

# SHARING ECONOMY INDEX

2021



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# Executive Summary

The 2021 Consumer Choice Center Sharing Economy Index aims to provide consumers in Europe and globally with concise and relevant information about the availability and accessibility of sharing economy services.





# INTRODUCTION

As a result of the pandemic, many areas of economic activity have suffered, and the sharing economy is no exception. In fact, it would be fair to say that it has been one of the most severely hit fields. Quarantines and lockdowns globally have resulted in a drastic drop in demand for holiday flat sharing accommodation abroad and other sharing economy services, and, as a consequence, some governments have sought to use this as an opportunity to further restrict the sharing economy.

For example, in June 2020, Amsterdam [banned](#) short-term accommodation rentals including Airbnb from operating in the three districts of its historical centre. Fortunately, the ban was overturned in March this year.

In a similar fashion, in June 2020, Lisbon's mayor pledged to "get rid of Airbnb" once the coronavirus pandemic is over. However, Airbnb is still available in the city, and hopefully remains so.

The sharing economy demonstrated an outstanding adaptability to the challenges posed by the pandemic. Uber, for instance, obliged its drivers to take selfies to prove they were wearing masks and avoid contact with customers. The front seats were also required to be left empty to reduce interaction between drivers and consumers.

More generally, a limited amount of legal activities made using e-scooters or ridesharing apps mostly unnecessary. As an anonymous Bolt driver from Lviv (Ukraine) stressed, "while it was profitable to spend a day Bolt-ing or Uber-ing before the pandemic, now because of such low demand and only two-three requests a day, it has become more of a futile attempt to make enough just to pay for fuel."

However, it is not all doom and gloom. Delivery apps, on the contrary, have been a real game-changer during the pandemic, and that shows in their profits. In the first quarter of 2020, [Uber Eats](#) revenues [went up](#) by more than 50 per cent globally. Uber Freight – an app that helps carriers make hassle-free bookings and allows shippers to tender shipments easily – grew revenues by 57 per cent.

The innovative nature of the sharing economy has led to its undeniable success, and, more importantly, it has stood the test of the coronavirus crisis. One of the key tasks for the future should be to create and sustain favourable conditions for the sharing economy to continue to develop new ways of making our lives easier and better.

As a global consumer advocacy group, we at the Consumer Choice Center believe that consumer choice is pivotal, and services that bring value to consumers – be it Uber, AirBnB, ShareNow, or e-scooters – should be endorsed and encouraged.

This is our second and improved Sharing Economy Index of 2021 that aims to rank some of the world's most dynamic cities and to provide a valuable guide for consumers about the sharing economy services available to them.

Recently, we also published LATAM Sharing Economy Index of 2021 to provide an overview of the sharing economy services available to consumers in Latin America. In order to evaluate sharing economy friendliness, we examined 50 of the world's most dynamic cities to see which ones lead the way in the sharing economy.

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**Research Note:** *We strive to improve the quality of the underlying data of this index year by year and aim to refine its methodology moving forward. We sometimes faced contradictory information and indicators provided by different online sources, especially in the cases of taxes. We ask the readers of this index to acknowledge the difficulties of working with heterogeneous data and caution users of this index to be aware of the underlying data complications. Additionally, we revised some of the findings of the last year's Index and ask readers to see the 2021 Sharing Economy Index as an improved version of the 2020 Sharing Economy Index. The time span of dates ranges between 2018 and May 2021.*





## RANKING: TOP CITIES

	COUNTRY	CITY	POINTS
1		Tallinn	100
1		Tbilisi	100
2		Sao Paulo	95
2		Riga	95
2		Vilnius	95
2		Warsaw	95
2		Kyiv	95
3		Mexico City	90
3		Oslo	90
3		Stockholm	90

Tallinn remains the most sharing economy friendly city. Its low level of regulation of ride-hailing and flat-sharing services along with openness to e-scooters and outstanding innovation in the digital space helped take it to the first place. Estonia is well-known for its booming digital state,

and the fact there is even a carpooling app for kids reinforces this fact.

All top cities score high when it comes to flat-sharing, meaning that they do not overburden this important part of the sharing economy with city taxes or special permit requirements. However, Vilnius and Kyiv stand out on ride-hailing, out of the top 10 cities, as both are the only ones that do not require a special permit.

Eastern Europe continues to have a more liberal attitude towards the sharing economy while Western and Central European countries stick to the restrictive approach. Both Nordic capitals — Stockholm and Oslo — are among the top sharing economy friendly cities in the world. Similarly, their Northern European neighbours — Tallinn, Vilnius, and Riga — also score highest in the Index.

On the other hand, Minsk, Valletta, Amsterdam, The Hague, Bratislava, Ljubljana, Nicosia, Sofia, Tokyo, Athens, Luxembourg City found themselves at the very bottom of the list. These cities have chosen excessive regulation over the

interest of consumers thereby significantly limiting their consumer choice.

In May 2021, electric scooters were confirmed for a 12-month trial in London starting from June 7. To rent an e-scooter, UK consumers need to have a full or provisional car, motorcycle or moped licence.

In an attempt to preserve a liberal regulation of the sharing economy and e-scooters, in particular, while encouraging responsible use of those, on June 24, Kyiv City State Administration signed a Memorandum of Cooperation with operators of electric scooter rental services. The memorandum sets a number of rules for how to use e-scooters, such as speed limits and a complete ban in some crowded areas of the Ukrainian capital. However, by signing the memorandum, e-scooter companies voluntarily agreed to these rules, and are responsible for the enforcement.

Despite grim predictions at the beginning of the pandemic, the sharing economy has survived, though not without any losses. As with every service that has made our lives easier, platform businesses are extensively enjoyed by millions of consumers globally. Now that we know how great it feels to be able to ride an e-scooter, to rideshare, or to share a flat with locals, governments will have a hard time trying to rid us of these choices. The sharing economy is driven by creativity and entrepreneurship: what doesn't kill it, makes it stronger.

**Availability:** The Index provides an overview of the sharing economy services available to consumers in 50 cities.

**Access:** The Index examines the access to the sharing economy services on the supply side.

# BENEFITS OF THE INDEX FOR CONSUMERS?

The Sharing Economy Index provides a valuable overview of many of the services that are greatly enjoyed by consumers. More is always better, and the availability of various sharing economy services ensures consumers are able to have plenty of choices wherever they go. Our index gives you a glimpse into a diversity of ways your stay in a particular city can be better.

The pandemic has crippled economies in Europe and globally, and as we are recovering from the devastating consequences of an unprecedented health crisis, it is important that we are provided with more transportation and housing options to match our individual needs, preferences and budgets.

The updated index, therefore, not only helps consumers to see what cities have succeeded in preserving the sharing economy throughout the pandemic, but also provides a handy guide to various services globally.

The Sharing Economy Index is a one-of-its-kind compilation of applications you can use to improve your city experience. In Belgrade, for example, it's possible to make money through ride hailing without having to acquire a specific permit. However, in cities such as Luxembourg, Athens, and Ljubljana, ride hailing isn't available at all.





## CONCLUSION

Despite a few attempts to hinder its development, the sharing economy has survived the pandemic, and it is exciting to see its continuous growth. That especially concerns delivery apps which we didn't include in the ranking but added as an appendix. All of the analysed cities had at least one that is a true success. Furthermore, the emergence of local sharing economy apps contributes to the ever-expanding popularity of peer-to-peer platforms. Regardless of what the future holds in terms of health crises, we can expect the sharing economy to persist and grow.

# METHODOLOGY

## The maximum possible score for a city is 105.

*Special permits for the services requirement have been evaluated only by the apps requirements, and not by government regulatory mandates.*

### RIDE-HAILING SERVICES

*A city receives a maximum of 25 points for being the most friendly to ride-hailing services.*

- **Ride-hailing services availability:** *Ride-hailing service available: 10 points*
- **Access to the services:** *No special permit/license required by the app: 5 points*
- **Ride-hailing services taxation:** *No taxes on ride-sharing other than VAT or income tax: 5 points*
- **A city can get an additional 5 points if carpooling apps are available.**

### FLATSHARING SERVICES:

*A city receives a maximum of 25 points for being the most friendly to flatsharing services.*

- **Flatsharing service availability:** *Flatsharing available: 10 points*
- **Flatsharing available all year long:** *5 points*
- **Access to the service:** *No permit to share a flat/entire flat required by the app: 5 points*
- **Flatsharing service taxation:** *No taxes on flatsharing other than rental income tax or VAT: 5 points*

### E-SCOOTERS:

*A city receives a maximum of 15 points for being one of the most E-scooter friendly.*

- **E-scooters availability:** *E-scooter service available: 10 points*
- **Possibility of being used on sidewalks:** *5 points*

### CARSHARING APPS:

*A city receives a maximum of 30 points for being carsharing-friendly.*

- **A city receives an additional 15 points if professional carsharing apps are available.**
- **A city receives an additional 15 points if peer-to-peer carsharing among private owners is available.**

### GYMSHARING:

*A city receives an additional 10 points if gymsharing apps are available.*



# APPENDIX

RANK	COUNTRY	CITY	SCORE
1	Estonia	Tallinn	100
1	Georgia	Tbilisi	100
2	Brazil	Sao Paulo	95
2	Latvia	Riga	95
2	Lithuania	Vilnius	95
2	Poland	Warsaw	95
2	Ukraine	Kyiv	95
3	Mexico	Mexico City	90
3	Norway	Oslo	90
3	Sweden	Stockholm	90
4	Finland	Helsinki	85
4	Germany	Munich	85
4	Portugal	Lisbon	85
5	Germany	Hamburg	83
5	Switzerland	Zurich	83
6	Austria	Vienna	80
6	Hungary	Budapest	80
6	Italy	Rome	80
6	Romania	Bucharest	80
6	Serbia	Belgrade	80
6	Spain	Madrid	80
6	Germany	Cologne	80
6	Italy	Milan	80
6	Spain	Barcelona	80
7	Germany	Berlin	78
7	Switzerland	Geneva	78
8	The UK	London	75
8	Australia	Sydney	75
8	Belgium	Brussels	75
8	China	Shanghai	75
8	Croatia	Zagreb	75
8	Denmark	Copenhagen	75
8	France	Paris	75
8	The USA	San Francisco	75
8	Turkey	Istanbul	75
9	The UAE	Dubai	73
10	Czech Republic	Prague	70
10	Ireland	Dublin	70
10	The USA	New York City	70
11	Belarus	Minsk	65
11	Malta	Valletta	65
11	Netherlands	Amsterdam	65
11	Netherlands	The Hague	65
11	Slovakia	Bratislava	65
11	Slovenia	Ljubljana	65
12	Cyprus	Nicosia	60
12	Bulgaria	Sofia	60
13	Japan	Tokyo	55
14	Greece	Athens	45
15	Luxembourg	Luxembourg City	40

# ABOUT THE AUTHORS:

## **Maria Chaplia**

*Research Manager*

Maria holds a degree in law and studied econometrics and political science at the London School of Economics. Maria's views have been [featured](#) in the Financial Times, The Parliament Magazine, The Brussels Times, Huffington Post, CapX, Spiked, and many more. International trade is one of Maria's greatest passions, but she's also particularly keen on the sharing economy, feminism, and lifestyle economics.

In 2016, Maria co-organised a protest in Ukraine against taxpayer-funded stipends outside the Ministry of Education and Ministry of Finance. She has also co-founded two Ukrainian educational charities. She put together multiple large-scale events and was awarded the European Students For Liberty Student of the Year Award.

## **Anna Arunashvili**

*Knowledge Management Associate*

Anna holds a master's degree in public policy and management from Corvinus University of Budapest. She is passionate about spreading ideas of liberty and has been an active member of Georgian Students for Liberty, where she successfully co-organised multiple campaigns and events and co-hosted one of the biggest regional conferences.

She is an advocate for the sharing economy and believes shift from traditional models gives consumers more choice and makes everyday life more affordable.

## **Tamar Tarsaidze**

*Fellow*

Fellow at the Consumer Choice Center: Tamar has been a Local Coordinator of European Students For Liberty for 3 years. She is involved in civil society and has successfully organized large-scale conferences in her home country of Georgia. She is studying International Law at Tbilisi State University.



# CONSUMER CHOICE CENTER

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