practitioners have loosely described it according to existing practices to ensure that it includes all varieties, while excluding as few as possible. In fact, after three years of study, Schor (2014) concludes by saying that "Coming up with a solid definition of the sharing economy that reflects common usage is nearly impossible. There is great diversity among activities as well as baffling boundaries drawn by

participants." As such, this thesis veers away from selecting one definition and instead lists several commonly used descriptions (Table 1).

Table 1. Various definitions of the sharing economy

Reference	Definition	Context/Notes
Belk, 2014	"…people coordinating the acquisition and distribution of a resource for a fee or other compensation."	Used the term "collaborative consumption"
Botsman, 2015	"Systems that facilitate the sharing of underused assets or services, for free or for a fee, directly between individuals or organizations."	Attempted to differentiate other related terms
Cooper & Timmer, 2015	"…a spectrum of actors (non-profit to social enterprise to for-profit) that identify with Sharing Economy beliefs and traits and buy, sell, rent, loan, borrow, trade, swap and barter a broad range of tangible and intangible assets including goods, time, and space. Information technologies and web platforms support necessary trust and reciprocity, and dramatically lower transaction costs."	Definition made to be relevant to local governments
DuPuis & Rainwater, 2014	"…businesses that provide consumers the ability and platform to share resources and services from housing to vehicles and more, typically taking place with an online and/or application- based business model."	Definition made to be relevant for public policy; study conducted for the National League of Cities (US)
Stephany, 2015 (as cited in Richardson, 2015)	"Sharing economy is constituted by 'the value in taking under-utilised assets and making them accessible online to a community, leading to a reduced need for ownership.'"	Developed from a business narrative of sharing
Wosskow, 2014	"…online platforms that help people share access to assets, resources, time and skills."	A report commissioned by the UK government; a policy-oriented perspective

As an alternative way of describing the sharing economy, Frenken, Meelen, Arets, & Glind (2015) used a relational method by connecting it to other economic activities. First, they cite that sharing must occur between consumers and not between business-to-consumer, otherwise it is a product-service economy. Second, sharing involves temporary access and not complete transfer of ownership, otherwise it is a second-hand economy. And third, it refers to sharing of physical assets only, whereas the inclusion of human services makes an on-demand economy.

The number of proposed categories developed to characterise the sharing economy is equally diverse depending on the unit of analysis. Table 2 presents the typologies proposed by different researchers and practitioners. Each of these has both advantages and limitations. Classifications dependent on the production and consumption are biased towards goods, excluding or undermining the uniqueness of the service industry. Business models typically focus on investigating the value creation structure and processes of more or less well-established sharing economy practices. Categorisation according to actors heavily focuses on proponents and undermines the collaborative nature of the sharing economy. On the other

hand, grouping based on sectors provides a straightforward method that distinctly delineates initiatives, but runs the risk of overlooking common features or overlaps across sectors.

Table 2. Typologies used in literatures sources about the sharing economy

Unit of analysis	Reference	Categories
Production and consumption; type of ownership or access	Botsman & Rogers, 2011	Product service systems Redistribution markets Collaborative lifestyles
	B. Cohen & Muñoz, 2015	Consumption vs. Production and Public interest vs. Private interest
	M. J. Cohen, forthcoming	Ownership motivation vs. Ownership type
	Demailly & Novel, 2014	Redistribution (reselling, giving and swapping) Mutualisation (renting and short-term lending) Mobility
	Schor, 2014	Recirculation of goods Increased utilisation of durable assets Exchange of services Sharing of productive assets
	Hamari, Sjöklint, & Ukkonen, 2015	Access over ownership (i.e. renting, lending) Transfer of ownership (i.e. swapping, donating, purchasing used goods)
Business models	B. Cohen & Muñoz, 2016	Crowd based technology Collaborative consumption Business to crowd True share outlier
Actors	Cooper & Timmer, 2015	For-profit Social enterprise/cooperative Non-profit Community Public sector
	Schor, 2014	Peer-to-peer (P2P) Business-to-peer (B2P) Government-to-peer (G2P)
Sector	Martin, Upham, & Budd, 2015	Accommodation sharing platforms Car and ride sharing platforms Peer-to-peer employment markets Peer-to-peer platforms for sharing and circulating resources
	Agyeman et al., 2013	Material Product Service Wellbeing Capability
	Owyang, 2014	Health and wellness Logistics

Money
Goods
Food
Service
Transportation
Space
Money
Municipal
Corporate
Learning
Utilities

Another important development in the growing scope of the sharing is that conventional service providers are slowly expanding their business portfolios to incorporate sharing services (Cusumano, 2014; Marchi & Parekh, 2015). Möhlmann (2015) gave three examples: *Urban Outfitters*, an American apparel brand, has a yard sale or flea market in its retail shops; the car rental company *Avis Group* bought *Zipcar*, a car sharing company; and *Hornbach Group*, a home improvement supply store, now lends tools like pressure washers and garden waste shredders. Furthermore, while many of the popular examples are between peer-to-peer and business-to-peer, Heinrichs (2013) proposes that the sharing economy also encompasses transactions involving business-to-business and between civil society actors and government entities.

To summarise, instead of looking at the semantics and classifications, four emerging commonalities could be identified in the literature:

1. *Access over ownership*: It provides users temporary access to goods and services without the responsibilities attached to ownership. Nonetheless, this could also include transfer of ownership of used or second-hand goods. Hence, activities can range from renting and lending to reselling, swapping and donating. This also implies that transactions could involve monetary and non-monetary forms, or tangible and intangible units (e.g. time, reward points).

2. *Maximising resource utilization*: Idle assets are optimised to its capacity and unwanted assets are minimised. This expands the coverage beyond goods to space and services (commonly referring to time and skills).

3. *Distributed power*: Consumers are not simply passively buying but are actively engaging in the production, creation, financing and/or delivering of goods and services. It redefines traditional business-to-consumer (B2C) transactions by enabling peer-to-peer transactions. This also reflects that although some of the sharing economy platforms are privately owned, the development heavily depends on the social dynamics that transpires within the platform such as self-marketing, reputational ratings and others (Hamari et al., 2015).

4. *Digital platforms and Internet connectivity*: Technology and the Internet facilitate transactions and connections; platforms of exchange happen through online websites, mobile applications or a combination of both. Thus, activities conducted purely offline, like traditional flea markets, do not qualify as part of the sharing economy. Similarly, grassroots and community-bounded initiatives are excluded if it is not mediated digitally.

The variety of definitions and typologies is not necessarily contradictory to each other but a sign of the evolving nature of the sharing economy field that seeks to capture this highly elusive concept (Daunorienė, Drakšaitė, Snieška, & Valodkienė, 2015). Richardson (2015) invites all to look at the sharing economy as "a series of performances rather than a coherent set of economic practices…[that] construct diverse economic activities whilst also inviting the deconstruction of ongoing practices of dominance." This dynamic and pluralistic understanding of what the sharing economy is or could be, is a probable reflection of the dissatisfaction towards current regimes and is an attempt to course a change towards a different system. The debate does not only reside in what the sharing economy is; the next section looks at another contentious issue surrounding the sharing economy—its sustainability potentials.

2.3 Sustainability Claims and Challenges

The landmark report *Our Common Future* placed sustainable development at the forefront of the world's agenda, claiming that the pursuit towards environmental and economic development are interdependent (WCED, 1987). It strongly advocated that true development must consider not only economic issues but also social and environmental issues. This widely recognised document promoting the inclusion of the three pillars of sustainability as a holistic approach for practices and policies went beyond calling out government for action but to all citizen groups, non-governmental organisations, educational institutions, scientific communities as well as corporate companies.

The sharing economy is argued by some as a potentially new pathway to sustainability (M. J. Cohen, forthcoming; Demailly & Novel, 2014; Heinrichs, 2013; Prothero et al., 2011). It has emerged as a response to the hyper-consumerist society in light of the global economic recession and increasing environmental consciousness, and accelerated by the advancing information and communications technology (Allen & Berg, 2014; B. Cohen & Kietzmann, 2014; B. Cohen & Muñoz, 2015; Cooper & Timmer, 2015; Hamari et al., 2015; C. J. Martin, 2016; Möhlmann, 2015; J. Schor, 2014). Yet this very proposition were met with scepticism and criticism, to the extent that some have even called it "neoliberalism on steroids" (Morozov, 2013) and "a nice way for rapacious capitalists to monetise the desperation of people in the post-crisis economy while sounding generous, and to evoke a fantasy of community in an atomized population" (Henwood, 2015). As such, with these diverging views, it could also be seen as a midpoint of the spectrum that challenges the unsustainable, capitalistic and consumerist world paradigm; the intermediary of simply repairing an existing system and radically changing the system itself (Heinrichs, 2013). Alternatively, these dichotomous claims are likely due to the evolution of the phenomenon: conceived to serve as alternative to the conventional living and a return to the old norm, while in practice advancing towards a more business-oriented paradigm. This section provides an overview of the sustainability debate confronting the sharing economy from the business, user, and government perspectives. It does not aim to be exhaustive but sufficient enough to cover the main arguments. The structure is in line with three pillars of sustainability: economic, social and environmental.

2.3.1 Economic Dimension

Munger (2016) calls the sharing economy *Tomorrow 3.0*, following the Neolithic and Industrial Revolutions. He claims that regardless of whether this will be good for the world economy or not, it will happen because "the economic logic is inescapable." This revolution is unfolding in a distinct way; in the midst of a nation's economic crisis and a consumer's financial constraint, the sharing economy can propel continuous economic activity and become an alternative source of income, be it additional or sole-source, as seen in Barcelona and Madrid (Ekelund &

Bradley, 2015). The offerings of this disruptive innovation are usually at no or low cost relative to conventional products and services due to the lower transaction cost and decentralised nature of the business models (Allen & Berg, 2014; Munger, 2016). Exchanges transpire more in the market as opposed to the strong-hold facilitative control of the firm because of the improved efficiencies; at the marketplace and in the absence of the firm, resource owners and consumer's needs and wants are easily matched at the right time, given reasonable transaction cost (Allen & Berg, 2014). Furthermore, some of the sharing economy platforms such as *Uber* and *Airbnb* employ dynamic pricing whereby price is sensitive to current supply and demand level. By doing so, greater efficiency in the exchange is guaranteed (Allen & Berg, 2014). Thus, it is not surprising that rational thinking and self-interest manifested in the reasons of affordability and cost savings are the prime motivations why many participate in these platforms (Möhlmann, 2015).

At the macroeconomic level, while this may result in degrowth due the possible closure of some businesses, less production and less consumption, some researchers claim that the effects are irrelevant up to a certain extent as it creates other economic opportunities (Demailly & Novel, 2014; Fang, Ye, & Law, 2015). Take for example the employment sector. From the perspective of jobs, the sharing economy can counterbalance the risk of layoff in conventional companies with the possibility of generating new and additional opportunities for people to earn money (Demailly & Novel, 2014). The sharing economy is also said to be fuelling microentrepreneurs wherein people are able to maximise their existing assets and resources (Wosskow, 2014). In line with this, there are several testimonies from platform users attesting that through the sharing economy, they have a supplementary source of income and for some have become their sole-source of income (Clawson, 2015; PBS NewsHour, 2014; Thompson, 2015; Troncoso, 2014). Nonetheless, others have cautioned of the possible repercussions on the quality of the products or services being offered and the level of income (and lack of social benefits) that may incite a "race to the bottom" (Dartagnan, 2015; J. Schor, 2014; Troncoso, 2014).

Two other major critiques on the sharing economy are about the ways it escapes national economic accounting and how it creates unfair competition. As a new economic activity, its contributions are not directly incorporated into the calculation of Gross Domestic Product and those who profit from it might do so improperly, as they do not declare this income as part of their earnings (Demailly & Novel, 2014). This, including a push from existing industries that are threatened by the sharing economy, has caused regulatory and legal battles in several cities (Finck & Ranchordás, 2016; Frenken, 2016; Frenken et al., 2015). Yet the threat on these businesses and platforms is different for grassroots innovations and self-organised sharing initiatives. The initiatives that are initially designed to be non-profit are forced to emerge as commercial activities over time due to coercive and indirect pressures from existing industries (Martin et al., 2015). Many are also challenged to scale up and/or scale out and run the risk of corporate take-over or corporatization (Celata, Ribera-Fumaz, Hendrickson, & Sanna, 2015). Furthermore, within the sharing economy, platforms that are owned by shareholder corporations and funded by significant venture capital drive have better leverage than the truly grassroot startups (M. Cohen & Sundararajan, 2015). Unfair competition also arises when sellers and buyers prefer to use the dominant platform with the greatest number of participants, thereby preventing similar platforms from getting a critical mass of users (Demailly & Novel, 2014).

2.3.2 Social Dimension

Sharing historically started within the confines of personal networks of family and close friends but the sharing economy helped it to progress towards sharing among strangers at scale through technology (Schor, 2014). Central to what drives users to continue participating

in sharing economy platforms are trust and the sense of belongingness to a community (Decrop & Graul, 2016; Möhlmann, 2015) which is enhanced by the rating and reputation systems in place. Interestingly, however, people from disadvantaged communities, though aware of the sharing economy, are more cautious in participating in these platforms due to trust issues (Dillahunt & Malone, 2015).

Through the sharing economy, particularly in the transportation sector, people from the lower class who did not have access to resources before can now access them (Fraiberger & Sundararajan, 2015; Kodransky & Lewenstein, 2014). This democratization of products and services makes the sharing economy more inclusive and accessible to all (Gansky, 2010). Others claim, however, that most of those who participate and benefit from the sharing economy are affluent young people aged 18 to 34 (Chiang, 2015).

Yet Schor's (2014) empirical observations also revealed that social connections have declined (i.e. became more causal and less durable). Crowdsourcing of information, for example, ran opposite to what it was intended to achieve; people have formed weak social bonds due to the increased reputational information. Furthermore, she has also observed increased social discrimination in the form of class, gender and racial disputes. In another study, Schor, Fitzmaurice, Carfagna, & Attwood-Charles (2015) argue that egalitarian circuits or business models whose success is defined by robust trading activity *and* adherence to organisational mission of open access and equality of participation encounter mutual exclusivity; it is difficult to attain both goals at the same time. Those that have high trading activity cannot maintain equality, inclusivity, and access to all users. Accordingly, those that remain adherent to their sharing ethos have failed to sustain a good deal of trading activity and robust participation. Nonetheless, the sharing economy is said to promote higher equity since economic rents do not go to rent extractors but to the actual service provider (Schor, 2014).

B. Cohen & Kietzmann (2014) also argue that the sharing economy created a hybrid version of the sustainable consumption-production spectrum whereby it blurs the line that distinguishes one from another. In this hybrid area, people are brought together by the sharing economy to co-design, co-finance, co-produce, co-distribute and consume collectively or individually. They claim that it is through this that it can disrupt existing industries and transform them into more sustainable ways of functioning. Admittedly however, B. Cohen & Kietzmann (2014) recognise that their research was optimistic to the sustainability potential of the sharing economy and that the next step would be to quantify the social, economic and ecological impacts of the sharing economy; they argue that if the current impacts have not yet been determined, more so can anyone properly speculate on its future directions.

2.3.3 Environmental Dimension

The basic premise of claiming the environmental sustainability potential of the sharing economy rests on the optimisation of idle and underutilized assets (Novel, 2014). As resources are utilized to their maximum technical capacity while still providing quality service, the assumption is that less new resources are extracted and produced, while simultaneously resulting in less waste generated; overall, these would translate to a lower carbon footprint (Demailly & Novel, 2014). Furthermore, from a business perspective, the sharing economy aligns eco-efficiency with business efficiency where excess capacity is decreased as utilization rate increases (Allen & Berg, 2014). However, a counterargument with this line of thinking is that life cycle analysis warns that the use-phase has the highest environmental impact; hence, extending a products' life may hinder the replacement of more efficient ones.

The sharing economy could be seen as a way to promote "ecological citizenship" that challenges prevailing industries to adopt more environmentally sound practices (Bradley &

Hult, 2015). Interestingly, although a majority of users perceive that the sharing economy is better for the environment (PwC, 2015), in a study by Möhlmann (2015), he discovered that the primary motivation for continued engagement is the personal satisfaction derived from utility, cost savings, familiarity, service quality, trust and community belongingness. Environmental impact had no influence in determining the retention and loyalty of customers. Likewise, the research of Hamari et al. (2015) reveals that while environmental sustainability is among the motivational factors for participation in the sharing economy, there exists an attitude-behaviour gap where good intentions do not necessarily translate into action. From the business side, the survey conducted by Wagner, Kuhndt, Lagomarsino, & Mattar (2015) similarly uncovers that the environment is among the least concerns in terms of creating the value proposition and identifying the perceived market of the sharing economy. Also, while many of these sharing economy initiatives claim to create positive environmental impact, very few have done environmental impact assessments (c.f. Airbnb, 2014; Firnkorn & Müller, 2011; E. Martin & Shaheen, 2011). One of the few known studies conducted was made by *Blocket.se* that measured that it averted 1.6 million GHG from the sales of second-hand goods (Blocket.se, 2013).

A critical concern with regard to the environmental impact of the sharing economy is the potential rebound effect (Lahti & Selosmaa, 2013). As Demailly & Novel (2014) speculate, while the economic and social rebound effects could be positive due to the increased economic activity and social connections, it is likely that the environmental rebound effects are negative. To illustrate this risk, Parguel, Lunardo, & Benoit-Moreauc (2016) found that environmentally conscious consumers of second-hand P2P platforms have more tendency to buy impulsively than regular consumers. This is because engaging in good activities, in this case second-hand platforms, gives them the "license" to give in to more buying. Furthermore, Schor & Fitzmaurice (2015) speculate that the sharing economy fuels consumption to those who previously could not afford those products and services.

Table 3 presents the summary of the commonly discussed economic, social and environmental claims and challenges of the sharing economy. This will later on be used as basis for comparison with the sustainability claims of the Global South in Chapter 7.

Table 3. The sharing economy's sustainability claims and its corresponding challenges as discussed in the Global North

SUSTAINABILITY CLAIMS	SUSTAINABILITY CHALLENGES
ECONOMIC	
The sharing economy increases economic activity and provides new economic opportunities.	The sharing economy may cause economic degrowth because it promotes less production and less consumption.
	The sharing economy escapes national accounting measures.
	The sharing economy compromises labour standards and the quality of products and services.
	The sharing economy leads to unfair competition: (a) it causes the closure of some businesses; (b) it circumvents existing regulations and policies; and (c) forces grassroot initiatives to commercialize or become more at risk of corporate takeover.

SUSTAINABILITY CLAIMS	SUSTAINABILITY CHALLENGES
The sharing economy is an alternative source of income/funding.	
The sharing economy facilitates microentreprenurship.	
The sharing economy offers more efficient and cheaper products and services.	

SOCIAL

SUSTAINABILITY CLAIMS	SUSTAINABILITY CHALLENGES
The sharing economy encourages increased social connection by creating a sense of trust and/or community belongingness in the platforms.	The sharing economy hinders social connections and facilitates social discrimination by the amount information that is being provided.
The sharing economy increases access of resources to all social classes.	The sharing economy caters more to affluent people.

ENVIRONMENTAL

SUSTAINABILITY CLAIMS	SUSTAINABILITY CHALLENGES
The sharing economy optimises idle and underutilized assets and resources.	The sharing economy overestimates the efficiency gains from optimising product use; it may potentially hinder the replacement of more efficient products and services.
The sharing economy limits the extraction of natural resources and production of goods, and decreases the generation of waste.	The sharing economy results to more consumption, impulse buying and other rebound effects.
	The sharing economy does not prioritise the environment; businesses do not consider the environment as primary concern nor are users motivated to participate due to environmental reasons.

On the other hand, sharing economy initiatives from grassroots associations may have more promising sustainability potentials. As defined by Smith (2000), grassroots associations are "locally based, significantly autonomous, volunteer-run, formal non-profit (i.e., voluntary) groups that manifest substantial voluntary altruism as groups and use the associational form of organisation and, thus, have official memberships of volunteers who perform most, and often all, of the work/activity done in and by these nonprofits." Yet sharing economy grassroots organisations face coercive and isomorphic pressures that drive them towards becoming more commercially-oriented which may, in the process, lose their grassroots qualities (Martin et al., 2015).

The rhetoric of the sharing economy's sustainability is simple and straightforward but concrete evidence is non-existent and at most, anecdotal and non-representative of the sharing economy. Studies are not comprehensive in terms of assessing all the three dimensions of sustainability and usually address particular sectors only (e.g. transportation or accommodations), but not the sharing economy in its entirety. Furthermore, efforts to adopt sustainability indicators using existing metrics for conventional industries are underway (Friedrich & Helmig, 2016) but will unlikely fit the particularities of the diverse sharing economy business models. To say the least, the sharing economy is plagued with uncertainties, especially in terms of its ability to contribute to sustainability, hence the need for more researches. Despite the unknowns and apprehensions on the sharing economy, it continues to grow and expand geographical boundaries, from Silicon Valley to around the world.

3   Analytical Frameworks

As alluded to in the previous Chapter, methodology for assessing the sustainability of the sharing economy platforms is still being developed. Existing approaches, such as the Circles of Sustainability (Daunorienė et al., 2015) or other similar radar charts, tend to capture a static picture of the current extent of sustainability. However, sustainability should be viewed as something dynamic that evolves through time; what is considered as sustainable now may not be viewed sustainable in the future (Garud, Gehman, & Karnøe, 2010). Furthermore, it is important to acknowledge that innovations and movements that claim to be sustainable do not operate in a bubble. It occurs within an environment that may inhibit, resist or even terminate its development. As Demailly & Novel (2014) put it, "the current environmental performance of these [sharing economy] practices, which will a priori continue to increase, is less important than the conditions for improving their sustainability."

This Chapter describes the two analytical frameworks used in this thesis. To provide a foundation on the sustainability claims and challenges of the sharing economy in Metro Manila, the three *pillars of sustainability* (i.e. economic, social and environmental) and the frame concept, particularly the *core framing tasks*, are first used to deconstruct the sharing economy initiatives. The concept of framing is a good complement to the three pillars of sustainability; while the pillars provide insights into *what* the claimed sustainability potentials are, the core framing tasks elucidate *if* and *how* sharing economy platform developers position the sharing economy as a sustainable solution. Building on these, the *sustainable transitions framework* is used in this research as an analytical framework to assess how it attempts to actualise the sustainability potentials. Particularly, the sustainability transitions framework is employed to identify the pathways in which the sharing economy is creating: whether it is towards contributing to sustainability or otherwise. Together, these two analytical frameworks can guide future discussions on how actors can create the conditions for improving the sustainability of the sharing economy.

3.1   Evaluating Sustainability Claims

Literatures from various disciplines have applied the sustainability pillars as a framework for assessment and as a management tool (Castellano, Ribera, & Ciurana, 2016; Cinelli, Coles, Sadik, Karn, & Kirwan, 2016; Laurence, 2011; Manara & Zabaniotou, 2014; Mota, Gomes, Carvalho, & Barbosa-Povoa, 2015). This thesis employs it as a starting point for data analysis as has been demonstrated in Section 2.3.

3.1.1   The Frame Concept: Core Framings Tasks

A frame is "an interpretive schemata that signifies and condenses the 'world out there' by selectively punctuating and encoding objects, situations, events, experiences, and sequences of action in one's present or past environment" (Steinberg, 1998). Adherents advance framings of a system by engaging in discourses while also providing explanation as to how these can bring out the desired results (Martin, 2016). In effect, agents "select some aspects of a perceived reality and make them more salient in a communicating text, in such a way as to promote a particular problem definition, causal interpretation, moral evaluation, and/or treatment recommendation" (Entman, 1993). More specifically, Benford & Snow (2000) explained that a characteristic feature of collective action frames is its *action-oriented function,* or otherwise known as *core framing tasks*. In deconstructing collective action frames, there are three identified tasks that constitute a complete way of framing for instigating action: *diagnostic*, *prognostic* and *motivational* framings (Benford and Snow 2000).

- *Diagnostic framing*: This involves articulating a problematic condition or situation. Although not necessarily, problems are usually asserted along the lines of injustice. In lieu of this, diagnostic framings may also include attributing the problem to the agent or entity responsible, liable or culpable. It is also not necessary that the groups and organisations identify the same agent or entity; oftentimes there is disagreement in this attributional component.

- *Prognostic framing*: By determining the problem and its causes, movements propose solutions, strategies and targets, hence the second framing task is prognostic framing. Naturally, the identified problems would inform and limit the scope of potential solutions; the direct relationship between the cause of the problem and the solution to which are ideal. The prognostic framings may involve providing a counterframe that refutes other solutions suggested by adversaries to justify their own proposal. Like the disagreement in identifying the problem, differences in proposals within groups of a movement are also common.

- *Motivational framing*: In order to galvanise action, proponents and agents present vocabularies of motive. Examples of these vocabularies include matters of severity, urgency, efficacy and propriety.

The sustainability movement has endured throughout the years not only because of the continuous engagement of its advocates, but also because of how it strategically frames the movement and how opponents and mere observers continuously challenge the framings. The dialectic dialogues among these actors have created a collective action frame that is composed of not only individual attitudes and perceptions, *but* also of negotiated shared meanings (Benford & Snow, 2000). Characteristically, this implies that meanings and ideologies are being actively constructed and are evolving through time, as propelled by various agents with similar and opposing views. Ultimately, collective action frames are action-oriented in such as way that they are directed towards garnering support, legitimising movements, and provoking action (Benford & Snow, 2000). Although the concept of frame was initially developed within the social sciences, particularly in the social movement literature, it can be applied to any discipline or sector as a tool to analyse how actors advance certain beliefs and advocacies with the goal of mobilising support and action. As such, it has also been employed in sustainability studies that demonstrate the importance of frames and framing processes in enabling action towards sustainability (Bradbury, 2015; Franklin & Blyton, 2011; Geels, 2014; Lindseth, 2004; Markowitz, 2007; Martin, 2016; Pellow, 1999; Zoch, Collins, Sisco, & Supa, 2008).

The sharing economy exhibits the attributes of both a business and a social movement (Schor, 2014; Slee, 2016). It is a business movement because it is creating new business model alternatives. At the same time, the sharing economy is a social movement as its concerns and affects societal relationships, and, as discussed earlier, assumed to be advocating a more sustainable lifestyle. Hence, for simplicity, this study will refer to it as the sharing economy movement. Furthermore, it is seen as a movement-specific collection frame that could potentially contribute to the broader master frame of the sustainability movement.

To limit the scope of the actors involved in creating the framings, this research primarily focuses on the business proponent's perspective. This research will look at if sharing economy platforms knowingly or unknowingly apply the core framing tasks to advance their propositions. Particularly, examining the core framing tasks can help determine if and how the sharing economy is creating pathways towards sustainability or not. Similarly, using the sustainability transitions framework, where transitions are perceived to be purposeful and

goal-oriented, the role of actors and agencies in guiding the process can be highlighted (Smith, Stirling, & Berkhout, 2005).

3.2 Identifying the Sustainability Transitions Pathways

The sustainability transitions literature is a growing field of research that seeks to explain how systems can be and are transformed to more sustainable modes of production and consumption. Sustainability transitions seek to challenge socio-technical regimes, or institutionalised systems of incumbent industry structures, dominant technologies and infrastructures, prevailing knowledge base, accustomed user relations and markets, public existing policies and political power, and cultural significance and association. All together, these regimes create a network of interdependencies and lock-in that prevent the entrance of new innovations (Smith & Raven, 2012). Hence, more often than not, changes in the system are difficult and if successful, these are introduced at a slow pace (Markard, Raven, & Truffer, 2012). Sustainability transitions then refers to the process of transformation requiring fundamental changes and entailing multi-dimensional responses and actions from the technological, material, organisational, institutional, political, economic and socio-cultural sectors that occurs over long periods of time (Markard et al., 2012).

The role of niches as sources of path-breaking innovation is highlighted in the sustainability transitions literature. As it has been observed in several cases, the assumption is that sustainable innovations are at a disadvantageous position and should therefore be protected against premature rejection in early stages of their development (Raven, Kern, Verhees, & Smith, 2016). Niches are protected spaces that manage temporary immunity from selection pressure of the incumbent socio-technical regimes (Kemp, Schot, & Hoogma, 1998). In these protective spaces, they manage to further innovate and acquire the necessary support to establish firmly within or against the socio-technical regimes. In time, they develop the necessary traction to outgrow their protective shield, and to compete with and enable a systematic transformation of the socio-technical regimes towards sustainability. Smith & Raven (2012) articulated three functional properties and processes of niches: shielding, nurturing and empowering.

- *Shielding*: Incumbent socio-technical regimes enforce a selection environment that inhibits the growth of innovations, especially those that may potentially undermine its dominance. Niches can afford to utilize or create a protective space that shields the innovation away from selection pressure. These spaces could either be spaces specifically targeted and developed by advocates (*active shielding*) such as demonstration programmes (Kemp et al., 1998) and strategic firm investments (Pinkse, Bohnsack, & Kolk, 2014), or have existed even prior to the mobilization of advocates (*passive shielding*), such as geographic areas (Verbong, Christiaens, Raven, & Balkema, 2010) and environmentally concerned communities (Truffer, 2003).

- *Nurturing*: Taking advantage of this protective space, organisations further develop path-breaking innovations in niches. The nurturing process can take several forms. It can come from positive expectations, social networks, feedbacks and learning processes, etc. (Schot & Geels, 2008).

- *Empowering*: Finally, the empowerment processes enable path-breaking sustainable innovations to develop either by thriving in unchanged selection environment (*fit and conform*) or by competing with selection environment (*stretch and transform*), both ideally resulting in more sustainable production and consumption processes. The difference between these two empowerment strategies is that the latter refers to innovations that

are changing the selection environment to work to their advantage, while the former strategy do not call for radical changes. The difference implies that in a fit and conform strategy the protection is only temporary and once the shielding is removed, the innovation starts competing under mainstream selection pressures. In the stretch and transform strategy, part of the shield remains and facilitates institutionalisation of change within the selection pressures (Verhees, Raven, Veraart, Smith, & Kern, 2013).

Related to the functional properties of niches is the process of socio-technical regimes *resisting* the development and growth of niches. Geels (2014) recent contribution to the sustainability transitions research is unlocking this opposing force that determines the success or failure of green innovations from competing with the prevailing regime. Specifically, he looked into the active role of incumbent firms and policymakers who, because of their mutual dependencies, form alliances and use power to prevent changes. Hence, he stressed that actors cannot simply focus on the developing the niche and resisting regimes but must simultaneously be active in destabilising the existing regime.

Overall, by combining the analysis of the sharing economy's sustainability claims in relation to how platform developers frame the sharing economy, and the analysis of how niches' shield, nurture and empower and how regimes resists the sharing economy, it is possible to assess if indeed the sharing economy is building a pathway towards sustainability.

4 Rationalisation of the Research

The sharing economy is a relatively novel concept and this creates numerous research opportunities particularly in the sustainability field. This research focused on two implicit and explicit research gaps. First, there is a considerable dearth of academic knowledge and empirical data on the sharing economy especially from the Global South. Second, there is limited study substantiating the claim that the sharing economy could indeed be an alternative pathway to sustainability.

To the author's best knowledge, none of the peer-reviewed literature has specifically tackled case studies from the Global South. Extending this research scope to grey literature similarly reveals a bias towards the Global North. For instance, online sites that attempt to consolidate sharing economy initiatives around the world such as *Ouishare* (http://ouishare.net), *Mesh* (http://meshing.it) and *Collaborative Consumption* (http://collaborativeconsumption.com), are heavily focused on the Global North; the underrepresentation of the Global South paints a picture that sharing economy practices are either very limited or there is little participation from users. However, this is a rather inaccurate depiction. Businesses and business models from the Global North are spreading to the South. For example, the San Francisco car sharing company *Uber* now operates in 25 cities in South and Central America, in 11 cities in the Middle East, in 9 cities in Africa, and in 71 cities in Asia (Uber, 2016). *Airbnb* also has listings in over 34,000 cities and 18 global offices, of which 4 are in Asia. Yet, while there are numerous sharing economy practices currently being implemented, no research has been done on analysing how local context affects the implementation of the sharing economy (B. Cohen & Kietzmann, 2014). Furthermore, as Schor (2014) postulates:

> Ultimately, the ability of the new sharing practices to help catalyze a social transition may also depend on the form these initiatives take around the world. As the sharing economy expands in Europe, its practices are likely to be embedded in political, regulatory, and social contexts which are more attuned to the stated values of fairness, sustainability, openness, and cooperation. In Latin America, the leftward shift toward social solidarity, poverty alleviation, and democracy also suggests a context more conducive to a cooperative and community-oriented sharing movement, as we have seen in Ecuador. For those of us in countries where the pressures to commodify and concentrate value from these platforms are most intense, these developments can reveal possibilities.

It is likely that sharing economy initiatives introduced in the Global South will be increasing in numbers in the coming years. According to a recent global survey[1] by Nielsen (2014), Asia-Pacific (78%), Latin America (70%) and Middle East/Africa (68%), most of which represent developing nations, are *willing to share* their goods and services (Figure 1). This is in stark contrast to the trends from Europe (54%) and North America (52%). Likewise, in terms of *utilizing shared goods and services*, Asia-Pacific (81%), Latin America (73%) and Middle East/Africa (71%) are also willing to participate in such transactions. Again, this is in contrast to the likelihood of leasing from Europe (44%) and North America (43%). The 2015 Microsoft survey on how personal technology affects peoples' lives partly explains these differences. In their poll, technology-enabled sharing economy services are perceived to be better than traditional services by 59% of people from developing countries and by only 33% from developed countries (Penn, 2015). This rise for the sharing economy in these developing countries will not go unnoticed; the sharing economy is observed to be gradually

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[1] The study surveyed 30 000 consumer and has a ±0.6 margin of error.

spreading to the Global South (Ernst & Young LLP & Nasscom, 2015; Helms & Palacios, 2016; Liem, 2015; Parag, 2015).
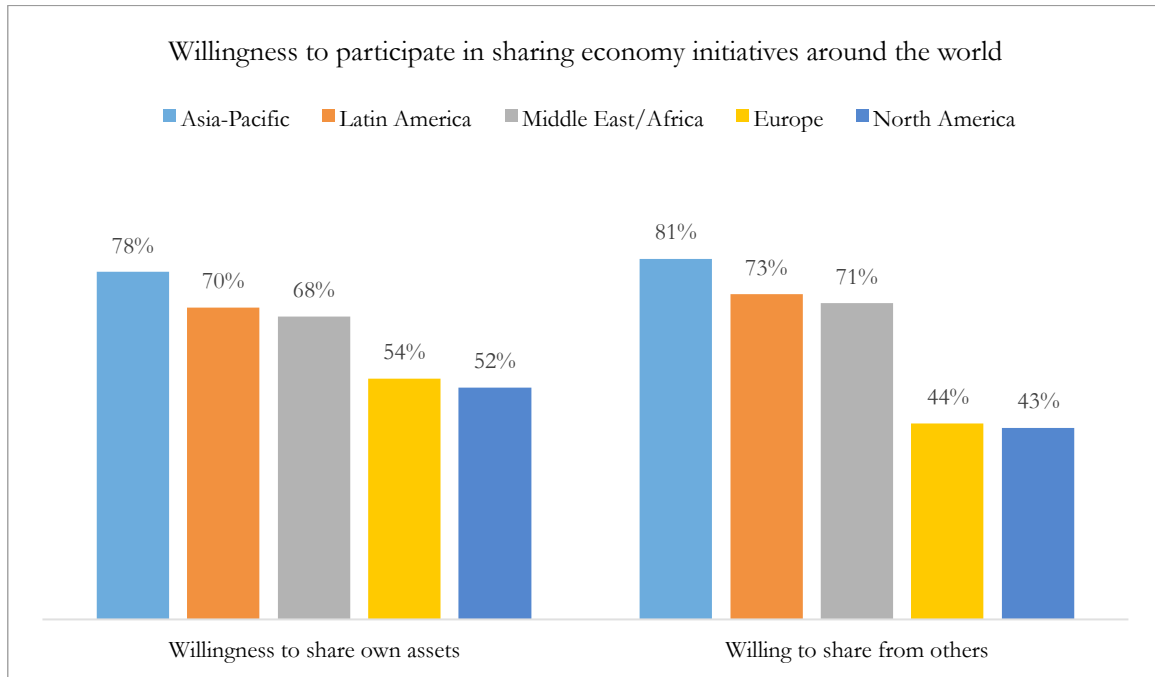
Figure 1. Willingness to participate in sharing economy initiatives around the world.
Data source: Nielsen, 2014

Secondly, in Chapter 2, the sustainability claims and challenges discussed are derived from several studies that examine the three pillars independently of each other. Furthermore, it is problematic that the sustainability claims and challenges are taken all together regardless of the economic sector that the sharing economy initiative belongs to. Many of the studies focus on specific sectors, particularly the transportation and accommodation sectors, and are taken to represent the entire sharing economy narrative. This runs the risk that the sustainability potentials can be misrepresented or exaggerated, while challenges could be diluted or generalised. An investigation of the differences in framings of sustainability claims by the sharing platform proponents from diverse sectors could reveal nuances with regard to the legitimacy of the claims.

In line with this thinking, if the sharing economy indeed realises its sustainability potentials, then it could become an alternative pathway that could challenge the hyper-consumerist practices of today's society. In that case, both the Global South and the Global North have the ability to maximise this potential to their own advantage. Yet, despite the growth of the sharing economy in terms of diversity and user base, this potential has not yet been actualised. However, if the sharing economy is heading towards reinforcing today's hyper-consumerist lifestyles, then it has to be averted. Otherwise, it will only worsen the urban challenges cities are facing.

5 Methodology

This research employed several research methods that delivered complementing outputs. Figure 2 is a schematic diagram that outlines the steps and methods pursued in this research. Taken all together, these outputs were essential for answering the posed research questions (see Chapter 1). It is important to note that the whole process is iterative with several feedback loop systems in place. For instance, while mapping, the criteria had to be refined to better reflect the reality on the ground and to properly limit the scope of the study.
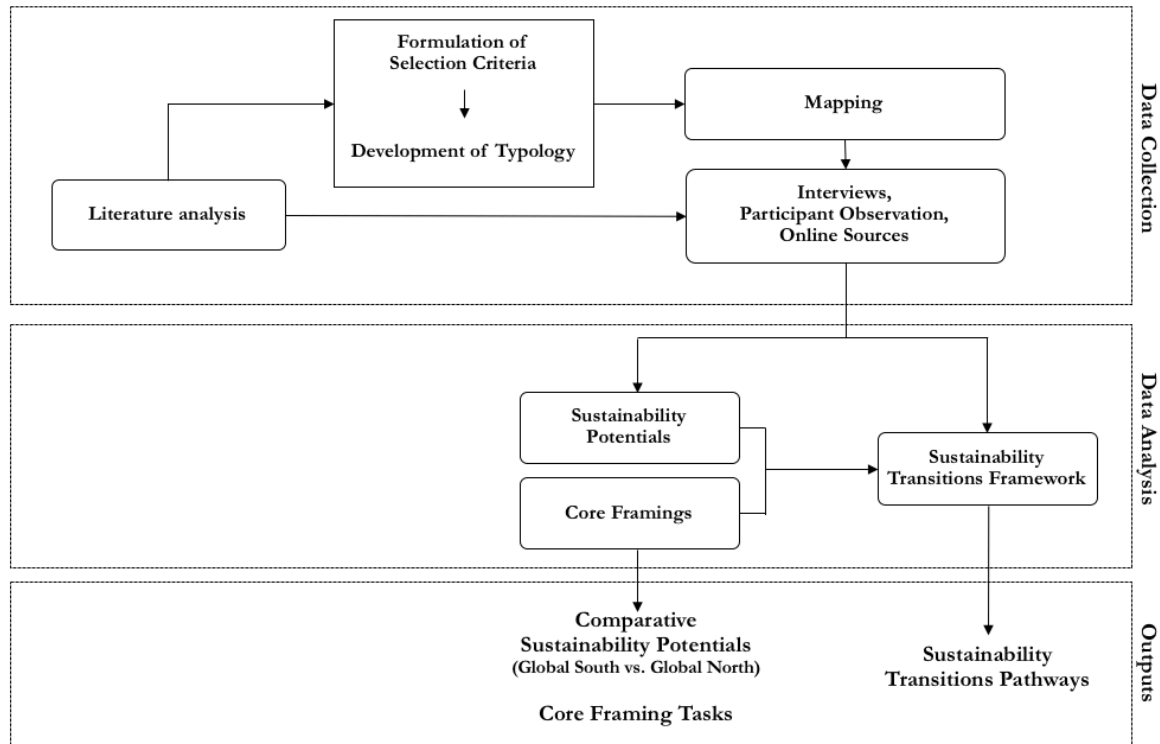
Figure 2. Schematic diagram of research design

5.1 Literature Analysis

This method involved gathering journal articles, books, grey literature and online sources to provide insights on the current discourse surrounding the sustainability of the sharing economy. Since most of this information was derived from the Global North, it served a dual purpose: first, it offered a good foundation for developing the mapping exercise design and interview questions; second, it was used to compare and contrast the sustainability claims with the Global South data for the qualitative analysis section.

As presented in the Chapter 2, research on the sustainability of the sharing economy falls short of being comprehensive and validated through empirical research. By pooling these together, albeit without attempting to be exhaustive, it became a basis for analysing the results of the Global South data.

For the literature analysis, the information were derived from academic and journal publications, conference papers from the 1st and 2nd International Workshops on the Sharing Economy (IWSE), Philippine local periodicals (e.g. Inquirer, Rappler), regional and global periodicals (e.g. e27, Tech in Asia, The Guardian), and websites of the sharing economy platforms. Databases such as Google Scholar, JSTOR, Science Direct, Web of Science and the likes were used. The keywords used for the search inquiry were a mixture of the following:

sharing economy, collaborative consumption, Global South, developing countries, sustainability, economic potentials, social potentials and environmental potentials.

5.2 Mapping of Sharing Economy Initiatives

Mapping included a two-staged process: first, developing criteria to inform the selection process; second, categorising the sharing economy initiatives into an appropriate typology. The purpose of this method was to collect and review potential candidates for the local sharing economy platforms in Metro Manila. Consequently, this provided a picture of trends that exposed similarities and differences of practices from the Global North. As alluded to in Chapter 2, the diversity in definition and typology might pose a problem in identifying sharing economy initiatives. Nonetheless, this exercise can provide a comprehensive overview of what is currently out there without seeking to be neither too broad nor too narrow that it unjustifiably distorts the local narrative.

5.2.1 Selection criteria

In Chapter 2, four commonalities of sharing economy platforms were identified. Building on this and tailoring it to this research, a set of criteria was developed. Although many of the platforms are not explicit in identifying themselves as part of the sharing economy, possession of the characteristics described below merited inclusion in the inventory of sharing economy initiatives in Metro Manila.

1. *Access over ownership*: It provides users temporary access to goods and services without the responsibilities attached to ownership. Nonetheless, this could also include transfer of ownership of used or second-hand goods. Hence, activities can range from renting and lending to reselling, swapping and donating. This implies also that transactions could involve monetary and non-monetary forms, or tangible and intangible units (e.g. time, reward points).

2. *Maximising resource utilization*: Idle assets are optimised to its capacity and unwanted assets are minimised. This expands the coverage beyond goods to space and services (commonly referring to time and skills).

3. *Distributed power*: Consumers are not simply passively buying but are actively engaging in the production, creation, financing and/or delivering of goods and services. It redefines traditional business-to-consumer (B2C) transactions by enabling peer-to-peer transactions. This also reflects that although some of the sharing economy platforms are privately owned, the development heavily depends on the social dynamics that transpires within the platform such as self-marketing, reputational ratings and others (Hamari et al., 2015).

4. *Digital platforms and Internet connectivity*: Technology and the Internet facilitate transactions and connections; platforms of exchange happen through online websites, mobile applications or a combination of both. Thus, activities conducted purely offline, like traditional flea markets, do not qualify in this mapping. Similarly, grassroots and community-bounded initiatives are excluded if it is not mediated digitally. In addition, social media platforms (e.g. Facebook) that can facilitate goods and services sharing tend to have a limited market reach and/or be unorganised. Therefore, for the purpose of this research, it is also excluded.

Furthermore, to focus the criteria on the case study and set the boundary of the scope, the following are additional criteria:

5. *Metro Manila operations*: With Metro Manila as the selected area of research, the sharing economy initiative should be currently operating in more than one of the 17 cities, either in full operations or are in its alpha or beta run. In order to generate information on trends, challenges experienced and lessons learned, platforms that are inactive or have recently ceased operations (from 2013 to present) are also considered. Consequently, small community-oriented initiatives that only exist in a village or have restricted geographical membership are excluded. This criteria of local embeddedness is critical to reflect the character of local ventures. Hence, international platforms like *Uber* are considered because they have established offices in Metro Manila that gives them opportunity to better adapt their business models to local conditions. On the other hand, a regional office, such as the case of *Airbnb* whose Southeast Asian office is based in Singapore, is excluded.

5.2.2 Typology

A preliminary list of sharing economy initiatives was consolidated through online research. It was reasonable to begin with startups or "temporary organisation[s] designed to search for a repeatable and scalable business model" (Blank, 2013) since almost all of sharing economy platforms begin within the startup community due to its novelty as a business model. Although no database aggregating these startups exists, *Startup PH*, a Facebook Group was used as a starting point. This is a popular platform used by members, mostly entrepreneurs and innovators, to promote and exchange ideas about their initiatives. In line with this, it was also useful to gather the views of innovation and incubator hubs, as they are among the usual sources of mentors, information and capital for startups. They also actively guide in the development of the startup and to a certain extent, have a say in the direction of the whole startup ecosystem. The inventory grew through online articles, cross-referencing and referrals from the interviewees.

Typologies are designed in order to simplify an event or phenomenon with diverse features and characteristics. Chapter 1 illustrates the variety of sharing economy typologies developed by researchers. Since this research does not seek to invent a new classification scheme, *Honeycomb 2.0* (Owyang, 2014) was identified to be the most appropriate typology for this exercise. The Honeycomb model took inspiration from the resilient hexagonal structures made collaboratively by bees to store honey and eggs, and grow their colony. Similarly, the collaborative economy, the term preferred by the author, allows individuals to access, share and grow resources efficiently (Owyang, 2014). It straightforwardly categorises sharing economy initiatives according to 12 economic sectors, each with further subcategories, to conveniently identify the existing industries they compete with. This type of categorisation also has the advantage of informing appropriate policy intervention measures since government agencies in the Philippines usually have mandate over one type of industry. Furthermore, this model also includes a wide variety of examples that may provide insight on the similarities and difference from the Global North. While a newer classification system, *Honeycomb 3.0* (Owyang, 2016) was released in March 2016, it incorporates traditional business-to-consumer models that are either add-ons or back-up support to other sharing economy platforms (e.g. insurance). Also, this expanded model loosely includes intangible goods such as data and analytics that are irrelevant to this research in such a way that it is only indirectly part of the sharing economy.

5.3 Interviews, Participant Observation and Online Research

Semi-structured interviews were requested for both niche and regime actors, with a primary focus on the former (see Appendix A). Niche actors constituted of sharing economy platform representatives, who were most often the founders, and innovation and incubator hubs

representatives, which help cultivate startups. On the other hand, regime actors were represented by government agencies and existing industries. Attempts to reach more government agencies and industries were made but many were either unable to direct the author to the appropriate unit or person in charge or are not currently dealing with issues regarding the sharing economy. Hence, to compensate for the limited interviews done for regime actors, online articles were used as primary sources of information for their viewpoints.

Representatives of niche actors per category were selected based on length of operations (i.e. those with more than one year of operations were preferred), and market size (i.e. those with bigger user base were preferred or most popular among consumers). A general interview guide was first developed to ensure that basic and general questions are similarly covered for all informants (Appendix B). To tailor the interview guide to the interviewee, specific questions were also developed to reflect the nature of the platform and the sector being represented. Questions were generally designed to be broad to allow for wider answers that could later on be directed to more specific questions. Skype and phone conversations and email correspondence were alternative options for the few who could not be interviewed personally. If any of the interview methods were not possible, online resources from websites and media were used as proxy data.

Prior to each interviews, online research about the platform or organisation was conducted. The usual references are their websites and news articles concerning them. This was important in order to make the conversation more focused given the limited time availability of the interviewees. These data were used as a starting point or to clarify, validate or update its accuracy.

At the beginning of each interview, the interviewees were asked if the conversation could be recorded. This allowed the interviewer to fully focus on the discussion and ask relevant follow-up questions. These recordings were later on used to generate notes from the interview. Although 10 interviews were transcribed verbatim, it became apparent that this was unnecessary, as no social behavior or language analysis was needed in the research. For the remaining of the interview materials, only notes and quotes were taken.

Participation of the researcher in using the platform was also done where applicable and feasible. Particularly, this was done for the transportation, space and services sectors (Appendix A also indicates where personal engagement with the sharing economy platforms were made). This provided a more in-depth understanding of how the platform works, and enabled interaction with other users. In effect, the information gathered from these multiple sources (i.e. organisation's website, interviews and observation) were triangulated to test for consistency and accuracy. Furthermore, this helped guarantee that the data collected is rich, complete, unbiased and robust (Patton, 1999).

5.4 Qualitative Analysis

This research aims to (a) identify and compare the sharing economy's sustainability claims and how actors frame it with the discourse in the Global North; and (b) investigate the possible trajectory the sharing economy is heading towards. It used two analytical frameworks to answer this: sustainability pillars with the frame concept and sustainability transitions framework.

5.4.1 Sustainability Claims

The sustainability claims of the sharing economy in Metro Manila were first described according to the three pillars of sustainability (i.e. economic, social and environmental).

Simultaneously, the analysis included a comparison of the sustainability claims with that of the Global North gathered in the literature analysis. The comparison was made according to the selected categorisation (i.e. Honeycomb 2.0) as an additional layer of analysis. This revealed nuances in the sustainability claims of many literature sources that tend to generalise sustainability potentials for the entire sharing economy simply based on a few platforms or by examining only one economic sector (e.g. transportation, spaces).

In order to distinguish the extent of the similarities and differences of the sustainability framings within a category, *weak*, *partial* and *complete* adoption of the sustainability claims were identified. It is important to note that the level of association was not directly asked during the interviews. Rather, these were derived from the answers of the informants and were supplemented by online sources. The broad objective of this exercise is to simply assess if the framings were at least adopted or not by the interviewees. Platforms that were not interviewed were excluded on the basis of incomplete information.

Extent of adoption	Indicator (No. of interviewees who used the framing)
Weak	Less than half
Partial	Half or more than half
Complete	All

5.4.1.1 The Frame Concept: Core Framing Tasks

The core framings functions (i.e. diagnostic, prognostic, and motivational) were used to further dissect and reflect the differences in the sustainability framings according to sectors. In doing so, the assumption is that platforms belonging to the same sector are seeking to address the same problems. Likewise, this means that each sector is challenging the same incumbent regimes, which are unable to effectively offer suitable solutions to solve the problems it seeks t address.

After unpacking the core framing tasks into sectors, all the sharing economy platforms are then taken as one sharing economy movement. By using the core framing functions, the sharing economy movement could be analysed on how it packages the problems it seeks to address, how it plans to solve them and what rationale are being used to "call to arms" potential supporters/users. Organisations such as *Collaborative Consumption*, *OuiShare*, *Peers*, and *Share the Worlds Resources* have led the sharing economy movement in the Global North. On the other hand, it is important to note that there is no organisation in Metro Manila that holds these sharing economy platforms together; they are distinct platforms and operate independently of each other. However, in this research, since they are considered as part of the sharing economy, they are taken collectively as if it is operating as one sharing economy movement.

5.4.2 Sustainability Transitions Framework

Finally, the sharing economy was analysed in light of the three functional processes of *shielding*, *nurturing* and *empowering*. This helped determine the direction of the sharing economy; it used to determine if indeed it is creating an alternative pathway to sustainability. *Resisting* forces were also examined to reflect that external processes and dynamics are relevant in identifying if the sharing economy is pressured to succumb to existing regimes which are presumably characterised by unsustainable practices.

6 Results

This Chapter presents the results of the data collected from the mapping exercise, interviews, participant observation and online sources. This guided the development of the subsequent Chapters on Analysis and Discussion. A brief background on Metro Manila is first presented followed by brief overviews of the sharing economy platforms by sector.

6.1 A Snapshot of Metro Manila

Metro Manila, also referred to as the National Capital Region, is the seat of political power and center of economic activities in the Philippines. It is composed of 16 cities including Manila, the country's capital, cities of Caloocan, Las Piñas, Makati, Malabon, Mandaluyong, Marikina, Muntinlupa, Navotas, Paranaque, Pasay, Quezon, San Juan, Taguig and Valenzuela; and the Municipality of Pateros. Of the total 92 million population of the Philippines, 11 855 975 reside in Metro Manila, with an average annual population growth rate of 1.78% (Philippines Statistics Authority, 2010). This places the region among the world's top mega-cities (Demographia, 2016; UN, 2014).

According to the Philippine Statistics Authority (2015), Metro Manila continues to be the largest contributor to the national economy with a share of 36.3% to the Philippines' growth domestic product (GDP); of the 6.1% GDP growth rate in 2014, NCR accounted for the highest contribution at 2.1%. In the same report, the service and industry sectors were the two main economic sectors that boosted the region's economy with a contribution of 81.0% and 18.8% in 2014, respectively, with the remaining coming from the agriculture, hunting, fishery and forestry (AHFF) sector. Despite the industrialised activities of the region, 44.83% of the land is used for residential purposes, and the rest is assigned for roads and open spaces (28.43%), commercial (12.22%), industrial (7.62%) and institutional (6.9%) purposes (Velasco, 2011).

6.2 The Sharing Economy in Metro Manila by Sector

This section presents the results of the interviews and participant observation undertaken, arranged according to sectors. To supplement the interviews, corresponding online research was conducted especially for those platforms that were not interviewed. For the period of 22 March to 5 May 2016, 29 semi-structured interviews, including 25 face-to-face, 2 Skype meetings, 1 phone conversation, and 1 email interview were arranged for both niche and regime actors (see Appendix A for the complete list of informants and interview method used). A great majority of the interviewees (i.e. 25 interviewees) were niche actors since the focus of this research are sharing economy platform developers. Only four regime players were interviewed. Figure 3 illustrates the sources of information on the sharing economy platforms. Almost all interviews lasted at least 40 minutes, with an average length of one hour, except for three interviews that took less than 20 minutes due to circumstantial reasons.

This research was able to interview 19 out of 38 (50%) inactive and existing sharing economy platforms in Metro Manila. In addition, 6 innovation and incubator hubs and coworking spaces (independent to *Flyspaces*) were also interviewed as they are considered as key informants to this study. The information for the remaining 50% that were not interviewed was purely derived from readily available online sources. In effect, during the period of the study and to the author's best knowledge, all sharing economy platforms were sufficiently covered in this research.
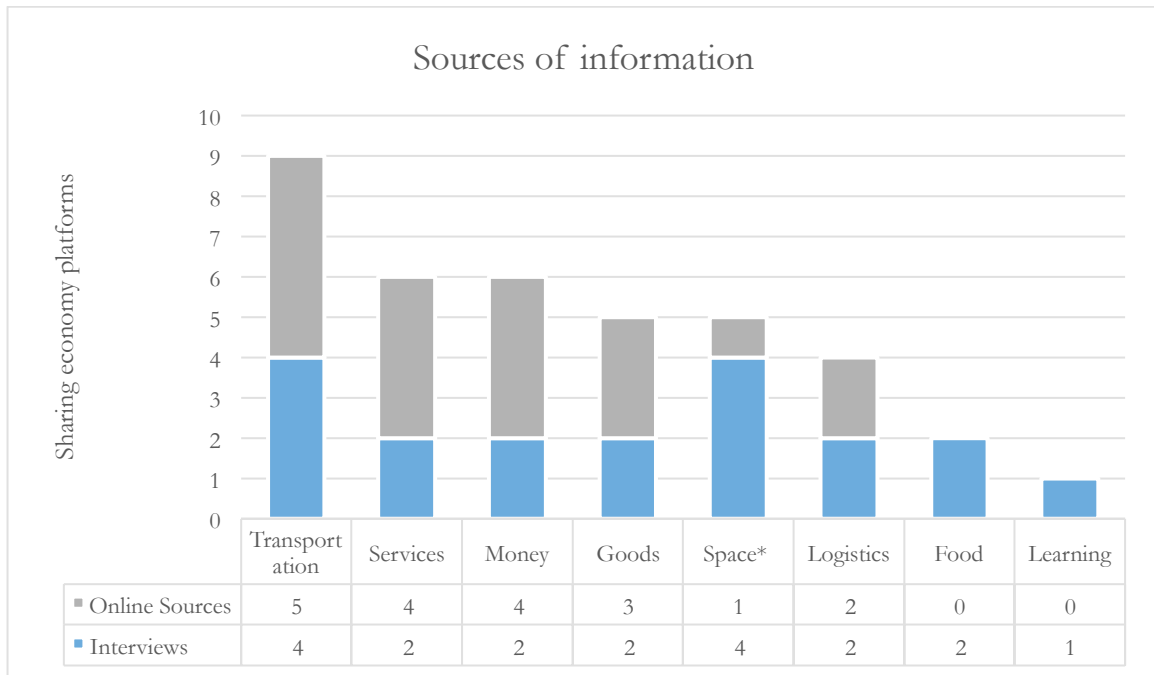
Figure 3. Sources of information on the sharing economy platforms (interviews and online sources)
Spaces: In addition to the sharing economy platforms, 6 innovation and incubator hubs and independent coworking spaces (not associated with Flyspaces) were also interviewed.

Using the categorization based on Honeycomb 2.0 (Owyang, 2014), it can be seen from Figure 4 that the following sectors are represented, in order of richness in sharing economy initiatives: Transportation (9), Services (7), Money (6), Goods (5), Space (5), Logistics (4), Food (2), and Learning (1). It is worth noting that the first Honeycomb model only consisted of the six inner rings with Learning, Health & Wellness, Logistics, Corporate Utilities and Municipal only being incorporated in the expanded Honeycomb 2.0. Metro Manila follows such pattern in terms of concentration and diversification of initiatives. Within a sector, there are subcategories that are saturated with similar services, particular in the transportation services and local deliveries subsectors. Yet there are also sectors without known representation yet.

With the illustration simultaneously showing extant or inactive sharing economy platforms, it could be observed that the transportation and goods sectors have lost at least half of its total population, and with the learning sector losing its one and only platform (i.e. *Khawna*). As will be discussed later on, the closure of these businesses is likely due to the international and regional players that are entering the Philippine market, among many other internal and external factors. With the exception of the goods sector where *Sulit.com.ph*, now *OLX Philippines*, has been in operation since 2006, most of these platforms were launched in 2012 and since then have grown in numbers and diversity. The latest addition in this portfolio is the food sector with *Good Meal Hunting* founded in the last quarter of 2015 and *Plato* in the first quarter of 2016.
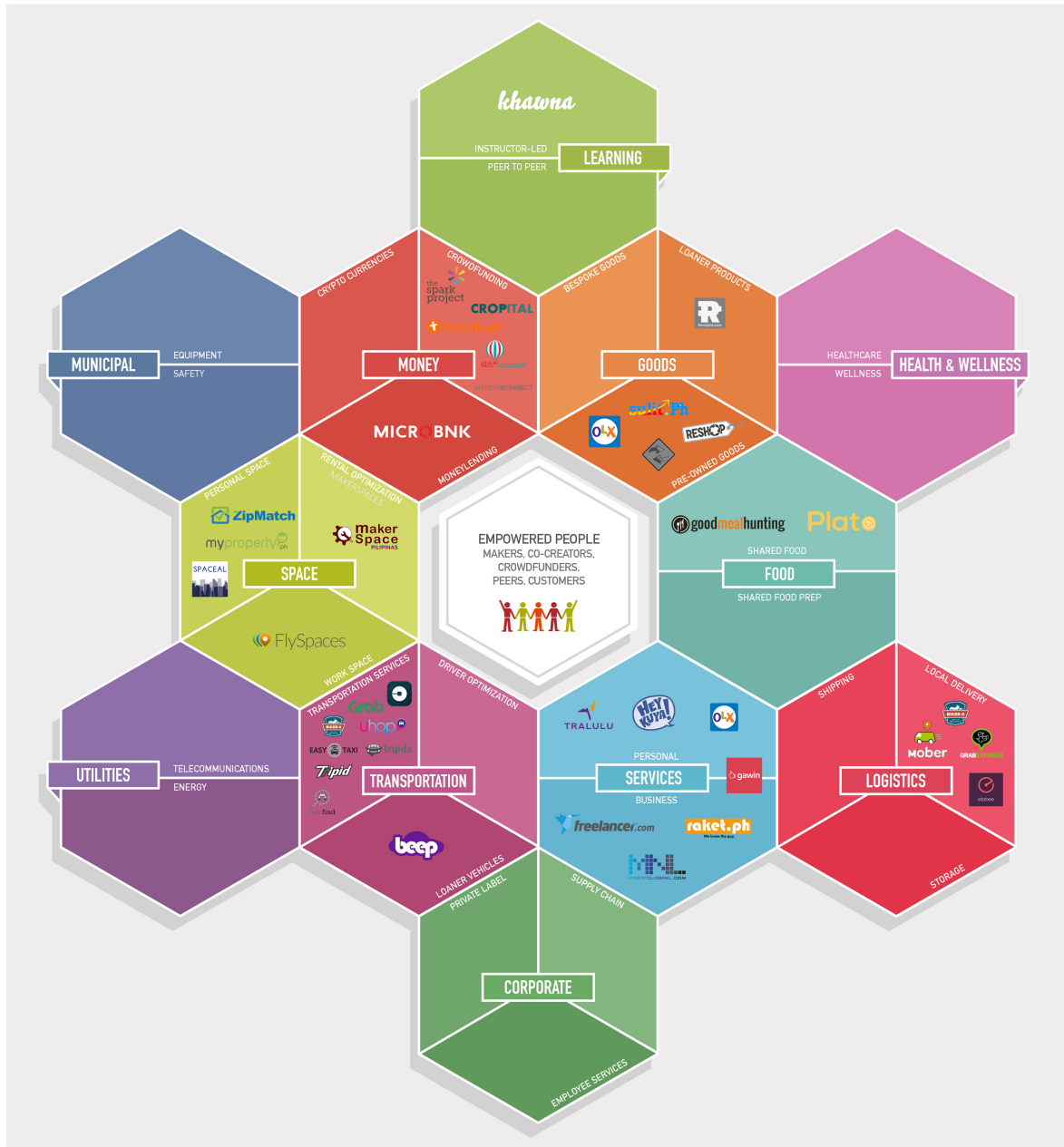
Figure 4. Sharing economy platforms in Metro Manila using Honeycomb 2.0 categorisation
(Logos in grayscale represent platforms that are inactive or have ceased operations)
Template source: Creative Commons from Jeremiah Owyang (2014)

Other key observations are: (1) There is limited diversity in terms of unit of exchange; all require monetary payments for the purchase or rental of products and services, except for *Magpalitan*, a platform for swapping pre-owned goods; (2) Sharing of luxury items and services are not popular platforms yet, except for *uberBLACK*, a product of *Uber* for luxury cars; and (3) Many are on-demand services particularly in the transportation and logistics sectors.

6.2.1 Transportation

Platform	Sub-sector	Name	Position
Grab	Transportation Services	Lorelei Olalia	Public Relations Manager
Tripid	Transportation Services	Michael Ngo Dee	Founder
Uber Manila	Transportation Services	Alexandra Suarez	Driver Operations Manager
Beep a Ride	Loaner Vehicles	Angeline Viray	Founder

With the growing number of vehicles, urbanization and population increase, Metro Manila has been tagged as one of the world's worst traffic condition (Flores, 2015; Hegina, 2015). Hence, it is not surprising that proposals to solve this situation abound; innovation in this sector was brought about by necessity. This trend is similar to the sharing economy in India where transportation is leading in terms of number of players (Ernst & Young LLP & Nasscom, 2015). Within the transportation service subsector, there are *ride-sharing*, or also called *route-sharing*, and *ride-hailing* services. Ride-sharing services involve accommodating several passengers going to the same direction while ride-hailing services usually caters to only one passenger, much like a regular taxi, and are usually on-demand services. All of the existing platforms, *Uber*, *Grab*, *BikerX* and *U-hop*, offer both ride-sharing and ride-hailing services. Interestingly, those platforms that have ceased operations (i.e. *Tripid*, *Tripda* and *Ridefind*) are mostly ride-sharing services, with the exception of one (i.e. *EasyTaxi*).

Tripid pioneered a route-sharing (similar to ride-sharing) mobile platform in 2012 but closed down in December 2015. Smaller local attempts such as *Ridefind* were operational for some time but soon ceased operations too. Two key problems were identified as a cause: lack of market readiness and uncompetitive technology. It goes without saying the sharing economy in the transportation sector heavily relies on good technology. Mr. Michael Ngo Dee of *Tripid* stressed that, "We are reminded that technology is not a solution, but merely a magnifier of intent. The technology behind *Tripid* is an irreversible trend, and ridesharing, in one form or another, will happen with or without our company. In this light, it is how we use technology that makes us who we are and what we become." True enough, their decline was further aggravated by the entrance of the international giant startup *Uber* and Southeast Asian regional startup *Grab* who both became aggressive in capturing the Metro Manila market and had more advanced technology supporting their platforms.

Unlike earlier platforms, *Uber* and *Grab* first offered just ride-hailing services instead of ride-sharing. *Grab,* who targeted only taxis in the beginning, has recently included private cars in their portfolio of products and services. *Uber* led the market by heavily giving incentives to private car owners with *uberX*, for low-cost, and *uberBLACK* for luxury cars. Now, the trend is again expanding to ride-sharing services. *Uber* recently released *uberHOP*, a ride-sharing service available in limited designated pick-up and drop-off points during rush hours, in Metro Manila. This is the third city after Toronto and Seattle where the company decided to launch the product. Also recently, *U-Hop*, a Filipino-owned company launched in 2016, offers the same service for the whole day and with a larger geographic scope. *Uber* attributes the current success of *uberHOP* to the Filipino's familiarity and acceptance of *UberX*. *UberX* provided the data to identify the locations and time for *uberHOP*; according to an *Uber Manila* representative, without *UberX*, it is likely that this new ride-sharing service will not succeed. Their engineering or back end development was vital as well in making the platform work.

Ultimately, all these platforms are trying to help relieve the worsening traffic congestion and compensate for the inefficient public transportation system by providing alternatives modes of transportation. In fact, to offer faster services and circumvent traffic better, *Grab* for a time offered *GrabBike*, a peer-to-peer motor bicycles ride-hailing service. Although this is currently on hold due to regulatory challenges, *BikerX* is a new player exploring this service as well.

While the narratives between car owners and drivers differ from the passengers, economic opportunity is the leading motivator for both. Car owners and drivers can share the cost of the journey and/or earn extra income. On the other hand, passengers are offered an affordable mode of transportation, on top of safety, comfort, and time efficiency (related to loss of productivity).

With something as basic as public service, the social and environmental aspects are unanimously only secondary to the main objectives of these platforms. Filipino and Brazilian carpooling startups *Tripid* and *Tripda*, respectively, promoted the idea of enjoying the ride with strangers and building a community of people who shares ride together. In fact, *Tripda* avoided considering itself as a commercial service. In an interview, Mr. Eric Coser, Country Manager of *Tripda*, said, "We don't allow people to offer rides in Tripda to have profit from it – we are connecting real people driving to work, university or traveling long distances, that happen to have spare seats in their cars and connecting them with people willing to go the same way"(Ferraz, 2015a). *Tripid* even pushes it further by claiming that it was also a move to fight the social injustice in the taxi industry where taxi drivers are subjected to harsh working conditions and are not receiving proper benefits. However, it is very likely that what really prompted people to use these platforms is the convenience promised by the platforms more than anything else. With security features incorporated into the system, this further incentivises people to use the platform. Hence, the rating and reputation system is considered a critical component for all these platforms. For *Tripda*, they even offered a "Ladies Only" feature for some of its rides (Ferraz, 2015a). As for the environmental impact, it goes along the line of: minimising traffic congestion thereby possibly resulting to reducing carbon footprint. It is an acknowledge side effect but is not a highlighted objective articulated directly and explicitly by any of the platforms.

The only peer-to-peer loaner vehicle platform known is *Beep a Ride*. Still in its beta phase, *Beep a Ride*'s mission is to offer a simpler car rental process, fair and transparent pricing, and excellent service for passengers. It claims that *Uber* and *Grab* created an underserved market of car owners with the former catering to drivers and the latter to passengers. It aims to provide car owners a platform where they can make it a full-time work. Coincidentally, an *Uber* car owner who the author has ridden with voiced out the same concern.

6.2.2 Service

Platform	Sub-sector	Name	Position
Freelancer.com	Business Services	Evan Tan	Regional Director for South East Asia
Tralulu	Personal Services	Andrew Cua	CEO and Co-founder

There is an abundance of human resources in terms of unemployed and underemployed people in the Philippines, and Metro Manila is not an exemption with many fleeing the provinces in hopes of getting a job in the capital region. Furthermore, many are not receiving sufficient salary to make ends meet conveniently and are in need of extra sources of income. Others cannot pursue their passion simply because there are no or limited work opportunities,

or the salary is inadequate. It is in this lens that human resources could be seen as underutilized resources in the sharing economy.

The service sector is the most diverse in terms of the problems that these platforms are trying to address. For personal services, *Gawin, HeyKuya* and *OLX* offer convenience to those who are in need of help in fulfilling personal tasks and activities. These are usually popular for blue-collared jobs such as plumbing, cleaning, delivering and the likes but can also offer professional work. *Gawin* also accept registered businesses as service providers. *Tralulu* is platform that connects travelers with local guides to give tourists a more authentic travel experience.

For business services, *Freelancer.com*, *PortfolioMNL* and *Raket.ph* link professional service providers with those who are in need of assistance for their business or work. *PortfolioMNL* specifically caters to artists who wish to showcase their skills and talents in hopes of getting potential clients. Mr. Evan Tan, Regional Director for Southeast Asia *Freelancer.com*, said that there is a growing trend of people preferring to be freelancers. They, along with other platforms, empower these people to pursue their passion, do what they are good at, and work at their own time and pace. In the Philippines, he noticed that while many start with data entry work, they soon and should transition to more technical and high-skilled work that would pay them a higher fee. For this reason, *Freelancer.com* hold several workshops and training sessions to further build the capacities of freelancers.

Initial screening of service providers is not evident for both subsectors. The platforms rely on the rating and reputation system to maintain good quality of service providers. For *Raket.ph*, leaving a rating and reputation feedback is a mandatory field before the payment can be released and claimed. As opposed to *Freelancer.com*, where it is only optional but encouraged for people to use.

International platforms like *Upwork* are popular among Filipinos as well but are excluded in the research for the lack of a known physical office.

6.2.3 Money

Platform	Sub-sector	Name	Position
The Spark Project	Crowdfunding	Patrick Dulay	Founder and CEO
Cropital	Crowdfunding	Ruel Amparo	Founder and CEO

Popular sources of funds include bootstrapping, raising funds from donors and investors, and getting a loan. Bootstrapping requires pulling in internal resources and operating at minimal cost. Fundraising from donors and investors entails heavy marketing and good connections with people and organisations. Loans, on the other hand, are typically attached with high interest, may it be from formal or informal channels. Crowdfunding offers a fourth option: peers investing on a person, business or advocacy.

Crowdfunding platforms seek to address the lack of financial support and access thereof to Filipinos entrepreneurs, projects, causes and advocacies that limit them from pursuing their passion or sustaining their source of livelihood. These local crowdfunding platforms, catering primarily to Filipinos, occupy niches. To wit, *Cropital* funds farmers, *Artisteconnect* supports Filipino artists particularly for music and film, *TeeTalk.ph* gathers fund for advocacy causes from selling shirts, and *GiftLauncher* aggregates money to buy gifts for people. *The Spark Project*

has a wider scope with projects ranging from art, music, and video; fashion and product design; travel and culture; food and beverage; science and technology; and community projects. It is in this sense that there is no direct competition within the sector. As Mr. Patch Dulay, Founder and CEO of *The Spark Project*, puts it, they are allies working for the same cause. *GiftLauncher* is unique within this sector since it seeks to address the mismatch of the wants of the receiver to those who are giving. By posting the specific presents he or she wants, people can simply pool in resources to buy the person's wish list.

The mechanism for showing gratitude to supporters or backers also varies: rewards or a prototype of the product for *The Spark Project* and *Artisteconnect*; profit-sharing (and risk sharing) for *Cropital*; and t-shirt for *TeeTalk.ph*. With *GiftLauncher*, it is simply a donation. Hence, crowdfunding platforms practice a good level of risk management to attract supports and to ensure returns. These entrepreneurs and campaigners usually undergo a screening process to check their eligibility, market potential, among other things. For example, with *The Spark Project*, entrepreneurs go through an application process. In *Cropital*, to mitigate the risks of profit loss for both the farmers and investors, farmers are verified and selected with the local government unit; contracts with buyers are first secured; crops are insured from weather and pest related disasters; and scientific and technical support for the farmers are offered.

Unlike other international crowdfunding platforms, *The Spark Project* and *Cropital* claim to bring in the sense of community in their programs. By being involved in the project, participants become part of a community of like-minded people. The platform is not only a portal where money is being pooled in but they also offer guidance and assistance to the projects they support.

Crowdfunding platforms are confident that this will be a more popular option among Filipinos. Aside from the popularity raised by global crowdfunding platforms, Filipinos now are more connected online and are aware of online money transactions. The platform proponents also believe in the Filipinos desire to help others. Culturally, some even consider this as reincarnation of "bayanihan", a Filipino term that refers to the solidarity to help others together (Edquilang, 2013; Lopez, 2015). For *Artisteconnect*, corporate sponsors such as companies, financial institutions and enterprises can participate as well.

Microbnk is the only known peer-to-peer loaning to support microentrepreneurs. It is about to be launched in the Philippines but is ambitious in also expanding to other similarly emerging markets such as Indonesia, India and Latin America in the near future. It offers lower interests to borrowers and a fair return for lenders.

6.2.4 Goods

Platform	Sector	Name	Position
OLX	Pre-owned Goods	RJ David	Co-founder and Managing Director
Sulit.ph	Pre-owned Goods	Anton Sheker	Founder

Secondhand trading has been a practice for a long time and was facilitated through newspaper and magazine classified-ads. This has now largely transitioned to online classifieds with *OLX Philippines* taking the lead. *OLX* is an international company that has merged with two local online classified-ads, *Sulit.com.ph* in 2014 and *AyosDito.ph* in 2015. In the goods sector, the value proposition for sellers is simply to earn extra cash from goods that are not anymore being utilised, and savings for the buyers. In *OLX*, users are mainly encouraged to sell pre-

owned goods. Nonetheless, they are not prohibited from selling new items. Aside from *OLX*, there is *Sulit.ph* that basically offer the same services. For a time, there was also *Magpalitan*, an online bartering system for exchanging, swapping and trading in, and *Rentipid*, a marketplace for renting anything. Interestingly, these two platforms have explicitly associated themselves with the sharing economy and collaborative consumption. Unfortunately, both are now offline and presumably did not last for a long period.

As a global brand, *OLX* claims that all players (i.e. seller, buyer, community and earth) in the transaction win. However, *OLX* and *Sulit.ph* admittedly acknowledge that they still lack the environmental angle in their business. As Mr. RJ David, Co-founder and Managing Director of *OLX Philippines,* says, since the Philippines is far from having a mature market for online secondhand buying, using the environment as selling point will not work and it would look unauthentic. Nonetheless, both players very much welcome the positive externalities that their platforms create such as the reduction of resources being consumed to produce new goods; the environment is simply seen a healthy by-product created by their platforms. *ReShop.ph* is similar to *OLX* and *Sulit.ph* with the additional option of giving away pre-owned goods for free. *ReShop.ph* has the strongest environmental case specifically promoting a more eco-conscious community. However, like *Magpalitan* and *Rentipid*, *ReShop.ph* is also inactive.

Unlike other sharing economy platforms, the rating and feedback system is not strong in the goods sectors. Mr. David says this creates bias against new sellers and limits the interaction with potential buyers. Mr. Anton Sheker, Founder of *Sulit.ph*, notes that while users demanded the feature, in reality it is rarely used.

In terms of payment, none so far facilitate online payments. Most focus on facilitating communication rather than the money transfer itself; money transaction happens offline.

Most of the local competitors cater to vertical markets like *TipidPC* for computers and gadgets and *Myproperty.ph* for real estate. International competitors such as *Duriana* and *Carousell*, peer-to-peer marketplaces for selling and buying bespoke, new or pre-loved goods, are also gaining some momentum in Metro Manila. While both have online presence, they are not considered in this research since they lack the local office criteria.

6.2.5 Space

Platform/ Business/ Organisation	Sub-sector	Name	Position
Flyspaces	Work Space	Mario Berta	Founder and CEO
Colab Xchange	Work Space	Francesca Zimmer-Santos	Founder
47 East	Work Space	Hanika Oyco	Marketing Officer
Brainsparks and Bitspace	Innovation and Incubator Hub and Work Space	Lionel Victor Belen	Founder
Impact Hub Manila	Innovation and Incubator Hub and Work Space	Ces Rondario	Cofounder
Launch Garage	Innovation and Incubator Hub and Work Space	Vance Ching	Community Hacker
Spaceal	Personal Space	Benjamin Puzon	Marketing Manager and Innovation Consultant, BlastAsia, Inc.

Zipmatch	Personal Space	Carrissa Hiquiana	Public Relations Head
Makerspace Pilipinas	Makerspaces	Arthur Galapon	Coordinator

With urbanization and growing population, space is among the top issues and resources challenges that Metro Manila face. Associated with this is the rising cost of renting spaces. *Flyspaces*, describes itself as the *Airbnb* for workplaces, is a marketplace that curates a database of short-term work and meeting spaces for entrepreneurs, startups, small and medium enterprises (SMEs) and others. According to Mr. Mario Berta, Founder and CEO of *Flyspaces*, real estate usually represents the highest expense for these people; *Flyspaces* wanted to provide an alternative option where people can simply select from a range of rental options that would be cheaper and more convenient than long term rental or buying an office space.

However, not all coworking spaces are registered in *Flyspaces*. For example, *47 East*, a coworking space in Quezon City wanted to enlist their space in *Flyspaces* but was apprehensive with the 20% fee that is being taken away from them for every booking. To date, based on the researches of the author, there more than 20 coworking spaces in Metro Manila. Most are located in the business district, Makati, and highly commercialized cities like Quezon. Many are also associated with innovation and incubator hubs such as *Impact Hub, Brainsparks* and *Launch Garage*. While none explicitly markets the environmental contribution of coworking spaces, Ms. Ces Rondario of *Impact Hub* recognises that decentralisation of the workplace gives people the option to travel less.

Mr. Berta noticed, however, how different coworking spaces are in Asia. Unlike in the US and Europe, users of coworking spaces in Asia are more quiet. He supposes that this is because Asians are maybe more sharing in personal matters but not in business affairs. Based on the author's observation, this varies from one coworking space to another. For big coworking spaces such as *Impact Hub*, the chances of interaction are lower because of dispersion. As opposed to smaller spaces such as at *Bitspace*, the size makes the space more intimate and makes connections among users more compelling.

When it comes to personal spaces, while there is no local *Airbnb* counterpart *per se*, *Spaceal*, *Zipmatch* and *MyProperty.ph* are marketplaces for living spaces from house and lot, town house, condominium to apartment. Although, *Zipmatch* and *MyProperty.ph* specialise more on selling new units as opposed to rental or pre-owned properties. These platforms curate the all the typical information lessees commonly requests from lessors. This way, lessees need not have to physically travel for every space they are interested at. *Zipmatch* lately launched a new service that allows users to experience virtual reality tours of the units and properties to further enhance users decision-making process.

With the exception of *MyProperty.ph*, *Zipmatch* and *Spaceal* have ratings and reputation system embedded in their platforms. This have been hailed as an essential feature of the platforms.

6.2.6 Logistics

Platform	Sub-sector	Name	Position
Mober	Local Delivery	Dennis Ng	Founder and CEO
Etobee Philippines	Local Delivery	Armon de la Cruz	Business Development Manager

For the logistics sector, the changes are not so revolutionary that it will likely cause a major disruption in the industry. What all platforms offer is a peer-to-peer delivery of goods that is more efficient, more reliable, faster and cheaper. All of the platforms utilise motor bicycles as the mode of transportation, with the exception of *Mober* as the only platform that delivers using vans. All are on-demand and promises on time and same day delivery. Despite being on-demand, *Mober* and *Etobee* try to incorporate route-maximization where there are several drop-off points for the deliveries.

Most acknowledge that the growth of e-commerce in the Philippines would make their services more in demand. *Etobee* specifically focuses on this market. There is also an observed growth in SMEs and startups that *Mober* and *GrabExpress* seek to supply. *Mober* uniquely caters to big companies because of the type of vehicle they utilise (i.e. vans). While *Etobee* also offers cargo deliveries, they are currently focusing on the acquisition of more motorcycle fleets first. Nevertheless, all platforms provide delivery services to individuals as well.

While *GrabExpress* and *Etobee* provide incentives to their driver partners, this is not the case for *Mober*. In fact, *Mober* is very explicit to its partner drivers that they cannot provide those benefits to them. This is in line with their goal of making sure that their driver partners understand that *Mober* is suppose to simply supplement their income but it cannot guarantee that participation can be a person's sole-source income. This further reflects Mober's policy of only accepting those who truly understand this model.

It is worth noting that both *Etobee* and *GrabExpress* originate from Indonesia and Malaysia, respectively, where motorcycle usage is high. *Mober* and *BikerX* are Filipino-owned businesses with *Mober* acknowledging that its business model took inspiration from *GoGoVan*, a startup from Hong Kong. It is expected that more international or regional players will come in such as *Deliveree* from Thailand.

Due to the nature of the business, all practice an online and physical screening process. Requirements such as driver's license, vehicle registration and insurance, and police clearance are basic requirements. *Mober* even requires their drivers to attend their training seminars before they can participate in the platform. Packages being delivered are all insured and rating systems are similarly in place.

6.2.7 Food

Platform	Sub-sector	Name	Position
Plato	Shared Food	Laurence Espiritu	Founder
Good Meal Hunting	Shared Food	Gear Fajardo	Founder and CEO

In food sharing, food is simply the materialization of cook's desire to share his or her skills and passion. *Plato*, describing itself as the *Airbnb* for food, provides professional chefs a venue to showcase and serve dishes that are not normally offered in their restaurants, giving them a break from the routinary dishes that they would normally cook. *Plato* claims to help unlock the creativity that restaurant menu limit chefs. Aspiring chefs and homecooks are equally very much welcomed to participate. As it is also in the case of *Good Meal Hunting*, these food sharing platforms give professionals and amateurs the opportunity to practice and enhance their cooking skills and talents. It becomes a venue where they can make a name for themselves. Hence, it is unsurprising that both food sharing platforms are designed to empower cooks and transition their hobby or passion into a business of its own and transform

them into entrepreneurs themselves. Both platforms provide guidance, training and tools to help cooks build their own self-sustaining business, develop their ideas, and/or test their cuisine. In *Good Meal Hunting*, for example, mothers and housewives, which represent around 80% of their homecooks, are being empowered to become microentrepreneurs capable of contributing to the family's income and still properly care for their children.

As users and government regulations regard food quality and safety as highly important, these platforms have in place stringent standards for food safety and quality. *Plato* currently targets professional chefs so they can set the standard. A team from *Plato* checks food quality and safety measures to assess their homecooks. On the other hand, *Good Meal Hunting* undergo their homecooks to food safety training. For both, a rating system is in place to also help maintain quality. In line with this, direct interaction of the cooks with the users are considered a core component of the platforms; beyond the food, the conversation breaks the lack of interaction experienced in restaurants between cooks and customers. It is the direct and unique experience that justifies the limited number of diners that can participate at a given food sharing event. Both platforms pride themselves of giving users a more authentic food experience.

Despite the high regard for food quality, both platforms are highly inclusive and sensitive to the needs of the underserved market. No one is required to be professional chef to join the platform; from amateurs, to those who received some culinary training to professional chefs are welcomed. For *Plato*, cooks without space can cook in someone else's home or participate in their events. In terms of variety of food options, *Good Meal Hunting* offers healthy options, vegan and halal food, which are not commonly served in restaurants.

6.2.8 Learning

Platform	Sub-sector	Name	Position
Khawna	Instructor-led	Gian Javelona	CEO, OrangeApps

The education sector is falling behind in terms of examples and diversity in the sharing economy. *Khawna*, an instructor-led sharing platform, was launched in 2014 but has now ceased operations. *Khawna* was developed to fill the innovator's gap in the educator sector while also providing Filipinos the chance to develop skills, particularly those but not limited to STEM (science, technology, engineering and mathematics) and entrepreneurship skills sets, that will help them get high-paying jobs. Interestingly, Mr. Gian Javelona, CEO and Founder of *OrangeApps*, the company behind *Khawna*, does not consider themselves, nor the likes of *Coursera* and *Khan Academy* as part of the sharing economy.

According Mr. Javelona, *Khawna* has partly failed because the existing consumer behavior was not ready to accept a new way of learning. The mindset that learning occurs most effectively within the confines of bricks and mortar schools is still highly prevalent. This inertia, which is also brought about by senior educators, prevented radical changes in the current educational system. In addition, infrastructure-wise, because of the poor Internet connectivity and penetration in the Philippines, a virtual-based education is not yet ripe for the country. Mr. Javelona further speculates that the sharing economy in the educational sector cannot be confined within a geographical scope. A more global audience is ideal since it would maximise learning by providing opportunities to expand social interaction beyond geographical borders, diversity in topics, and depth of discussion.

The proceeding chapters further analyse the findings from this research using two analytical frameworks.

7 Analysis: Sustainability Claims of the Sharing Economy in Metro Manila

This Chapter seeks to answer the research question:

> *RQ#1*: How do sharing economy platforms in Metro Manila compare to the Global North in terms of its sustainability claims?

Hence, the first section is the analysis of the sustainability claims of the sharing economy in Metro Manila. These are then contrasted to the Global North discourse that was derived from the literature analysis (Chapter 2.3) using a comparative table. To complement this, the core framing tasks are used to further assess the sustainability potentials in light of the sharing economy's collective identity in articulating the problems, solutions to the problems, and motivational rationale for potential adherents. This advances the discussion from identifying the sustainability claims into determining *if* platform developers indeed position the sharing economy to contribute to sustainability.

7.1 Sustainability Claims of the Sharing Economy in Metro Manila

Sustainability is value-laden and relative to the context it is being applied to and the people who are involved or affected by it (Tainter, 2003). With this in mind and despite globalization, it is highly probable that the difference between the sustainability discourses of the sharing economy in the Global North differ from that of the Global South. To start with, this North-South divide is a socio-economic and political international class grouping that generally distinguishes the affluent and powerful countries from those countries that are still developing. Hence, the economic persuasive appeal of the sharing economy is presumably greater than the social and environmental arguments in the context of the Philippines. This section investigates how the various sharing economy platforms in Metro Manila relate to economic sustainability, social sustainability and environmental sustainability.

7.1.1 Economic Sustainability

Claim #1: The sharing economy increases economic activity and provides new economic opportunities.
As discussed in Chapter 2, the sharing economy gathered force during a time of financial turmoil in the Global North. Hence, it unsurprising that in literature, the economic sustainability angle is the most discussed; the sharing economy is hailed to help increase economic activities in terms of generating new businesses, additional sources of income, and cheaper alternatives to products and services in order to help boost a country's economic performance. Likewise, the economic sustainability positioning is the strongest in Metro Manila. Since basic needs and services such as efficient public transportation and employment opportunities are far from being sufficiently met, economic sustainability for a developing country like the Philippines is not only desired but more so, necessary.

While none of the interviewees explicitly framed their sharing economy platform as one that increases economic activity and provides new economic opportunities, particularly in the context of directly and purposely intending to contribute to the country's economic growth, it can be inferred that their platforms do so. Sharing economy platforms in Metro Manila create jobs and/or alternative sources of (additional) income and provide more affordable products and services (see further discussion below). Moreover, in itself, new businesses necessarily imply an increase in economic activity.

Thus far, unlike claims made in the Global North, there are no documented cases of business closure due to the sharing economy. However, taxi associations have protested against the unfair competition that ride-sharing and ride-hailing platforms have made; they complained that *Uber* and the likes are not subjected to the same regulation and policies that taxi operators and car rental companies are required to abide by (Cupin, 2014). Hence, in May 2015, the Philippine government promulgated a new regulation for ride-sharing and ride-hailing platforms, which the government calls as Transport Network Companies (TNCs). A TNC is "organisation that provides pre-arranged transportation services for compensation using an internet-based technology application or a digital platform technology to connect passengers with drivers using their personal vehicles. TNCs will provide the public with online-enabled transportation services known as a TNVS [Transport Network Vehicle Service], which will connect drivers with ride-seekers through an app" (DOTC, 2015). The regulation specifies that in order for a vehicle to be an eligible TNVS, it should pass certain requirements such as the vehicle (a) must not be more than 7 years old, (b) must be a sedan, Asian utility vehicle, sports utility vehicle or other similar vehicular type, and (c) must have an global positioning system and navigation devices. TNCs are also required to screen drivers to promote passenger safety. *Uber* welcomed this move saying, "The Philippines has officially become the first country to create a national dedicated framework for ridesharing. This first-of-its-kind order is a shining example of how collaboration between government and industry can advance urban mobility, create new economic opportunity and put rider safety first" (Uber, 2015). The Philippine government clarified that this move is not to favor the new players but rather "to motivate the public utility vehicle operators to modernize, upgrade, and innovate their services for the benefit of the public" (DOTC, 2015). Aside from the transportation sector, no other sector or industry is opposing sharing economy platforms on the basis of unfair competition.

Claim #2: The sharing economy is an alternative source of income/funding.
Among the contentious issues that divide the supporter from the skeptical is the extent of how the sharing economy can maintain a steady and reliable source of income for people. Thus, nuancing what "alternative" means in this context is critical to help resolve this particular issue. The people interviewed in this study are aware of this critique, hence are able to properly articulate what their platforms advocate. The incentive of *extra* income for service providers is particularly promoted in the transportation, services, logistics, goods and food sectors. There is a general recognition among the interviewees that the sharing economy alone cannot sustain a person's income in the long run; it is an ambitious claim that would set high levels of expectations for relatively new startups like theirs. Similarly, for the money sector, the sharing economy is also seen as an alternative source of funding. *The Spark Project* and *Cropital* were developed in response to the lack of financial options to support businesses, microentrepreneurs, artists and farmers. Hence, for the sharing economy in Metro Manila, "alternative" refers to *additional* source of income/funding and not as a complete substitute.

Claim #3: The sharing economy facilitates microentrepreneurship.
Wosskow (2014) suggested that the sharing economy "have the potential to turn the UK public into a nation of microentrepreneurs" by utilising and profiting from existing assets and skills. By saying that the sharing economy could be a "route to self-employment" would imply that it could be a stable source of income. This claim, however, is only shared by a few: transportation (i.e. *Beep a Ride*), service (i.e. *Freelancer.com*) and food (i.e. *Plato* and *Good Meal Hunting*) sectors. For instance, microentrepreneurship is particularly relevant and encouraged in *Good Meal Hunting* where the ultimate goal of the platform is to enable the transition of homecooks into empowered microentrepreneurs. In a different manner, for the space sector, particularly for coworking spaces, it facilitates microentrepreneurship in such a way that it provides entrepreneurs a space to meet and collaborate with like-minded people.

Claim #4: The sharing economy offers more efficient and cheaper products and services.
On the other hand, consumers or those at the receiving end of the products and services are promised of cheaper alternatives without compromising the quality of the products and services. Through the help of technology, affordability and quality are enhanced by better efficiency, reliability and convenience for its users compared to existing options. Platforms belonging to the transportation, logistics and food sectors unanimously subscribe to this claim. On the other hand, products sold in the good sector are not always cheaper since they also sell new products (not second-hand or pre-owned items), and services provided through *Freelancer.com* are not always more affordable than hiring employees since users also provide high-quality professional services.

Claim #5: The sharing economy proactively helps improve the skills and talents of users.
With regard to labour conditions, though these are not yet raised as a concern, some of the sharing economy initiatives in Metro Manila, particularly in the business services sub-sector, are proactively incorporating healthcare services for its service providers. For example, service providers enrolled in *Raket.ph* may receive free health coverage or avail of it for a small fee (Raket.ph, 2015).

The sharing economy platforms also go beyond simply facilitating connections between users and getting the work done. A number of the platforms, particularly in the services and food sectors, are actively promoting the advancement of its users' skills and talents. *Freelancer.com* offers skills improvement workshops and trainings; *Tralulu* shares best practices among local tour guides; *Plato* provides guidance and tools to develop food and menu ideas; and *Good Meal Hunting* assists business permit registrations, marketing and advertising, packaging assistance and photography services. These initiatives indicate that the quality of its services and those who provide those services are regarded as important. This proactive support from the sharing economy platform developers appears to be a unique feature of the sharing economy in Metro Manila.

7.1.2 Social Sustainability

Claim #6: The sharing economy encourages increased social connections by creating a sense of trust and/or community belongingness in the platforms.
The social significance of this new economy stems from the mere use of the term "sharing", which implies a highly social activity. However, this is not the case in Metro Manila. One possible explanation is because the term "sharing economy" or "collaborative consumption" is not yet commonly used, even by the platforms themselves. Nonetheless, the *idea* of peer-to-peer transactions is widely adopted and known. In the context of Metro Manila, the "increased" social connections are highly superficial where people get to interact with strangers for a very brief period and temporary enough that it would not result to long-term relationships between peers nor to establishing trust.

According to the interviewees, the social sustainability aspect is not considered highly important as long as it provides the basic service it is expected to deliver. Interestingly, all those with strong social sustainability positioning such as *Tripda, Tripid, Ridefind, Magpalitan, ReShop.ph* and *Rentipid* have ceased operations. This is in line with the Schor et al. (2015) findings for the Global North that platforms that remain adherent to their sharing ethos have failed to sustain a good deal of trading activity and robust participation. In the opinion of an *Uber Manila* representative, while it would be good to have the social dimension of ride-sharing in *uberHOP* more prominent, the main reason why people are using the platform is because of the efficiency, convenience and affordability of the service, not necessarily to make new friends. Nonetheless, it is a welcomed bonus effect. Similarly, according to some of the

Uber and *Grab* drivers who the author rode with, passengers rarely talk or engage in personal conversations with them. While they are hopeful that there will be more personal interactions, it does not discourage them since the primary reason why they are participating in the platform is to earn. This argument is applicable to almost all on-demand sharing economy platforms particularly in the transportation and logistics sector. Based from the author's observation, all on-demand services are characterised by quick and automated services that do not require prolonged social interactions.

It is only in the coworking spaces where deep social connections could b developed. Being the second home of entrepreneurs and independent professionals, coworking spaces, according to the interviewees, were designed to be more inviting and relaxed compared to office spaces and to facilitate collaboration among users. It was noticeable how managers of the coworking spaces are actively engaging with the people and facilitating connections among them. However, as Mr. Berta of *Flyspaces* observed, the Asian coworking spaces are quieter and have minimal interaction in comparison to those of its kind in Europe and the US.

Furthermore, as it has been cited in the Global North, the rating and reputation system was established to build trust and facilitate more informed decisions. Yet this same feature has also limited social interactions (Schor, 2014). Mr. David of *OLX Philippines* noticed that new users or users without ratings tend to be prejudiced against because of the lack of people vouching for them. Interestingly, according to Mr. Sheker of *Sulit.ph*, not many users make use of the rating and reputation system. This is also why *Freelancer.com* holds workshops on (image) branding in order for freelancers to get more clients and avoid being easily discriminated. Alternatively, it could be argued that it is not necessarily about discrimination or limited social interactions but rather the sharing economy facilitates targeted interactions. For example, in the business services sector, clients do not have to contact all artists but can rather target their potential freelancer based on his or her history of works and feedbacks from previous clients. To add, unlike in the Global North where "trust" is assumed to be developed by the ratings and reputation system, this is not the case for Metro Manila. This will be further discussed in Claim #9.

Claim #7: The sharing economy increases access of resources to all social classes.
In literature, the sharing economy in the Global North is characterised as being democratic, inclusive and open. Generally, the same philosophy is applied by the sharing economy platforms in Metro Manila. This is manifested in the (a) diversity of products and services, (b) user's socio-economic profiles, (c) price, (d) payment methods, and (e) online and offline alternatives. Platform developers recognise that their products and services must be diverse enough to capture the needs and meet the financial capacity of its users. For example, *Uber* and *Grab* has at least three options that range from motor bicycles, taxis, ordinary cars to luxury cars, while *Good Meal Hunting* has international comfort food, healthy options, vegan and halal options. Many of these options have not been widely offered before, opening a market for the sharing economy platforms.

According to most of the interviewees, while the platforms can be used by anyone, there appears to be a strong participation from people ages 18 to 34, a trend that is similarly observed by Chiang (2015) among Canadian sharing economy users. However, unlike the Canadian participants who he characterised as affluent, the interviewees claim that their users are students and young professionals, across almost all social classes. Understandably, people belonging to the lower-most socio-economic class are unable to participate, as this would require mobile phone and Internet connectivity at the very least. One sharing platform that is led by the government, a bike sharing program, is perhaps the only offline sharing platform that specifically caters to the lower-most socio-economic class. Still, sharing economy

platform developers continue to make the prices of the products and services cheaper than current options. In terms of gender, there is a trend that participants in the goods and food sectors are mostly women. Majority of the sellers and homecooks in *OLX Philippines* and *Good Meal Hunting* are women. According to Mr. David of *OLX Philippines*, this is possibly the case because mothers and wives are the family's gatekeepers who determine what can be sold or not. At the same time, Ms. Fajardo of *Good Meal Hunting* pointed out that their platform gives housewives an opportunity to contribute to the income of the family. In line with this, there are some attempts to even provide people with physical disabilities opportunities to earn. For example, *Uber* gladly accepts deaf and mute drivers.

Platform developers also recognise that payment methods are a hindrance to participation. While most of the sharing economy platforms in the Global North rely heavily on credit card payment, the credit card penetration in the Philippines is below 10% or approximately 5 to 7 million Filipinos of the current 100 million population (Galolo, 2015). Hence, platform developers are actively seeking alternative payment methods such as cash upon delivery, bank deposits or payments via over-the-counter shops. For example, Metro Manila is the second Southeast Asian city and fifth country in the world (after Hyderabad, Nairobi, Jeddah, Saudi Arabia, Hanoi and Ho Chi Minh City) where *Uber* launched cash payments in order to "best meet the needs of Filipino riders…[and open up] the *Uber* platform to more people" (Dela Paz, 2015).

Some platforms extend their initially app-based sharing platforms to browser/desktop alternatives to cater to users who do not have mobile phones. Or, as another attempt to extend the market of the platforms, *Grab*, for example, has physical stations or kiosks in malls and airports where people without smartphones or Internet services can book a ride through the help of *Grab* representatives. Overall, however, while all these attempts are made to make the sharing economy more democratic, inclusive and open, ultimately this simply means getting a bigger market and profit for the platform developers, as opposed to directing it towards creating more genuine social connections.

Claim #8: The sharing economy empowers users (i) financially, (ii) by giving access to opportunities to explore their talents and skills, and/or (iii) by having an active role in the development of the platforms.
Among the strongest messages of the sharing economy in Metro Manila in relation to social sustainability is its contribution to empowerment, a claim not commonly discussed in the Global North. First, the sharing economy provides financial empowerment by enabling people to earn extra income from underutilized time or resources. Although it can be argued that an increase in people's purchasing power may result to an environmental backlash due to more consumption, generally, the sharing economy is likely to help those who are in need of extra income to satisfy their basic needs. Second, the sharing economy provides people a venue to pursue their passion and further develop their skills and talents as seen in the services and food sectors. On a similar note, because of the promised efficiency, it allows people to use their productive time better. Third, the sharing economy is shaped and steered primarily by the users themselves through the feedback and rating system; it allows users to have more informed decisions with the products and services they can utilise. It is also user-governed in as sense that the data analytics gathered by the system provide the platform developers information as to how to enhance their system and services.

Claim #9: The sharing economy provides security and minimises risks.
The discourse on the sharing economy creating a sense of "trust" in the platform has to be nuanced against security. While almost all of the platforms utilise rating and reputation systems, it does not necessarily translate to trust since trust implies a more personal connection. It also begs the question as to whom trust is given to, is it to the platform or the

service providers? In Metro Manila, trust cannot simply be earned by feedbacks and reviews. Given the limited real social interaction that happens within the platform, higher importance is given to safety and security, which are more basic than trust. Hence, the rating and reputation systems are more related to risk mitigation and management measures. As Ms. Bernal of *Kickstart Ventures* speculates, among the reasons why *Tripid* could have failed is because it was not able to address security issues. In the case of *Zipmatch*, the transparency of the feedback and rating systems are not necessarily to establish trust but more so to help "professionalize" the industry of brokers and homeowner who seek to rent out their homes.

Claim #10: The sharing economy has social advocacies at the core of its business.
Lastly, it also worth noting that some of the platforms are, at the core of its business, socially-oriented. This was not seen in any of the Global North literature. For instance, *Cropital* aims to help disadvantageous farmers; *The Spark Project* supports socially relevant projects; and *Gift Launcher* and *TeeTalks.ph* support advocacy causes.

7.1.3 Environmental Sustainability

Claim #11: The sharing economy optimises idle and underutilised assets and resources.
The environmental sustainability dimension is the weakest across all sectors. As it is the case in the social sustainability dimension, platforms with a strong focus on collaborative consumption and environmental protection such as *Tripid*, *Magpalitan*, *Rentipid* and *ReShop.ph* did not succeed in maintaining a momentum and were forced to shut down. While many relate to the concept of maximising underutilized assets, beyond this, there is limited to no true environmental sustainability measures adopted as part of the core business model. For *OLX Philippines*, despite the environment being part of the identified four winners in all transactions (i.e. seller, buyer, community and earth), Mr. David of *OLX Philippines* says that the idea of saving the environment by participating in the platform will not appeal to the Filipino people. In fact, there is a general consensus among the interviewees that the environment is a hard sell; it simply does not resonate to the needs and wants of the platform users. It is viewed as a noble positioning but not practical, especially in the case of the Philippines where people generally seek to satisfy their basic needs first; and the environment is seen a premium or a value that only the rich and privileged can subscribe to. Furthermore, for platforms such as *Spaceal*, its market is not fit to solve environmental problems ("people-solution match"); the problem they aim to address is to simply facilitate renting a space as quickly and as conveniently as possible. It is *Spaceal's* view that they have done a lot to change people's behavior but incorporating the environment is another task that relates not just to changing people's behavior, but also their beliefs. As such, it is considered that highlighting the environmental aspects would appear "non-authentic".

Claim #12: The sharing economy limits the extraction of natural resources and production of goods and decreases waste generation.
Only one sharing economy platform explicitly connected their business to natural resource extraction. *OLX Philippines* said, "Likewise, buying quality pre-loved items…even contributes to reducing consumption of raw materials and extending an item's value" (Ferraz, 2015b). Other than them, this claim, which is rather an indirect effect of the sharing economy, is also difficult to prove.

Claim #13: The sharing economy is aware and welcomes the positive externalities generated by the platform.
Nonetheless, all the sharing economy platforms, especially the goods, spaces, transportation and logistics welcome the environment as a *by-product* or a *positive externality* of their business and operations. Furthermore, despite the lack of environmental sustainability in the core business model, there are some notable environmental programs. For example, *Good Meal*

Hunting aims to deliver within a two-kilometer radius to reduce the food mileage once they have gathered a larger number of homecooks. It also aims to use environmentally friendly packaging and/or a deposit system for the meal packs. Ms. Fajardo of *Good Meal Hunting* believes that pre-ordered meals also help reduce food waste. *Cropital*, a crowdfunding platform that support farmers, acknowledges how closely linked their work is to the environment. While they do not impose sound environmental practices to their farmers, they are aware that they can influence the operations and farming style. Hence, they adopted an assessment guideline from the World Bank for evaluating their farmer applications that incorporates a criterion for doing agricultural and rural work. It includes the quantification and measurement of environmental impact in order to minimise the negative impacts, risk and mitigate it. However, this is not a mandatory component because they are aware that it can be expensive to incorporated environmental practices in farming (R. Amparo, personal communication, April 1, 2016).

Overall, the sustainability potentials claimed by sharing economy platforms in Metro Manila have a number of similarities and difference with that of the Global North. Economic sustainability and social sustainability are strongly used by the sharing economy platform developers in Metro Manila with a weak level of adoption and consensus when it comes to the environmental dimension. As Table 4 shows, nearly all of the sustainability claims from the Global North are adopted to a certain extent by some platforms. Some completely and unanimously, while some are outside the purview of the sharing economy actors in Metro Manila. Furthermore, what this section illustrates is that the level of adoption to a claim greatly differs by sector; the sustainability potentials claimed by actors are contingent upon the sector it belongs to. While more difference can be seen if the unit of analysis is not sectoral, this exercise simply confirms that generalisations should be avoided; a claim for one sector cannot represent the entire sharing economy. Table 5 further illustrates the divided views even within a sector. The analysis in this section also implies that, if need be, government regulation could be approached by sector as opposed to a blanket policy for all sectors.

Moreover, new or more nuanced claims emerged in this study (i.e. Claims #5, 8, 9, 10, 13). Certain claims from the Global North are not completely transmittable or adaptable to the Global South. For instance, interviewees felt that need to distinguish trust from security. As discussed earlier, trust requires a deeper social interaction as opposed to quick transactions that only requires a basic sense of security.

Table 4. Comparison of sustainability claims of the sharing economy in Metro Manila with the Global North

		Transportation (n=4)	Services (n=2)	Money (n=2)	Goods (n=2)	Space (n=10)	Logistics (n=2)	Food (n=2)	Learning (n=1)
ECONOMIC									
1	The sharing economy increases economic activity and provides new economic opportunities.								
2	The sharing economy is an alternative source of income/funding.	✓	✓	✓	✓		✓	✓	
3	The sharing economy facilitates microentreprenurship.		~			~		✓	
4	The sharing economy offers more efficient and cheaper products and services.	✓	~		~	*	✓	✓	
5+	The sharing economy proactively helps improve the skills and talents of users.		✓					✓	✓
SOCIAL									
6	The sharing economy encourages increased social connection by creating a sense of trust and/or community belongingness in the platforms.	*		✓		*		✓	
7	The sharing economy increases access of resources to all social classes.	✓	✓	✓	✓	✓	✓	✓	✓
8+	The sharing economy empowers users (i) financially, (ii) by giving access to opportunities to explore their talents and skills, and/or (iii) by having an active role in the development of the platforms.		✓	✓				✓	
9+	The sharing economy provides security and minimises risks.	~	✓	✓	~	~	✓	✓	
10+	The sharing economy has social advocacies at the core of its business.			✓					
ENVIRONMENTAL									
11	The sharing economy optimises idle and underutilised assets and resources.	✓	~		✓	*	✓		
12	The sharing economy limits the extraction of natural resources and production of goods and decreases waste generation.					~			
13+	The sharing economy is aware and welcomes the positive externalities caused by the platform.	~	✓		✓	~	✓	~	✓

Legends: + = new additional sustainability claim;   * = weak adoption (less than half);   ~ = partial adoption (half or more than half);

✓ = complete adoption (all)

Table 5. Level of consensus among platforms within sectors in relation to a sustainability pillar

Sector	Economic	Social	Environmental
Transportation	Unified	High varies	Varies
Services	Varies	Unified	Varies
Money	Unified	Unified	Varies
Goods	Varies	Varies	Unified
Space	Highly varies	High varies	Highly varies
Logistics	Unified	Unified	Unified
Food	Unified	Unified	Varies

Notes:
-How to read this table: For example, for the transportation sector, all 4 platforms interviewed are in consensus with the economic claims it associates with ("unified"). However, for the social claims, there were a lot of disagreements or lack of consensus between the 4 transportation platforms ("high varies"). Less disagreement is seen in the environmental claim ("varies").
-This method is not applicable for the learning sector due limited sample.

7.2 Core Framing Tasks

In this section, the core framing tasks summarise the positioning of the sharing economy in Metro Manila with regard to its *collective* effort in identifying the problems it aims to solve; how the platforms plan to proceed with the solution; and what are the compelling reasons to capture people's attention and support in participating in this new economy (Table 6).

Table 6. Core framing tasks and sustainability claims arranged according to sector

SECTOR	DIAGNOSTIC	PROGNOSTIC	MOTIVATIONAL
Transportation			
Transportation Service *Uber, Grab, U-hop, BikerX*	Worsening traffic congestion, loss of productive time	Technologically enabled ride-hailing and ride-sharing services with safety measures	Overall: minimise car on the road, more transportation options for commuters
~~Ridefind, Tripda, Tripid~~	Inefficient public transportation	Collaborative consumption of economic/vehicle resources	For passengers: convenience, affordability, more productivity, safer
	Over-regulated transportation companies leading to (social/work) injustices	Maximising underutilized vehicles	For drivers: shared driving cost, and/or extra income
		Diversification of services to cater to all socio-economic classes	For both: meeting strangers/more fun commuting experience
Loaner Vehicle *Beep a Ride*	Underserved car-owners	Simpler rental process, fair and transparent pricing	For users/ passengers: convenience, cheaper and safer
			For car owners: extra income to full-time work
Services			
Personal Services *HeyKuya*	Lost of time doing menial tasks	A reliable SMS-generated personal assistant service (conversational commerce) that links you to the proper service providers	To make the Philippines a more productive nation
Personal/Business Services *Gavin*	Lack of access to service providers	A platform that links you to the top five best fit for the work that needs to get done	For customers/clients: more options mean better and informed decisions
			For service providers: more customers,

SECTOR	DIAGNOSTIC	PROGNOSTIC	MOTIVATIONAL
			extra/stable source of income
Personal Services *Tralulu*	Lack of authentic travel experience caused by language barrier, navigation problems and security issues	Links travelers with local guides to develop tailor-made travel itinerary together	Travelers: more authentic travel experience Local guide: extra income
Business Services *Freelancer.com, Raket.ph, PortfolioMNL*	Prevalent unemployment and underemployment, especially among the youth, with some forced to work abroad Misfit/mismatch of work with skills, talents and passion Lack of opportunity for freelancers Lack of network to help connect service providers with client and vice versa Insufficient salary	Platforms that efficiently bridges professional service providers with clients; service providers can showcase their skills and talents while clients can call for specified services, or the other way around Review and feedback systems as tool to build better reputation Training and workshops to help improve skills of Filipinos	Service provider: extra/stable-source of income, improved skills and talents, follow their dreams, empowered Filipinos, globally competitive Filipinos To equalize the playing field where people are not discriminated by their resume but by the quality of their work Clients: cheaper labour (at more agreeable rates), easier way to hire
Money			
Crowdfunding *Cropital, The Spark Project, Teetalks.ph,* ~~*Artistconnect*~~ Loaning *Microbnk*	Lack of financial support and access thereof to individuals, entrepreneurs, marginalized innovators, projects, advocacies and causes	Democratizing financial support through linking peers, while incorporating transparency and risk management procedures to ensure proper returns to supporters Building a community of likeminded people	Overall: linking likeminded people Filipinos are generous to ideas they resonate with For those being funded: improved or more stable income, more empowered Testing of product For funders/ supporters: contribution to likeminded people or projects that they resonate with, fair interest/returns/rewards
Crowdfunding *Giftlauncher*	Mismatch of what the receiver wants and what is given	A platform where the receiver specifies what kind of gift he or she wants and friends or families can pitch in to the targeted amount needed	More efficient purchase of resources For receivers: getting the gift they truly want
Goods			
Pre-owned *OLX, Sulit.ph* ~~*Magpalitan, Reshop.ph*~~ Loaning ~~*Rentipid*~~	Abundance of unused pre-owned items	Online platform for buying and selling goods ("re-commerce") Maximise underutilized and unused resources; Reduce, reuse, recycle	For both: improve people's lives through win-win exchanges For buyers: affordable goods For sellers: declutter homes, earn extra cash
Logistics			
Delivery *Mober, EtoBee, GrabExpress, BikerX*	Traditional courier and delivery services are expensive and requires at least a day to deliver Growing e-commerce industry in the Philippines would require more efficient services	Delivery of packages that is more efficient, flexible, faster and cheaper through technology enabled platforms, secured through insurance and screening processes for the drivers Maximising underutilized vehicles so as not to add to traffic	For customers: reliability, convenience For drivers: extra income
Space			
Workspace *Flyspaces*	Costly rental fees for entrepreneurs, startups and independent professionals	A marketplace that offers a range of workplace solutions	More empowered entrepreneurs, startups and independent professionals
Personal space *Spaceal, Zipmatch, Myproperty.ph*	City development, urbanization and increasing population causing rising living costs Incomplete information on properties	Connects lessors and lessees by curating all relevant information to guide selection process	Lessees: more empowered Lessors: more clients

SECTOR	DIAGNOSTIC	PROGNOSTIC	MOTIVATIONAL
Makerspaces *Makerspace Pilpinas*	?	A space where people can find and create solutions to their problems using science, technology, engineering, art and math (STEAM)	Empowered Filipinos
Food			
Shared Food *Plato, Good Meal Hunting*	Creativity and passion of chefs, aspiring chefs and homecooks are constrained Undervalued skills and talents Lack of authenticity in food	A platform that empowers chefs, aspiring cooks and homecooks by providing them a venue where they can showcase their talents and engage with their guests and customers	For guests and customers: more authentic dining and food experience; offers a diverse set of food options (e.g. vegan, vegetarian, halal) For cooks: Earn extra income and transition towards their own business; helps women and housewives
Learning			
Instructor-led ~~Khanna~~	Unemployment Low employability (mismatch of what is being taught from what is needed by the market)	Instructor-led online learning platform that offers STEM and enterprise related knowledge and skills	Higher employability chances, self-employment, more empowered Filipino workers

Coding: Strikeout = inactive or not operational; Color coding: Blue = Economic claims; Orange = Social claims; Green = Environmental claims

7.2.1 Diagnostic Framing

The identification of the problem to be addressed or solved is assumed to be among the first and basic tasks that businesses are supposed to undertake. The problems identified would limit the scope and extent of the probable reasonable solutions that the business can design. However, in the course of the interviews, several of the interviewees were not able to clearly define the problems their platforms seek to solve. Instead, many immediately jump into describing the solution they are proposing. Ms. Bernal of *Kickstart Ventures*, an innovations and incubator hub, noticed that many startups indeed find it difficult to clearly identify the problems which their product or service aims to solve; the process becomes "a solution seeking for a problem" (P. Bernal, personal communication, March 29, 2016). On the other hand, Mr. Belen of *Brainsparks*, says that some simply need guidance in articulating the problem better. Hence, in developing Table 6, some of the diagnostics framings were derived through inference from the interviews, websites or news articles.

Although it is not necessary to get to the root cause of the problem in order to successfully challenge the existing *status quo*, literature suggests that the broadness the problems identified and its alignment to other issues make it easier to garner support from more potential adherents (Snow & Benford, 1988). A number of the diagnostic framings of the sharing economy platforms are broad in scope and are aligned with important socio-economic issues to Metro Manila citizens. Examples of these are, inefficient public transportation, prevalent unemployment and underemployment, lack of financial support, urbanization and population growth. However, some of the problematizations are also framed specifically, such as underserved car-owners, lack of authentic travel experience, and limited opportunities to express and improve creativity.

While injustice framings are commonly cited in social movements, this was rarely used as leverage by the platforms. With the exception of the social injustice in the private sector for taxi companies, none of the sharing economy platforms have directly framed the problem as injustice. Arguably, however, all problems could be related to injustice, yet in the interviews, this framing was not explicitly stated.

The attribution component also falls short. Determining who to blame or who is responsible for causing the problem they have identified is lacking. The government, being the institution expected to deliver basic needs and services, appears to be the agency that is to be blamed. However, since the government is unable to satisfy Metro Manila's basic needs, private sectors took on the role. Other services such as logistics, food, space, goods and money have diverse actors that could be identified as responsible for the problems. Arguably also, the problems in all sectors can be attributed to the interaction and dynamics of the many different actors in society. Alternatively, this lack of articulation as to who should be mainly or directly be held accountable to the problem could also be seen a strategic move. As it will be discussed later on, this could be a way to shield the sharing economy platforms from the selection pressures of existing regimes. Another explanation for refraining from antagonizing incumbent industries is because sharing economy platforms may actually be offering the same product or service, or are complementary to what these incumbent industries are offering. For example, sharing economy platforms in the logistics and food sectors partner with traditional logistics and restaurant establishments. Similarly, as Mr. Coser of *Tripda* explains, they are aware that ridesharing is not a silver bullet solution to the traffic congestion; nonetheless, they recognise that it is part of the solution (Ferraz, 2015a).

Interestingly, there are occurrences where the problems the platforms seek to address further compound the problem. This is particularly evident in the transportation sector where there is a cited increase in cars between 10 000 to 15 000 on the road brought about by ridesharing platforms *Grab* and *Uber* (Alba, 2015). Furthermore, while this is bringing extra cash to platform drivers and car owners, it has backfired to taxi drivers who are taking home less money because of the competition on the road. As previously discussed, taxi coalitions have issued statements demanding that these platforms are subjected to the same regulation that they are required to abide by.

7.2.2 Prognostic Framing

The purpose of the prognostic framing is to "not only to suggest solutions to the problem but also to identify strategies, tactics and targets" (Snow & Benford, 1988). As identified in the selection criteria, the sharing economy generally proposes four features: access over ownership, maximising underutilized assets and resources, facilitating peer-to-peer transactions, and enabled by Internet and mobile connectivity. Overall, the local sharing economy platforms available in Metro Manila adopt these prognostic framings, one way or another. The similarities of the solutions are common especially within sectors with only a few additional features used by other platforms.

In line with the inability to clearly state the problems and businesses jumping directly to the solutions, the sharing economy platforms appear to relate themselves better to the broader "innovations economy". Mr. Belen of *Brainsparks* cites that despite the rise of sharing economy platforms, their organisation does not consider the need to create a new category for the sharing economy as it will likely fall under their existing competency area (i.e. educational technology, software, hardware, social entrepreneurship and a catch all category). In April 2016, the Department of Trade and Industry (DTI) sponsored an event, of which the author attended, that gathered startups and businesses together to discuss the state and future of the innovations economy in the Philippines. Many of the sharing economy platforms attended this event as well which reflects that the sharing economy is being tackled under the umbrella of innovations. On the other hand, in a report developed by the startup community (*Philippine roadmap for digital startups: 2015 and beyond*, 2015), and facilitated by the Department of Science and Technology (DOST), the sharing economy is classified as a distinct subcategory under internet startups.

As another observation, Ms. Rondario of *Impact Hub* cites that Filipinos are fad-driven. It is likely that the sharing economy is an innovation fad that many of the startups are capitalizing on. In effect, she speculates that people are not solving problems but are more concerned with innovation for innovation sake or finding solutions to a problem that does not exist. The sharing economy is primarily seen as an economic opportunity where it makes good business sense for the platform innovators and entrepreneurs while enticing its users on the value of new sources of income and/or savings. Time will tell whether or not the solutions being proposed are creating systemic changes or not. For now, the sharing economy business model is gaining popularity among local startups.

7.2.3 Motivational Framing

Despite the sharing economy being a peer-to-peer transaction, blurring of roles between the consumer and the producer is not evident unlike the observation of B. Cohen & Muñoz (2015). There is still a distinct division between the two peers especially in terms of the motivational framings. Overall, as previously discussed, economic sustainability is the most prominent motivational factor, followed by social sustainability, and environmental sustainability being the least important. Specifically, there is an observable pattern in framing the solution which could all be related to economic sustainability: efficiency, convenience, security for transportation and logistics sectors; reliability and empowerment for services, learning, goods and food sectors; cheaper and security for spaces; and risk management and a sense of community of like-minded for the money sector.

However, sometimes the motivations do not resonate well with users. Particularly in the goods and food sectors where products and services can come very cheaply as many are imported from China, South Korea and Thailand. Not to mention that e-commerce and deal sites are making products and experiences more affordable. Hence, on the basis of cheaper options as a motivating factor, this may not always be an effective framing. Furthermore, as Mr. David of *OLX Philippines* argues, in order to motivate people to participate in sharing economy platforms, particularly in the goods sector, the value of the object or service being offered must be higher than the cost of the transaction itself. For instance, for items that are cheap, the transaction cost might be more expensive and would thereby defeat the benefit of trading online. Hence, for platforms like *ReShop.ph* where donations were encouraged, the economic cost of communicating and organising the meeting to donate the items might be higher than simply throwing the item or donating it to charity. It is possible that this could be a reason as to why the platform is currently inactive.

7.3 Summary and Implications of the Sustainability Claims

Metro Manila is confronted with socio-economic problems that necessitate innovative solutions that will help alleviate the situation. The sharing economy presents itself as a *complementary* or *alternative* solution that primarily addresses the economic woes of the people. The diagnostic and motivational framings are kept broad and diverse but are aligned to pressing problems that help entice many users. Furthermore, the economic opportunities are not limited to a few nor is it one-sided; it is beneficial to all users where people can earn extra income and save money.

Compared to products and services that existing regimes offer, the sharing economy claims to be more efficient, convenient and cheaper. It does so by connecting peers and maximising supposedly existing resources and spare time. People from all social classes are encouraged to participate; the sharing economic is inclusive, democratic and open. Partly because of this, two critical components that Filipinos are concerned with when engaging in sharing economy platforms are security and risk mitigation. However, these should not be equated to trust.

As the sharing economy continues to expand in Metro Manila, greater emphasis are given to services valued by skills and time as opposed to exchanges of actual goods. At a time when the service industry is the highest contributor to the GDP of Metro Manila, the impact of this growth is unknown in terms of tax payments and labour conditions. On a conceptual level, this finding may call for a more refined selection of terminology. For example, for services, the terms "gig economy" or "on-demand economy" may be more appropriate than "sharing economy". Here, we can turn to Rachel Botsman (2015) who attempted to distinguish and define concepts related to the sharing economy. According to her, *gig economy* refers to "Systems that break up a traditional company 'job' into individual 'gigs' that independent workers are paid to do for a defined time" while *on-demand economy* is "Systems that instantly match buyers and sellers to deliver goods and services immediately when people need them." These nuances may also be an alternative approach to crafting targeted regulatory responses.

In line with the shift towards sharing of services as opposed to goods, there is also speculations that the sharing economy might be replaced by more automated services (Belk, 2016; Rustrum, 2016). This might have severe sustainability implications especially considering that more and more of the sharing economy platforms hinge on human services. Although this is more likely to happen in the Global North first, it would be advantageous for the Global South to take on preemptive measures. This is particularly important to Global South countries, like the Philippines, whose economy heavily relies on the services sector.

The strong economic and social positioning, from diagnostic, prognostic and motivational framings, trumps the environmental sustainability dimension that the sharing economy could offer. The environmental dimensions are not inexistent; many platform developers are aware of the positive externality of the sharing economy to the environment. However, platform developers recognise that the environmental angles do not appeal users. Hence, it appears as if there is mutual exclusivity where high social and/or environmental ethoses have low user participation (and have ceased operations) while those with strong economic positioning and weak social and/or environmental advocacies have high user participation.

The sharing economy is avoiding direct and aggressive opposition to incumbent regimes. If the sharing economy is seen as part of the innovation economy or a current fad, and is not deliberately positioned as a sustainable alternative, then it might just be contributing to the problem. If this is the case, can the sharing economy really contribute to sustainability? Because, as observed, even in the Global North, despite its earlier conceptualization the environment is not a strong factor. If so, at what point does it gain consideration, significance, and ultimately, adoption in the Global South?

All the questions are important to be discussed. If the sharing economy is not contributing to sustainability, then it is imperative for actors to implement counteracting measures. It is timely to act on it as early as possible since the sharing economy is still in its infancy and at a malleable stage. Hence, in the following Chapter, the sustainable transitions framework is used to illustrate the current trajectory of the sharing economy and inform how its sustainability potentials could be enhanced.

8 Analysis: Sustainability Transitions of the Sharing Economy in Metro Manila

This Chapter seeks to answer the research question:

> *RQ#2*: How and in what direction is the sharing economy transitioning on its path to sustainability?

Hence, this section is an assessment of the transition pathways that the sharing economy might take given its current state and foreseeable next steps. This relates to the ability of the sharing economy if indeed it is and how it is disrupting the prevailing unsustainable socio-technical regimes it presumably seeks to challenge. This Chapter employs the sustainability transitions framework.

8.1 Shielding Processes

Path-breaking innovations may passively or actively develop shields as protection from selection pressures. Based on how the proponents are framing the sharing economy in Metro Manila, it appears to be combing both approaches with an inclination towards a more passive strategy. In the sustainability transitions literatures, utilisation of geographical areas usually pertain to passive shielding. In the case of the sharing economy, these are underserved markets. The problems that the sharing economy seeks to address are not unknown; existing industries and businesses, even government public services, have similarly identified these problems yet are not sufficiently providing effective solutions. Hence, how the sharing economy articulates the problem and amplifies its proposed solution is strategic: the sharing economy is addressing problems that no one is tackling *while* avoiding to challenge and antagonize existing industries. For example, many of the on-demand platforms such as *Uber*, *Grab*, *Mober*, *Etobee* and *BikerX* are tackling problems by providing consumers quick and reliable service when they need it. They are positioning themselves as providing an *alternative* and *complementary* to the current (limited) options; not explicitly stating that they aim to *substitute* existing industries, thereby avoiding direct opposition from existing industries. For example, *Mober* identified that many SMEs are having a difficult time in finding delivery vans and many resort to purchasing vans they will rarely use. So instead of framing it as the inability of current industries to provide suitable options (hence, the lack of attributional component*), Mober* found a specific market to target that no industry is currently serving. Similarly, the sharing economy platforms in the food and services sectors cater to people who are also not served by the incumbent industries thereby not positioning itself as a complete replacement or a direct competition.

What these sharing economy platforms highlight is the solution they present: facilitating the exchange of and maximising existing resources between users. In the end what the sharing economy can ultimately offer to participants are the immediate economic opportunities of the platform and the empowerment to all its users. This differentiation creates a passive shielding effect which could also explain while incumbent actors do not see sharing economy platforms as direct competitors with the exception of the transportation sector.

Also within the niche, there is not much competition since there appears to be the formation of sub-niches. For example, in the logistics sector, *Etobee* specifically focuses on the e-commerce market, *Mober* and *GrabExpress* on SMEs and startups, and Mober for big cargos. The same applies for the money sector where *Cropital* funds farmers, *Artisteconnect* supports Filipino artists particularly for music and film, *TeeTalk.ph* gathers fund for advocacy causes from selling shirts, and *GiftLauncher* aggregates money to buy gifts for people. *The Spark Project*

has a wider scope with projects ranging from art, music, and video; fashion and product design; travel and culture; food and beverage; science and technology; and community projects. As Mr. Dulay of *The Spark Project* says, "There is no direct competition. There is, in fact, coopetition. The goal is to enlarge the pie of actors and players." Even against international sharing platforms, there is differentiation. For example, *Plato* claims authenticity, which the international platform *EatWith* cannot assure. For *Raket.ph*, instead of people themselves applying for work, in the Philippines they claim that clients prefer to look for service providers hence the need for reviews, badges and portfolios (Ferraz, 2014).

In addition to passive shielding, the sharing economy is also partly actively shielding itself. First, the sharing economy proponents are working with the government in setting the regulations that would be agreeable to all parties. For example, despite the additional work that the new regulations on Transport Network Companies (discussed in Chapter 7) imposed on ride-sharing and ride-hailing platforms, this gives sharing economy platforms greater legitimacy. Additionally, because there are no current regulations that specifically apply to crowdfunding, there are attempts to engage with the government on creating new regulations that would at least officially recognise crowdfunding platforms as an alternative source of funding, making it easier for them register as businesses. Second, another form of active shielding is that some of the sharing economy platforms reside within mother firms and incubator hubs. Take for instance, *Spaceal* is a product of *BlastAsia*, a software development company. Resources are being allotted for further research and development. *Cropital* is supported by *Enterprise*, an innovation hub under the University of the Philippines, in partnership with the Department of Sciences and Technology. They benefit from temporary access to space, funding opportunities, etc.

Startups, like all the status of all the sharing economy platforms, are generally characterized by a great degree of experimentation and open innovation. Hence, it is not surprising that many are adventurous, risk-taking and not overly protective. Also, most of the startups occur outside the firm setting, which is why traditional forms of active shielding do not apply to the sharing economy platforms in Metro Manila. The next section on nurturing will discuss in detail as to what kind of internal developments sharing economy platforms are working on.

8.2 Nurturing Processes

As the shields are mobilized and established, the niche nurtures itself in order to enable innovations to develop. Schot & Geels (2008) distinguish three internal processes that can help innovations to successful emerge as a viable replacement to or transformative force to the dominant regime: (1) Expectations that are robust or shared by a number of actors, specific, and have higher quality in terms of substantiation of claims; (2) Social networks that are broad and diverse, and are committed to mobilizing resources; and (3) Ongoing learning processes that are geared towards accumulating facts and data (first-order learning), and understanding and developing the underlying beliefs and assumptions of systems through the interaction with regime players (second-order learning).

a. *Expectations*: The level of ambition and expected success of sharing economy platforms primarily rest on the current accomplishments of global players *Uber* and *Airbnb* that popularized the peer-to-peer concept. Many of the interviewees foresee that because of the momentum generated by international sharing economy platforms, Filipinos will be more familiar with the idea and will be more confident to participate in such activities. Almost all of the interviewees have expressed that they aspire to expand globally or at least in Southeast Asia. Furthermore, investors and partners are creating positive expectations about the future of the innovations economy to entrepreneurs, innovators and policy makers. However, because of the lack of leadership or an

institution that guides this expectation setting, there is no unified agenda or goal that brings all the sharing economy platform to a common destination.

b. *Social networks*: The social networks of sharing economy platforms are broad and diverse, both in terms of intra- and inter-industrial cooperations. Primarily, the partnerships are formed with (a) financial institutions and investors, (b) existing institutions and industries, and (c) other sharing economy platforms.

    i.   Financially, startups are usually supported by angel investors, incubator hubs and venture capitalists. While many of them do not necessarily invest on the basis of the startup's association to the sharing economy, proof of concept and economic viability gives investors confidence to support sharing economy platforms. For example, through *Rocket Internet* investment, *Tripda* was able to "focus on customer service and not bother with monetization in the short term" (Balea, 2015). *U-hop* received investments from an unnamed Philippine corporation, a boutique investment banking firm, and others totaling to US$7.4 million which will be used to intensify their operations in the Philippines, and expand to Singapore, Malaysia, Indonesia, Thailand, Vietnam, Myanmar, China, India and Japan (Balea, 2016). Furthermore, the capital raised will also be used to further enhance their information and technology infrastructure, acquire more partners and hire 500 more additional staff. *Gawin* is supported by regional and international investors such as *500 Startups* of the US, *East Ventures* of Japan and *Venturra Capital* of Indonesia (Freischlad, 2015).

    ii.   In order to increase awareness and capture more users, sharing economy platforms form partnerships with existing institutions and industries. As mentioned earlier, the main consumer segments of these sharing economy initiatives are people ages 18 to 34, students and young professionals. Therefore, platforms like *Tripda* and *U-Hop* partnered with universities and corporations. Similarly, *PortfolioMNL* tied up with creative schools, organizations and companies to facilitate easier networking with other creative artists and easier recruitment processes (Tan, 2015). *Giftlauncher* partnered with merchant partners so wishers can get the items from their shops (Magdirila, 2014). To enrich the experience of its coworkers, coworking spaces like *co.lab* and *47 East*, partner with businesses like restaurants, yoga and wellness centers and Microsoft for freebies and discounts. *Grab* partners with taxi companies while *Etobee* with other smaller logistic fleets. These strategic partnerships with established institutions position the sharing economy initiatives as allies as opposed to competitors.

    iii.   Occasional partnerships and collaborations within the sharing economy also occur. For example, *PorfolioMNL* collaborated with *co.lab* to promote social responsibility and sustainability in creative design (Libatique, 2013). In the crowdfunding sector, aside from a Facebook group, there are some informal meetups among other crowdfunding players (P. Dulay, personal communication, March 31, 2016). There were some initiatives from *co.lab* to partner with other coworking spaces but maintaining the level of interest was difficult (F. Zimmer-Santos, personal communication, March 31, 2016). There is also a noticeable divergence in terms of leadership as can be observed from the two Facebook groups of coworking spaces Philippines. As Ms. Zimmer-Santos of *co.lab* expressed, "Collaboration takes more than desire; there needs

to be a genuine priority." She further explained that despite this, there is mutual respect and healthy competition among other coworking spaces.

Schot & Geels (2008) observed that "…the nature of social networks determined the depth and breadth of learning processes. Networks that were broad and contained outsiders provoked more second-order learning." However, the partnerships are rather diverse but not targeted, broad but weak and temporary, and do no facilitate second-order learning that is geared towards sustainability. Also, in terms of sustainability, partnerships with venture capitalists or other traditional institutions may enforce unsustainable practices upon these sharing economy platforms.

c. *Learning processes*: Startups are highly flexible and reflexive in terms of modifying their business models and operations. Since many sharing economy initiatives are startups, learning is innately part of the nurturing process. These learning methods are a combination of first-order learning and second-order learning. Learning processes are endogenous in terms of the built-in rating and reputation systems that enable the platforms to understand the interaction dynamics of its users. For example, *Uber* was able to determine the pick-up and drop-off points for its *uberHOP* product line using data from *UberX*.

Local platforms also learn from global sharing economy platforms. For example, *Plato* took inspiration from *EatWith* and *Mober* from *GoGoVan* of Hongkong. Likewise, global platforms listen to local market signals in order to properly adapt the technology to the needs of the Metro Manila market. For instance, due to low credit card penetration, many platforms are looking for payment alternatives. As an example, *Uber* and *Etobee* had to incorporate cash upon delivery payment as a response to the local user conditions.

Lastly, most of the sharing economy platforms put a high importance in continually improving and maintaining the quality of their products and services in order to establish good reputation and capture more customers. Hence, despite being adventurous and risk-takers, many platforms have stringent screening processes before service providers can participate in them. To cite, *Mober* van partners need to submit van registration, driver's license and even attend seminars. *Plato* and *Good Meal Hunting* screen their chefs and homecooks. *The Spark Project* handpicked their first crowdfunding projects, and holds screening and training processes for new crowdfunding projects. *Cropital* assesses the farmers they support by validating their information from the local government. With *Uber*, according to one driver, if drivers score less than 4.2 stars (average), they are automatically removed from the platform and will have to apply again and attend training workshops.

"Failed niche developments could often be related to either minimal involvement of outsiders in the experiments and a lack of second order learning, or to minimal involvement of regime actors which resulted in lack of resources and institutional embedding" (Schot & Geels, 2008). Schot & Geels (2008) also highlighted the need to link with ongoing processes at broader regime and landscape levels. In this sense, the sharing economy is doing well because learning and experimentation is real-time and occurs outside of a laboratory or small geographical pockets. Nevertheless, all the nurturing processes have no relationship in improving sustainability; all are oriented towards improving the business itself and being more competitive but without deliberate intent to be holistically sustainable.

8.3 Empowering Processes

The sharing economy in Metro Manila primarily apply *fit and conform* empowerment strategies; it is conforming to existing standards than radically replacing them with sustainability criteria. The sharing economy is supporting current neoliberal criteria of profit and cost savings. This is not, however, surprising as many sustainable innovations adopt fit and conform empowerment strategies where it aligns its narratives with prominent socio-political agendas and existing cultural frameworks in order to enroll established interests more easily (Raven et al., 2016). Hence, because the sharing economy framings are in line with socio-political goals that resonate with broader socio-political agenda such as economic growth and job creation, it is proving to be advantageous in terms of mobilizing resources. However, the caution is that this may actually be disempowering in terms of sustainability (Smith & Raven, 2012).

The sharing economy further manifests fit and conform strategies in three ways. First and foremost, the fact that the sharing economy does not seek to replace existing industries but to simply complement them or capture underserved markets makes the sharing economy appear to not be a threat to the current regime. Second, in terms of technology, since it is not within the scope of the sharing economy to improve the technological infrastructures of Metro Manila (particularly internet access and speed), minimal influence is being enforced to incumbent Internet service providers to improve their technology. At most, what these platforms can do is to tangentially send signals. As Mr. Tan of *Freelancer.com* expressed, the hope is that by capturing a large user base, the sharing economy can prompt Internet service providers to expand their operations to remote areas where there is a big market. *OLX Philippines* also partners with other players to bring free Internet to more Filipinos (Ferraz, 2015b). For now, what many can do is to make sure that their platforms are compatible with the current speed of connection in Metro Manila. *Spaceal* particularly developed its mobile application for the slow Internet speed in Metro Manila. Lastly, most of the platforms are operating using existing regulations that does not truly reflect their business while some are working within the loopholes of regulations. For example, coworking spaces are subjected to sub-leasing regulations while that does not really fit into their business model.

Table 7. Narratives of fit and conform versus stretch and transform

DESCRIPTION	FIT AND CONFORM	STRETCH AND TRANSFORM
Objective	The objective in fitting and conforming is to convince the wider social world that the niche can become competitive on conventional, regime criteria. It will perform profitably in existing markets and does not require radical changes in the regime.	The objective in the stretching and transforming form of niche empowerment is to convince the wider social word that the rules of the game need to be changed. The selection pressures constituted by prevailing regimes need to be transformed in order that niche-derived forms of sustainable solutions may flourish.
Shielding processes	Temporary	Institutionalisation of sustainability criteria
Nurturing processes	Learning is geared towards enhancing competitiveness	Learning is geared toward enhancing sustainability
Audience	Existing industry bodies, sponsoring government ministries, institutional investors committed to the regime, standard institutes, etc.	Civil society organisations, political parties, opinion formers in the media and education, trade unions, institutional investors, sectors that might benefit in opening and re-configuring of the regime, etc.

Source: Smith & Raven, 2012

As suggested by Raven et al. (2016), adopting both empowerment strategies simultaneously is considered to be strategic. However, stretch and transform strategies often require a lot of resources and political power to mobilise change (Raven et al. 2016). Also, it first requires to be legitimated by validation (Table 7 compares the narratives of the strategies) (Johnson,

Dowd, & Ridgeway, 2006). Nevertheless, it could be said that because of the fact that sharing economy platforms are changing user behavior across several economic activities and have some lobbying efforts, this is already a stretch and transform strategy. Still these are not enough especially because it is not targeted towards institutionalising sustainability criteria.

8.4 Resisting Processes

Geels (2014) latest contribution to the sustainability transitions literature on *resisting processes* provides an external dimension on how niches are competing with existing industries. To provide further guidance on how resisting forces influence niches, we incorporated Benford & Snow's (2000) notion of *contested processes*. According to them, resistance can manifest through counterframing by movement opponents, bystanders, and the media; and by frame disputes within movements.

a. *Counterframings*: Counterframings are articulated by external parties. Sharing economy platforms in the Global North are met with strong criticisms from existing industries. However, for Metro Manila, this is only true for the transportation sector with taxi associations filing complaints to the government and staging protests against car-sharing platforms. On the contrary, dominant industries could be more welcoming about the sharing economy. Ms. Rondario of *Impact Hub* observes that many industries are willing to partner with innovation hubs because they find value in acquiring new ideas that could be incorporated into their own products and services. It is akin to having an external Research and Development team.

The government is somewhat in-between; there is a desire to support good business practices but hesitant to facilitate very radical changes that will disrupt the status quo. In terms of policy intervention, the transportation sector is the first to be regulated. However, with *Uber*, *Grab* and *U-Hop* being the only ones with license to operate, other competing and upcoming platforms are however disappointed that the regulation was designed only for the likes of *Uber* and *Grab* (N. Escobal, personal communication). Soon, the government will begin crafting a crowdfunding regulation. Senator Bam Aquino however is cautious in saying that while they are open to working with stakeholders on designing regulations that may affect the sharing economy, they first want to make sure that regulation will indeed foster an enabling environment for the industry (B. Aquino, personal communication, April 22, 2016). *Cropital* agrees by saying that the crowdfunding platforms need more experience first before they can even begin lobbying for regulation.

The greatest resistance is in the current infrastructure and cultural barriers. Infrastructure relates to the Internet speed, payment services, and business registration process. Internet speed in the Philippines is between 2 to 5 Mbits/s while neighboring countries have at least 10 Mbits/s (*Philippine roadmap for digital startups: 2015 and beyond*, 2015). The same report also cites that credit card penetration is at 3% which forces sharing economy platforms to innovate when it comes to payment services. Almost all of the interviewees cited that business registration processes is a challenge since current business categories do not exactly apply to their business model.

Culture-wise, some say it is about timing and market readiness. Mr. Coser of *Tripda* says that "Filipinos may not be naturally inclined to carpool, given [their] distrust of strangers" (Ferraz, 2015a). Although this runs opposite to *Ridefind's* view that "Pinoys are a very social people. Not only is the service utilitarian; you can meet friends, do networking for your business and build a network" (Papa, 2012). In the crowdfunding sector, based on the observation of Mr. Dulay of *The Spark Project*, 80% of those

supporting crowdfunded products are still family and friends and the remaining 20% relied on good marketing and promotions. Ms. Jocona of *GiftLauncher* agrees saying that educating people about crowdfunding is in fact a major goal of the platform; crowdfunding is still foreign to Filipinos because there seems to be a disconnect with the traditional concept of purely physical sharing from virtually-facilitated sharing (Magdirila, 2014). But some are optimistic that the new culture of sharing will grow because "Crowdfunding uses technologies like social media and online payments to raise funds for a project…The Philippines is one of the most socially dynamic countries in the world. [Filipinos] spend an average of eight hours a month in social media alone. The emergence of daily deal sites and low-cost carriers the past years have really paved the way for more and more Filipinos to be comfortable in transacting online… it's time for us Filipinos to turn our social networking and online shopping activities for good and use it to back worthwhile projects. Filipinos are innately generous [towards] ideas they resonate with, we just need to direct them to a place where they can make an impact with just a mouse click" (Albano, 2013). In coworking spaces, according to Ms. Zimmer-Santos of *co.lab*, the first coworking space in Metro Manila, only expats, Filipino-Americans and members of the diaspora were initially aware of coworking spaces and it took years before the idea spread among Filipinos.

As for the education sector, the mindset that learning occurs most effectively within the confines of bricks and mortar schools is still highly prevalent. Hence, it is likely that *Khawna*, an instructor-led learning sharing platform, partly failed because Filipinos are not yet ready to accept a new method of learning (G. Javelona, personal communication, March 22, 2016). This inertia, brought about by senior educators, prevented radical changes in the current educational system.

In the goods sector, participation in Metro Manila is not as strong as it is in Europe because of the strong hand-me-down culture and emotional ties with possessions among Filipinos (R. David, personal communication, April 12, 2016). Also unlike in Europe, where the second-hand market is mature, the practice of taking care of goods with the intention of selling it later on is not yet embedded in Filipinos (R. David, personal communication, April 12, 2016). Thus for OLX, it aims to change Filipino's mindset on goods ownership in order to make them more aware of the benefits of keeping items in good condition in order to sell them later on.

b. *Frame disputes*: Interviewees from the transportation services, crowdfunding, logistics delivery and pre-owned good sub-sectors seem to have the strongest familiarity of and affinity to the sharing economy. Yet within the movement, there is lack of a common definition of what the sharing economy is, while some are either not well aware of what it is or cannot properly articulate it. As previously stated, the lack of leadership within the sharing economy community is problematic in light of sustainability transitions.

8.5 Summary and Implications of the Sustainability Transitions

The sustainability transitions framework confirms that the sharing economy is not deliberately attempting to contribute to sustainability. In fact, it is probable that the sharing economy is following a neoliberal capitalist pathway and driving more consumption. This finding is similar to Martin (2016) findings for the Global North. The shielding processes of the sharing economy in Metro Manila are too passive as it does not directly challenge the current regimes. While nurturing processes are a mix of both first-order and second-order learning, there are no clear expectations targeted to sustainability nor does the sharing economy partner with

institutions to improve their sustainability performance. Finally, the sharing economy adopts fit and conform empowerment strategies that allows it to become competitive in the current market using established criteria as opposed to institutionalising new standards that relates to sustainability.
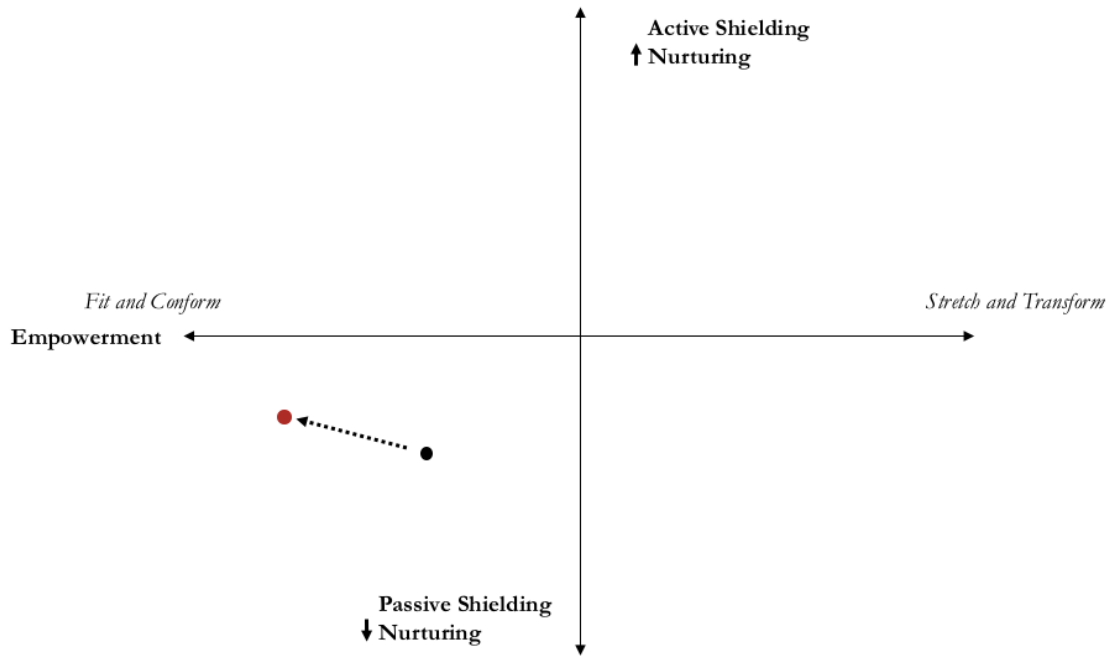

Figure 5. Graphical representation of the current sustainability transitions scenarios of the sharing economy in Metro Manila
(Black dot = current position, red dot = current trajectory; arrow = pathway)

The implications of this analysis are significant. There is a greater impetus to shift the focus of the sharing economy in the Global South towards adopting more sustainability dimensions given its tendencies to further reinforce neoliberal capitalism and promote unsustainable consumption. To do so, it must actively position the sharing economy as a *sustainable substitute* and not just complementary or alternative to existing services in the long term. It must also actively challenge existing regimes. Otherwise, it will only be contributing more to unsustainable practices. In fact, addressing this potential now is timely. As suggested by Geels (2014), instead of just improving the green innovation itself, equal attention towards destabilising the resisting forces/regimes are also needed. Thus, the minimal external resisting forces creates an enabling environment for the sharing economy to advance more sustainable production and consumption practices.

However, to do this, it would be advantageous for the sharing economy movement to have an organisation that brings all the sharing economy platforms together to set expectations, agenda, strategies and targets, especially in terms of contributing to sustainability. For example, this can be a sub-group within the Philippine umbrella startup organisation that is currently in the works (see *Philippine roadmap for digital startups: 2015 and beyond*, 2015). External parties, particularly environmental groups, should be included in this group to provide insights on how to improve the sustainability of the sharing economy in the Philippines.

Furthermore, the analysis in this Chapter also points to the possible role of the government in facilitating the sustainability of the sharing economy. Schor (2014) advocates that "by embedding sharing practices within those larger municipal level movements, the likelihood that the sharing movement can achieve its stated [sustainability?] goals is greater." Some government actors have expressed openness to sharing economy platforms especially if it aligned with socio-economic agendas of the government. Hence, it would also be timely to start coordinating and collaborating now so that both interests can be served well.

9 Discussion

The scope of this thesis was ambitious yet necessarily so. The aim was to provide a comprehensive picture of the sharing economy in Metro Manila as a case study for the Global South; the intention of the research is to lay the initial groundwork and provide a basis for future researches. Hence, as a starting point, this covers a rapid assessment of the sharing economy in Metro Manila. As of writing this thesis, however, the sharing economy continues to grow, taking different business models, and expanding to other economic sectors. Thus, the inventory and analysis generated are valid only during the period of data collection. Nevertheless, the limitations of the research presented here do not undermine the reliability of the results and analysis. Appropriate contingency measures were incorporated in the methodology to accommodate for foreseeable problems and constraints in data collection.

The study was able to adequately answer the posed research questions using several research methods and analytical frameworks. The results are representative for Metro Manila and, to a certain extent, generalisable to other Global South cities due to similar socio-economic conditions, and the multitude of the data collected and informants interviewed. However, some key reflections on how to improve the research design and analytical frameworks surfaced in the processes of doing this research. This Chapter also recommends further research areas.

9.1 Reflections on the Research Design

Given that this is the first study on the sharing economy in the Philippines, the aim was to first give a broad picture of the sharing economy platforms. As such, this research lays grounds for future researches with more narrowed and targeted scope. For example, a more in-depth analysis of the most developed economic or sharing economy sector, in this case the transportation sector, may be ripe for a more focused research. Another potential area to explore on is the perceptions and roles of other actors aside from platform developers, such as government agencies and industry players, in influencing the sharing economy. Although this was the original intention of the current research, limited familiarity of these actors and institutions with the concept of the sharing economy made the research premature. Engaging other actors may be possible as the phenomenon matures and if the sharing economy starts creating a level of traction that would directly challenge regime actors.

The two analytical frameworks used in this research were helpful in sufficiently answering the research questions. This study only used qualitative methods for data collection and analysis. Looking back, the thesis could have also benefited from a quantitative approach. For example, *after* each interviews, the informants could have been requested to answer a questionnaire survey to indicate their level of association (e.g. using Likert-scale) with the pre-determined framings. This way, results could have added a layer in the triangulation of data. The results would have also been easily summarised and presented without having to explain very descriptively. To take into account the interviewee's limited time availability, the survey should be kept short that could be answered in less than five minutes.

The sustainable transitions framework proved useful for unveiling this bleak trajectory of the sharing economy heading towards a neoliberal capitalism pathway, fueling more resource consumption. The framework can potentially be useful in identifying ways how this path can be averted. However, an alternative approach is to utilise the multi-level perspective (MLP) on socio-technical transitions (Geels, 2002, 2011; Smith, Voß, & Grin, 2010). Instead of focusing on the niche and its three functional processes, the MLP looks at a broader picture that entails analysing the entire system of production and consumption (Geels, 2002). However, this would be more appropriate when the sharing economy in the Global South matures over time.

Finally, this thesis also demonstrated that using the framing concept of "resisting processes" added value by showing that niche development is also equally dependent on its interaction with the regime. While Geels (2014) have used resisting processes from Benford & Snow (2000) in describing this tension, this research delved into it deeper by applying more related concepts. For future research, combining and harmonising the framing concept (i.e. frame development processes) with the sustainability transitions framework (i.e. niche functional properties) will streamline the discussion. To illustrate this potential synergy, Figure 6 briefly shows how the two complement each other.
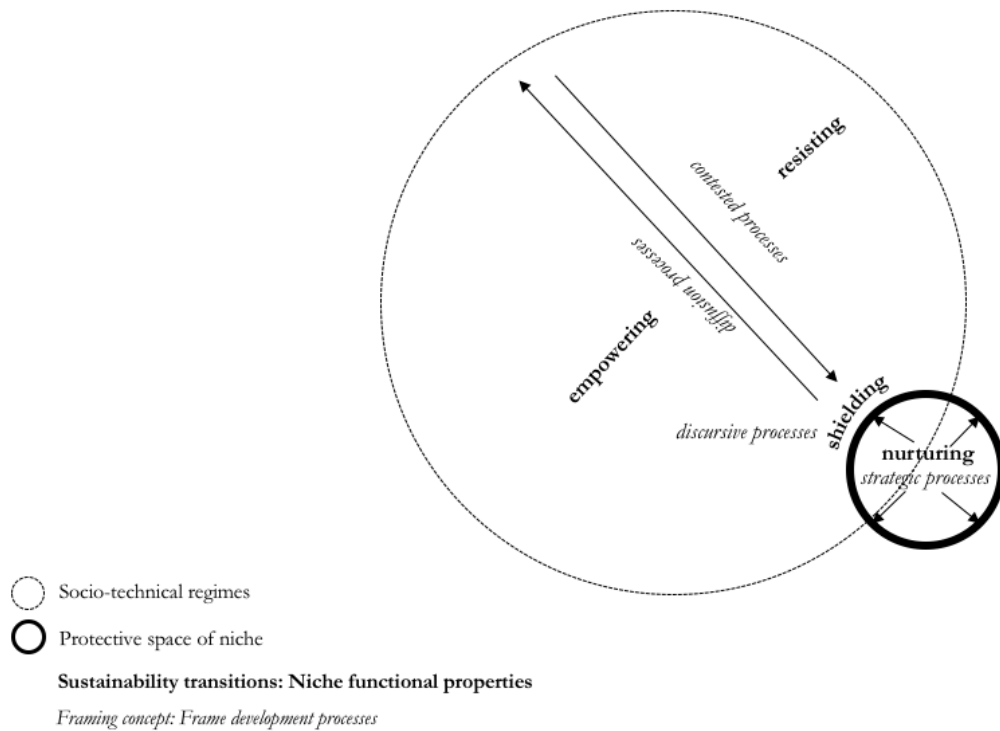

Figure 6. Potential synergy between sustainability transitions framework with the framing concept.

9.2 Further Research Areas

The novelty of the sharing economy especially in the academic field opens a plethora of research agendas. As pointed out in Chapter 2, there are on-going studies on refining the conceptual understanding of the "sharing economy", related terminologies and more nuanced definitions. These studies are indeed important contributions but other simultaneous research priorities will further advance this discipline. Specifically, in line with the findings and analysis of this thesis, five research agenda could be further explored on.

First, this empirical study confirms that environmental sustainability is similarly low in importance in the Global South as it is in the Global North. The question arises then: where is the empirical evidence for claiming that the sharing economy could be an alternative pathway to sustainability? At what point will a more balanced approach to sustainability be considered as important by most, if not all, of the stakeholders? Martin et al. (2015) claim that the sustainability potentials are greater among more grassroots innovations and community-sharing initiatives. However, this claim remains to be proven as well.

Second, the sharing economy is greatly expanding beyond goods and physical transactions into exchanges of human services and intangibles. This is clearly seen in the growth of the

Honeycomb model: *Honeycomb 1.0* (6 sectors), *Honeycomb 2.0* (12 sectors) to *Honeycomb 3.0* (16 sectors). This gives rise to three important research issues: (a) What are the implications of this development for labour conditions; (b) How can intangibles such as digital resources and information sharing be measured in terms of sustainability; and (c) What should be the appropriate unit of analysis? Question (a) is likely to be especially important for developing countries where human resources are abundant and jobs are needed.

Third, in the course of the research process, other Asian countries such as China, India and Indonesia appeared to be equally attractive case study choices given the growth of businesses that resemble sharing economy features. Similarly, as the Nielsen (2014) study also show, countries in Latin America also boast a vibrant landscape of sharing economy platforms. In a personal conversation with Mr. Duncan McLaren, co-author of "Sharing Cities", he hypothesizes that Hispanic countries would likely have more sharing economy initiatives due to a more prevalent culture of sharing than in the US or Europe. Hence, beyond association with the Global South, perhaps a more geo-cultural approach in the study may reveal particularities and commonalities of the sharing economy platforms and sustainability transitions pathways.

Fourth, this research primarily interviewed sharing economy platform developers for the reason described earlier in this Chapter. For other Global South cities where the sharing economy concept is more popular, a user study on behavior, acceptability, perceptions and motives for participation in the sharing economy can help better inform platform developers. In the Global North, several studies have looked into these (c.f. Böcker & Toon, 2016; Decrop & Graul, 2016; Forno & Garibaldi, 2016; Parguel et al., 2016; Raz, 2015; Robinot, Durif, & François, 2016; Roux, 2016). As what many of the interviewees mentioned, the environment is a hard sell. However, the author is speculative if this is still accurate. With the growing awareness and effects of climate change especially in the Global South, perceptions might have changed and users may be more willing or motivated to participate due to environmental reasons no matter how minor of a consideration it could be.

Lastly, if the sharing economy for both the Global North and the Global South is likely to reinforce neoliberal capitalism and overconsumption, then it warrants an examination of, if and how, the two landscapes are interacting with each other. The power dynamics between the two landscapes could point to how and why the sharing economy is forming its neoliberal capitalist identity. This will also help reveal if the Global South is contributing to the concept formulation and (sustainability) pathway development of the sharing economy discourse. One question to pose for example is: how can the Global South influence the direction of the sharing economy?

10 Conclusion

The purpose of this research is to contribute to the sharing economy discourse, particularly with regard to its sustainability, by providing insight from the Global South. Two main research questions were posed:

- How do sharing economy platforms in Metro Manila compare to the Global North in terms of its sustainability claims?
- How and in what direction is the sharing economy transitioning on its path to sustainability?

In comparison to the Global North, the sharing economy in Metro Manila is still at its infancy, lacking diversity in sectorial representation and business model. Currently, there are sharing economy platforms in 8 sectors: transportation, services, goods, logistics, food and learning sectors, with the transportation sector having the most number of platforms and the learning sector the least. All of these platforms aim to help address problems that fail to satisfy the basic needs and services of Metro Manila citizens. This includes inefficient public transportation, unemployment, and expensive products and services. Furthermore, unlike in the Global North, all except one sharing economy platforms in Metro Manila require monetary payments while none are exclusively catering to luxury products and services.

At its current state, the sharing economy in Metro Manila is incompatible with the principles of sustainability. The sustainability claims are primarily linked to economic and social sustainability as opposed to a holistic and balanced contribution to the three pillars of sustainability. The environmental sustainability dimension is almost irrelevant; the sharing economy platforms subscribe to environmental sustainability at a lesser extent than platforms from the Global North.

Similar to the Global North, economic and social sustainability are the main diagnostic and motivational framings that the sharing economy platforms in the Global South employ to attract users. The persuasive power primarily stems from the need to satisfy basic needs such as efficient public transportation, employment and extra income, which current regimes in the Global South fall short to provide and the need for cheaper alternatives than existing options. By linking the sharing economy to urgent socio-economic problems and providing more efficient solutions, it is easily mobilising the support of people.

The sharing economy in Metro Manila is positioned as a complementary or alternative to existing services, not as a substitute. Further, most platforms target specific and underserved markets that enable the sharing economy to enjoy a passive shield, effectively avoiding the direct scrutiny and the immediate opposition from incumbent industries. The sharing economy benefit from this protective space as it further develops its own products and services. This continuous act of innovation is innately part of the design of these sharing economy platforms, particularly through the rating and reputation system. Sharing economy platforms also partner with broad and diverse regime actors. However, while these would have been generally viewed as good from the business perspective, both these shielding and nurturing processes are not directed towards replacing the currently unsustainable criteria. Hence, the sharing economy is utilising fit and conform empowerment strategies that makes it more susceptible to adhering to conventional standards that are not likely to be characterised by sustainability.

Direct resistance by existing regimes to sharing economy initiatives is currently unheard of except for the transportation sector. On the other hand, with the sharing economy currently

considered under the broader "innovations economy", it is likely that the Philippine government will be more supportive of it given that it fuels creativity and economic activity, and pushes industries to deliver better and more efficient services.

Poised by some in the Global North as an alternative pathway to sustainability, the strong economic and social positioning but poor environmental sustainability positioning of the sharing economy in Metro Manila are strengthening neoliberal capitalism and consumption. The sharing economy is, therefore, no different from existing industries in terms of its current lack of ability and desire to change systems into more sustainable ones. If this trend continues, it is likely that the sharing economy will fail to become an alternative pathway to sustainability.

This research contributes to the sharing economy discourse and sustainability transitions literature. First, this is the first comprehensive academic study on the state of the sharing economy in the Global South, as represented by Metro Manila. The implications of the findings and analysis are significant especially in light of the continually growing population and urbanization in many of the Global South cities. For one, if the sharing economy heavily relies on actual human services, this would then require developing social safeguards to protect both ends of the users. Also, if the services sector is currently the main contributor to the economic growth of Metro Manila, the sharing economy may either positively or negatively disrupt the development of the region. Hence, there is a greater impetus to shift the direction of the sharing economy in the Global South towards a holistic approach to sustainability dimensions given its tendencies to further reinforce neoliberal capitalism and overconsumption. Otherwise, it will only be contributing to the current unsustainable lifestyle in cities.

Second, to the author's knowledge, this thesis is among few studies that apply the sustainability transitions framework to soft infrastructures, in this case the sharing economy. Normally the sustainability transitions framework is used for renewable energy technologies. Additionally, this research builds on the work of Geels (2014) on resisting forces against niches. While resistance in Geels' research primarily occurs from external forces, using Benford & Snow's (2000) notion of contested processes shows that resistance that inhibits the growth of the niche also happens within and between niche players as well. Furthermore, using the concept of resisting forces, this thesis stresses the need to not only focus on internal developments in improving sustainability and resisting regimes but must also be simultaneously active in destabilising the existing regime.

Third, this research also highlights the importance of using appropriate categorizations in order to properly nuance the sustainability claims. This thesis utilised Owyang's Honeycomb 2.0 and in doing so, it was able to illustrate that sustainability potentials are contingent on the sector it belongs to. Other catergorizations can be used but establishing the parameters of the assumptions and parameters must be transparent. Clearly, using one or a few sharing economy platforms as basis for generalising the findings for the entire sharing economy is flawed and problematic.

There are a number of research areas that this thesis opens up. For a concept as fluid as the sharing economy, assessment studies are only as good its ability to be relevant, sensitive and adapt to this evolving movement. Certainly, at its current state and in terms of its short-term trajectory, the sharing economy in the Global South is not sustainable. However, the sharing economy is not a lost cause yet. Through the frameworks used, it was able to reveal the gaps and flaws that could allow future researches to recommend on how this bleak trajectory could be averted.

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Sharing economy platform websites:

Transportation	
Beep	http://www.beeparide.com/bik
BikerX	http://bikerx.ph/
EasyTaxi	http://www.easytaxi.com/
Grab	https://www.grab.co/ph/
Ridefind	-not operational-
Tripda	-not operational-
Tripid	http://www.tripid.ph/
Uber	https://www.uber.com/cities/manila/
UHop	https://www.u-hop.com/
Services	
Freelancer.com	https://www.freelancer.com/
Gawin	http://gawin.ph/
HeyKuya	https://heykuya.com/
OLX	https://www.olx.ph/
PortfolioMNL	http://www.portfoliomnl.com/home
Raket.ph	http://raket.ph/
Tralulu	http://tralulu.com/

Money	
ArtisteConnect	-not operational-
Cropital	https://www.cropital.com/
Gift Launcher	http://www.giftlauncher.com/
Microbnk	https://www.microbnk.com/
The Spark Project	http://www.thesparkproject.com/

Goods	
Magpalitan	-not operational-
OLX	https://www.olx.ph/
Rentipid	http://www.rentipid.com/beta/
Reshop.ph	http://www.reshop.ph/
Sulit.ph	http://www.sulit.ph/

Space	
Flyspaces	http://flyspaces.com/
Makerspace Pilipinas	-not available-
Myproperty.ph	http://www.myproperty.ph/
Spaceal	http://www.spaceal.com/
Zipmatch	http://www.zipmatch.com/

Logistics	
BikerX	http://bikerx.ph/
Etobee	http://www.etobee.com.ph/
GrabExpress	https://www.grab.com/ph/express/
Mober	http://mober.ph/

Food	
Good Meal Hunting	http://www.goodmealhunting.com/
Plato	http://plato.ph/beta

Learning	
Khawna	-not operational-

Appendix A: Data Collection Method

	Platform/ Business/ Organisation	Sector	Name	Position	Date of Interview	Interview Method*	Participant Observation?
1	Khawna	Learning	Gian Javelona	CEO, OrangeApps	22 March 2016	S	Not possible
2	Tripid	Transportation	Michael Ngo Dee	Founder	26 March 2016	F2F	Not possible
3	Kickstart Ventures	Innovation and Incubator Hub	Pia Angeli Bernal	Manager, Social Impact Investments	29 March 2016	F2F	Not possible
4	Brainsparks and Bitspace	Innovation and Incubator Hub and Space	Lionel Victor Belen	Founder	29 March 2016	F2F	Yes
5	Impact Hub Manila	Innovation and Incubator Hub and Space	Ces Rondario	Cofounder	30 March 2016	F2F	Yes
6	The Spark Project	Money	Patrick Dulay	Founder and CEO	31 March 2016	F2F	No
7	Colab Xchange	Space	Francesca Zimmer-Santos	Founder	31 March 2016	F2F	Yes
8	Spaceal	Space	Benjamin Puzon	Marketing Manager and Innovation Consultant, BlastAsia, Inc.	31 March 2016	F2F	No
9	Plato	Food	Laurence Espiritu	Founder	1 April 2016	F2F	No
10	Cropital	Money	Ruel Amparo	Founder and CEO	1 April 2016	F2F	No
11	Launch Garage	Innovation and Incubator Hub and Space	Vance Ching	Community Hacker	4 April 2016	F2F	Yes
12	Good Meal Hunting	Food	Gear Fajardo	Founder and CEO	4 April 2016	F2F	No
13	Mober	Logistics	Dennis Ng	Founder and CEO	4 April 2016	F2F	No
14	MMDA	Transportation	Jojo Cruz	Officer in charge, Bike sharing project	7 April 2016	F2F	No
15	47 East	Space	Hanika Oyco	Marketing Officer	7 April 2016	F2F	Yes

16	Department of Science and Technology-Information and Communications Technology Office (DOST-ICTO)	Government	Monchito Ibrahim	Deputy Executive Director	8 April 2016	F2F	Not applicable
17	OLX	Goods	RJ David	Co-founder and Managing director	12 April 2016	F2F	No
18	Freelancer.com	Service	Evan Tan	Regional Director for South East Asia	12 April 2016	F2F	Yes
19	Etobee Philippines	Logistics	Armon de la Cruz	Business Development Manager	13 April 2016	F2F	No
20	Zipmatch	Space	Carrissa Hiquiana	Public Relations Head	13 April 2016	F2F	Yes
21	Makerspace Pilipinas	Space	Arthur Galapon	Coordinator	19 April 2016	P	No
22	Flyspaces	Space	Mario Berta	Founder and CEO	21 April 2016	F2F	No
23	Tralulu	Service	Andrew Cua	CEO and Co-founder	21 April 2016	F2F	No
24	-	Government	Senator Bam Aquino	Senator	22 April 2016	F2F	Not applicable
25	Uber Manila	Transportation	Alexandra Suarez	Driver Operations Manager	5 May 2016	S	Yes
26	Grab	Transportation	Lorelei Olalia	Public Relations Manager	-	E	Yes
**	Raket.ph	Services	-	-	-	-	Yes

*Interview Method: E= Email; F2F= Face to Face; P=Phone; S= Skype

**No interview done but the author was able to participate in the platform

Additional short interviews (less than 20 minutes)

	Platform/ Business/ Organisation	Sector	Name	Position	Date of Interview	Interview Method*	Participant Observation?
27	Securities and Exchange Commission (SEC)	Government	Vicente Graciano Felizmenio, Jr.	Director, Markets and Securities Regulation	21 April 2016	F2F	Not applicable

28	Beep a Ride	Transportation	Angeline Viray	Founder	21 April 2016	F2F	No
29	Sulit.ph	Goods	Anton Sheker	Founder	21 March 2016	F2F	No

*Interview Method: E= Email; F2F= Face to Face; P=Phone; S= Skype

Consultations

	Person	Affiliation	Date of Interview	Interview Method*
1	Duncan McLaren	Author of "Sharing Cities"	16 December 2015	F2F
2	Laszlo Pinter	Sustainability Expert, Central European University	5 January 2016	S
3	Dr. Chris Martin	Research Associate, School of Environment, Education and Development, University of Manchester	11 February 2016	S

*Interview Method: E= Email; F2F= Face to Face; P=Phone; S= Skype

Appendix B: Sample General Interview Questionnaire
Guide Questions for *Mober*

Basic information/profile

Name of platform	*Mober*
Interviewee's name and position	Dennis Ng, Founder and CEO
Address of (local) office	-
Sector	Transportation
Year of inception	July 2015
Year of operationalisation (official launching)	December 2015

Shielding: What the platform is about, its vision and current performance

- Describe *Mober*. How does the platform work? How does it generate money?
- What was the problem you saw that *Mober* could address? What were your motivations for coming up with this idea? What is your vision for *Mober*?
- What separates/differentiates you from other logistics companies and other logistics sharing platforms? Local and globally.
- Who is your target market? (e.g. age and geographical scope) Who are you actual users?
- How do you market *Mober*? Why should people participate in platforms like *Mober*?
- How is its performing now?
- What is your understanding of the term "sharing economy"?
- What is the view of Mober on the "sharing economy"? Do you identify Mober as part of this new economy?
- How does the environment play into this? Is there an environmental angle in your initiative? How about social impact?

Nurturing: Learning processes, partners and networks, locally and globally

- Who do you consider as competitors?
- Who were your partners (inter- and intra-industrial)?
- What kind of collaboration or partnership do you have with them? Is there financial assistance or in-kind assistance?
- Do you belong to any network (on knowledge exchange particularly)? Please describe what this network does.
- Do you engage with global actors?

<u>Empowering/Resisting: challenges, barriers, pressures</u>

- When was *Mober* initiated and launched?
- What were the main challenges, barriers or pressures that you faced while setting up the platform and now that its fully operational?
- Did or are you facing regulatory challenges (epecially when it comes to cargo insurance, business registration)?
- What kind of support or incentives do you want to get from the government? From similar industries?

<u>General</u>

- What are your hopes for the sharing economy, particularly for the logistics sector?