

Incumbent Businesses within the Access Economy

Study into Incumbents' Strategic Considerations to Participate in the Access Economy and the Role of the Dutch Government



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Incumbent Businesses within the Access Economy: Study into Incumbents' Strategic Considerations to Participate in the Access Economy and the Role of the Dutch Government

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Preface

In front of you, you find the study *Incumbent Businesses within the Access Economy*. The study has been performed to graduate the master programme Sustainable Development – Environmental Governance at Utrecht University. I have been working on the thesis from November 2016 to June 2017. Representing 45 ECTS, the thesis is an important part of my two-year research master.

The strategic considerations of Dutch incumbent businesses to participate in the access economy are assessed within a multiple case study. In addition to the considerations of incumbents, the role of the Dutch government within the access economy is studied. At the end of the study, recommendations to the Dutch government are formulated, so the main target group consists of government officials. Though, the report is also relevant for incumbent businesses as they are the subject of this study and for new businesses within the access economy since this study might help them to set up collaborations with incumbent businesses. Lastly, the study is relevant for the scientific community whereas it enhances the existing bodies of knowledge about the access economy, strategic considerations and the role of the government.

This way I would like to thank my supervisor Walter Vermeulen for his valuable advices, detailed feedback and open mind for new ideas. He was always willing to think with me about ways for further improvement of my research or to critically discuss the results. Within the meetings he always triggered me with his open mind and new ideas about my study, which has been very valuable for me. Secondly, I would like to thank the respondents of this study for their openness to answer my questions and their sincere interest in my study. My appreciation also goes to Koen Frenken. His detailed feedback has absolutely improved my research. Lastly, my special thanks go to my partner, family and friends, who were always willing to listen, brainstorm, act as a second reader and to provide me with valuable advices, both about the progress and the content.

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Summary

Despite the materialistic outlook of our society, the access economy has caused a shift from ownership to access and changed the position of consumers, businesses and the government. Although the role of businesses in the access economy is acknowledged, there is no specific literature about the motivations of incumbent businesses to participate in the access economy. Because of this knowledge gap, the following research question is answered: *Which strategic considerations affect to what extent the participation of Dutch incumbent businesses in the access economy and to what extent does government policy affect these strategic considerations?* The research question is answered by performing a multiple embedded case study. Businesses within four sectors (yachts, automotive, home improvement and garden, and fashion) that (might) participate in the access economy are studied by performing a document analysis and personal interviews. The role of the Dutch government is assessed by analysing documents and personal interviews with government officials.

Literature about the access economy provides more insight into the conditions necessary for the access economy and the possible roles of incumbents within the access economy. The access economy is supposed to represent a changing environment for incumbents. The literature predicts that strategic considerations in a changing environment are determined by an interplay between managerial cognition and incumbents' capabilities and business models. Features of governance modes are defined to assess the role of the government.

Most of the studied incumbents do not experience a changing environment because of the access economy. The incumbents do often not believe in the presence of a critical mass and trust between strangers and are therefore unwilling to participate in the access economy. Incumbents' experiences with earlier adaptations, capabilities and business models also influence strategic considerations. The products are often unsuitable for the access economy and the traditional business model is based on selling products, which impedes participation. The incumbents are mainly willing to participate when the access economy can improve the current business model or generates more profits than the traditional model. So, for most incumbents the access economy is a mean instead of an end.

The government activities are still explorative and follow a case-by-case approach. The access economy is assessed at different government levels and within different departments, all having a different interpretation of the access economy. The main activity of the Dutch government is removing impeding regulation, which positively affects the access economy. Together with non-governmental actors the government is currently working on transition agendas for different sectors within the access economy.

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1 Introduction

“Earth provides enough to satisfy every man’s need, but not every man’s greed.”

Mahatma Gandhi

Consumption is very important within our society. However, consumption currently leads to overconsumption, which contributes to the global ecological problems we are currently facing (Carolan, 2004). Furthermore, it is often argued that the excessive materialistic outlook of the current society is one of the causes of the 2009 financial crisis (Manning, 2011; Tham, 2011). Besides the environmental and economic effects of overconsumption, studies show that overconsumption leads to increased levels of anxiety and depression, as well as the loss of friendships and robust communities (Putnam, 1995; Kasser, 2002).

Despite the materialistic society we live in, there has been a shift in consumer values from ownership to access. This shift causes a change in the position of consumers, businesses and the government (shareNL, 2015b). Because of communal sharing activities, consumers become suppliers of goods. Businesses face competition of these activities. Moreover, businesses offer new services and (digital) platforms to offer or enable the activities related to the shift from ownership to access. Lastly, for the government, the described shift brings in new chances and challenges (Frenken, Meelen, Arets & Van de Glind, 2015; shareNL, 2015b).

1.1 Access economy

In current literature, there has been used a wide variety of terms indicating the shift from ownership to access (Botsman, 2015). Common used terms include access economy, sharing economy, collaborative economy, collaborative consumption, rental economy, product service systems and peer economy. Even though these terms are used interchangeably, the actual meanings differ (Botsman, 2015). Eckhardt and Bardhi (2015) argue that the term access economy is the best way to define the emerging trend. The often-used terms sharing and collaborative economy assume that there are exchanges of goods or services among people who know each other, without any profit. However, the described trend is often anonymous and consumers are paying for access, which often makes sharing or collaboration an erroneous term. In this study, the shift from ownership to access will therefore be labelled as the access economy. Following Botsman (2015), the access economy is defined as “systems that enable people to pay for access to the benefit of goods rather than needing to own them outright”. A more detailed definition of the access economy will be provided in the theoretical framework of this study.

1.2 Role of incumbents

As already mentioned, the access economy affects the current practices of existing businesses (shareNL, 2015b). Businesses with an established position in a market are in this study labelled as incumbents or incumbent businesses (Black, Hashimzade & Myles, 2009). It is often argued that the access economy disrupts the traditional industries based on models of individual ownership (Koopman, Mitchell & Thierrier, 2015; Malhotra & Van Alstyne, 2014; Botsman & Rogers, 2010: p. 71). However, traditional markets can adjust to the access economy by participating in it. Incumbents that did not originally start with the aim to enter the access economy can participate in it by setting up a new business division (Frenken, 2015). The access economy is not only disrupting traditional markets, but is also posing new potentials for incumbents. In turn, these businesses can enhance the access economy.

1.3 Role of the government

The access economy provides also challenges and opportunities for the government (shareNL, 2015b). In the context of the access economy and more general of corporate responsibility, it is argued that governments should embrace and promote change and innovation (Hirshon et al., 2015; Albareda, Tencati, Lozano & Perrini, 2006; Fox, Ward & Howard, 2002). This is also confirmed by the Dutch government in the report *Innoveren in de deeleconomie (Innovation in the sharing economy)* (shareNL, 2015b). Moreover, the need for governments to promote corporate responsibility is endorsed by the European Commission (EC, 2001; EC, 2002).

The Dutch government already has policy programmes to promote sustainable consumption (Rijksoverheid, 2015; Rijksoverheid, 2016). However, these policy programmes do often not contain concrete measures. Existing literature shows that governments (not specifically the Dutch government) often impede the access economy because of regulations regarding liabilities and assurance, and the protection of existing markets (Boot, 2013; Metz, 2013; Allen & Berg, 2014; Le Vine, Zolfaghari & Polak, 2014; Barnes & Mattsson, 2016; Miller, 2016). Moreover, governments can stimulate the access economy using financial incentives (Bardhi & Eckhardt, 2012). These issues are currently not addressed in the existing policies. It should be noted that these issues are discussed in various debates in the parliament.

1.4 Research question

Despite the identified role of businesses in the access economy, there is no specific literature about the motivations of incumbent businesses to participate in the access economy. Moreover, there is no consensus in the broader literature about businesses' motivations. In order to stimulate businesses to

enter the access economy, there is a need for governmental action. However, the current policies do not have the desired effect. Because of these problems, the following research objective is formulated:

The objective of the research is to contribute to the knowledge about Dutch incumbent businesses in the access economy and to formulate recommendations to the Dutch government to stimulate participation of incumbent businesses in the access economy by making an analysis of the strategic considerations incumbents face in entering the access economy and identifying the relation between these strategic considerations and the possible role of the government.

The research contains two parts. In the first part, the strategic considerations of Dutch incumbents to participate in the access economy are assessed by studying businesses' motivations to (not) participate and their evaluation of this choice. The study is delineated to Dutch incumbent businesses. Incumbent businesses are businesses that did originally not offer services related to the access economy, but were based on the traditional model of ownership. Dutch refers to the fact that the businesses have to operate in the Netherlands. The study is limited to one country, because this makes it possible to generalise the found strategic considerations (there are no differences in contextual factors). The focus is on the Netherlands, since this country performs, compared to other European countries, relatively poor on sustainable consumption (Ostasiewicz, 2012). This enhances the relevance to study participation in the access economy in the Netherlands.

In the second part of this research, recommendations to the Dutch government are formulated about how to optimise the policy and stimulate businesses to enter the access economy. The recommendations are based on a systematic policy analysis and an analysis of the relation between governmental policy and the identified strategic considerations of incumbents (see Woskow (2014) for a comparable application). The research objective leads to the following set of research questions:

Which strategic considerations affect to what extent the participation of Dutch incumbent businesses in the access economy and to what extent does government policy affect these strategic considerations?

1. In which ways can Dutch incumbent businesses participate in the access economy?
2. Which possible strategic considerations can be found in the existing literature?
3. What are the main strategic considerations of Dutch incumbent businesses to participate in the access economy and what are their experiences after participation?
4. What are the main strategic considerations of Dutch incumbent businesses to not participate in the access economy and what are their experiences after no participation?

5. What Dutch policies are currently in place to stimulate incumbent businesses to enter the access economy?
6. In what way are the identified strategic considerations related to potential and existing practices of the Dutch government?

1.5 Research framework

Figure 1 provides an overview of the research framework. In Chapter 2 and 3, the elements of the framework will be further elaborated.

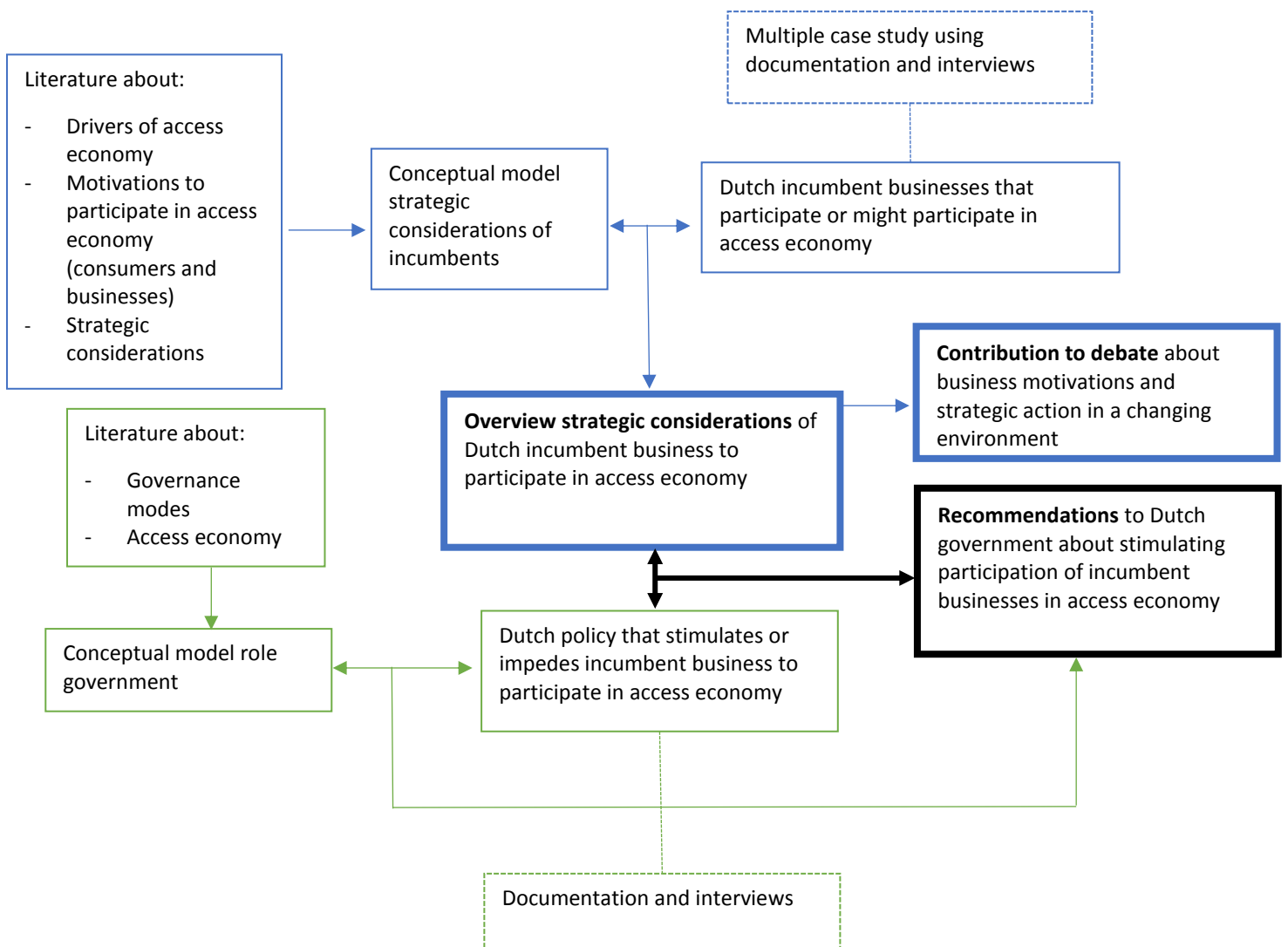


Figure 1: Research framework.

1.6 Scientific relevance

In the current literature, there is a lack of knowledge about incumbents entering the access economy. More generally, there is an academic debate about the motivations of businesses to participate in sustainable activities, such as the access economy. Since this research studies the strategic considerations of incumbents to participate in the access economy, it contributes to the described gap of knowledge in the scientific literature about business motivations. Moreover, in the current literature base, the majority of the studies focus either on capabilities or on managerial cognition (Eggers & Kaplan, 2013). This study combines both elements and therefore contributes to the current knowledge.

Secondly, the Dutch government aims to promote the access economy. Businesses play an important role in the promotion of the access economy and therefore, the government has to enter a more complex governance mode, in which collaboration with private partners might be necessary. This study contributes to the current literature about the way governments can effectively stimulate businesses to obtain sustainable practices. The existing literature is further discussed in the theoretical framework (Chapter 2).

1.7 Societal relevance

In addition to the scientific relevance of this study, there is a societal relevance. One of the Sustainable Development Goals, a set of goals to end poverty, protect the planet, and ensure prosperity for all, is to ensure sustainable consumption and production patterns (UN, 2016). This study aims to provide recommendations to the government that can help to achieve the stated Sustainable Development Goal. As is showed, the Dutch government needs these recommendations, since its policy does not accord to the problems businesses face. Moreover, the Netherlands lag behind in sustainable consumption compared to other European countries (Ostasiewicz, 2012).

For society, it is important to stimulate the access economy, since it can encounter the negative effects of overconsumption. Furthermore, the access economy is seen as a 'lifestyle facilitator' of the current societal needs (Katzev, 2003; Bardhi & Eckhardt, 2012). People often want to have more flexibility in their lives. The access economy can offer this flexibility. Hence, this study is relevant both for the scientific community and for society.

1.8 Sustainable development

Complementary to the scientific and societal relevance, this study contributes to the literature and knowledge about as well as promotion of sustainable development. Although the evidence is not clear-cut, there are strong indications that the access economy contributes to sustainable development (Botsman & Rogers, 2010; Leismann et al., 2013; Schor, 2014; shareNL, 2015a).

Firstly, empirical studies show that less products are needed for the same usage of the products (Leismann et al., 2013; shareNL, 2015a). Therefore, the negative environmental effects of production and disposal of the products is reduced by the access economy. Moreover, because there are less owners of the goods in an access economy, it becomes easier to achieve a circular economy (Botsman & Rogers, 2010). The sustainability effects of the access economy related to the usage of the product are less clear cut. Since people are becoming more conscious about the variable costs per usage, they are expected to reduce the number of usages (Katzev, 2003). However, consumers who did not have access to the good before participation in the access economy, use the goods more than they did before.

2 Theoretical framework

The aim of this study is twofold. Firstly, the question is answered why incumbent businesses are (not) participating in the access economy. Subsequently, based on these results, the role of the government is assessed and recommendations are formulated.

In the following section, the access economy is defined more precisely, relevant actors are identified and potential roles of incumbents are described. Moreover, the motivations of the relevant actors are briefly assessed. The motivations are based on literature about the access economy. In order to answer the research question, a broader range of literature is necessary. Therefore, literature about strategical considerations within a changing environment is discussed and applied to the access economy. Lastly, literature necessary to answer the second part of the research question of this study, how the Dutch government can stimulate incumbents to participate in the access economy, is discussed.

2.1 Access economy

Although there are historical examples of the access economy (for example public libraries), the scientific literature about the access economy is relatively recent. Searching Scopus for various terms describing the access economy, it shows that almost all studies are published after 2009. This year is no coincidence, since it is often argued that the global financial crisis of 2009 is one of the drivers of the access economy (see for example Barnes & Mattsson, 2016; Hamari, Sjöklint & Ukkonen, 2015; Cohen & Kietzmann, 2014; Bardhi & Eckhardt, 2012). The most cited publication about the shift from ownership to access is the book *What's mine is yours: the rise of collaborative consumption*, written by Rachel Botsman and Roo Rogers (2010). The description of the access economy often refers to this and other publications of these authors.

In the next subsections, firstly the access economy and the potential role of incumbents is defined more precisely. Subsequently, the motivations of consumers and businesses to participate in the access economy are assessed.

2.1.1 Definition of access economy

As already described, in the access economy, people pay for access of a good instead of for the ownership of the good (Botsman, 2015). In other words, there is no transaction of ownership rights in the access economy, which differentiates it from traditional transactions. Frenken et al. (2015) provide a more specific definition of the access economy. They describe three features that specify the access economy. These features serve as the demarcation of this study.

The following three features define the access economy (Frenken et al., 2015):

1. transaction takes place between consumers;
2. temporary access, so no shift of ownership;
3. efficient use of physical consumer goods.

These features have several consequences. Firstly, only consumer-to-consumer transactions are included in this study. In other assessments of the access economy (or related phenomena such as the collaborative economy or the sharing economy), product service systems, also called business-to-consumer sharing, are often included as the object of study. In a product service system, businesses offer services that enable consumers to have access to products without owning them (Botsman & Rogers, 2010). However, since this is a business-to-consumer transaction and there is no mutual transaction between consumers, this system is not included in this study. Moreover, this study only focuses on physical consumer goods. Therefore, sharing of knowledge, skills or money are excluded from this study.

2.1.2 Transactions within access economy

Figure 2 and Figure 3 display the differences between a traditional transaction and a transaction within the access economy. In a traditional transaction, a producer sells a product to a consumer. The consumer receives the property rights of the good and pays a price to the producer.¹ In the access economy, consumers share goods with each other. In Figure 3, this is indicated by the transactions within the dotted box. The dotted box resembles the sharing platform, which enables the sharing between consumers. On the platform, consumers meet each other and the platform makes the sharing more convenient by offering additional services (for example secure payment and a review system). When consumers are sharing with each other, in most cases, at least one consumer owns the good. Therefore, there is also a traditional transaction. Another possibility is that businesses supply goods to the sharing platform. Lastly, businesses can act as a service provider to increase the convenience of the sharing platform (for example by offering insurances). All described relations can be regarded as possibilities for incumbents to participate in the access economy. The possible roles of incumbents are indicated with numbers in Figure 3.

Figure 3 identifies various actors in the access economy. Firstly, the businesses as described in the previous paragraph are actors in the access economy. These businesses can be both incumbents and start-ups. Moreover, consumers are important within the access economy. After all, they are sharing the goods with each other. For consumers, a distinction can be made between consumers on

¹ In this simplified model, it is ignored that there are also intermediate parties concerned in the transaction.

the supply-side and consumers on the demand-side. The role of consumers on the supply-side differs considerably from the role of the consumers displayed in Figure 2.

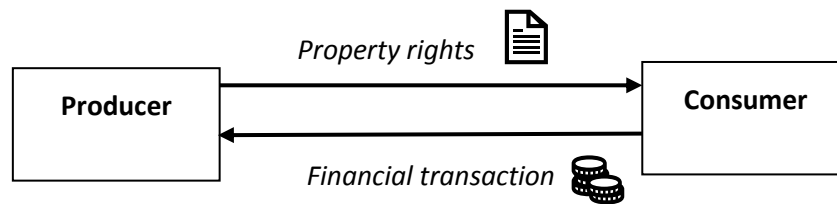


Figure 2: Traditional transaction.

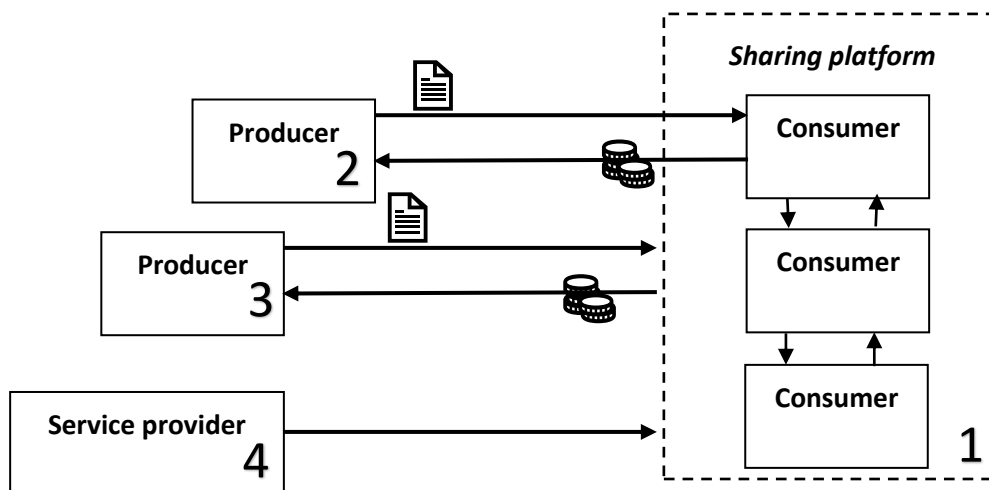


Figure 3: Transactions within the access economy.

2.1.3 Motivations of actors within access economy

In the following subsection, an overview of the literature regarding motivations to participate in the access economy is discussed. Botsman and Rogers (2010) define four conditions that drive the access economy:

1. **critical mass** – there is a sufficient number of adopters of an innovation, causing the innovation to become self-sustaining (see for a more elaborate discussion Ball (2005) and the theory about tipping points (Gladwell, 2006));
2. **idling capacity** – unused potential of goods when they are not in use;
3. **belief in the commons** – Ostrom (1990) shows that there are some success stories of groups managing resources themselves in common pool resource institutions (see Hartl, Hofmann & Kirchner (2015) for an application to the access economy);
4. **trust between strangers** – Ostrom (1990) argues that successful self-governance of the commons can emerge if the community is empowered with the right tools for coordination and monitoring. Botsman and Rogers (2010) note that sharing platforms enable transparent communities that are needed for the mentioned tools and create the necessary trust between strangers.

Consumers

The motivations (including both stimuli and barriers) of consumers to participate in the access economy are related to the described basic conditions. Firstly, Bardhi and Eckhardt (2012) show that the existing cultural norm that ownership equals well-being (the absence of a critical mass) impedes the access economy. A critical mass is also related to the convenience of the service, which increases the likelihood of people participating in the access economy (Barnes & Mattsson, 2016). The more people participate, the higher becomes the convenience of the services. Moreover, convenience is influenced by the extent to which people can trust and control each other; in other words, by the beliefs in the commons and the trust in strangers. Various empirical studies indicate that trust between strangers is a very important consideration for participation in the access economy (see for example Barnes & Mattsson (2016), Hartl et al. (2015), Möhlmann (2015), Philip, Ozanne & Ballantine (2015) and Bardhi & Eckhardt (2012)). Trust is especially important for supplying consumers within the access economy, so the consumers that rent out their goods. The importance of idling capacity is confirmed by an empirical study of Philip et al. (2015), which shows that people have an aversion to unused utility.

In addition to the motivations that are related to the underlying principles of Botsman and Rogers (2010), there are also more practical motivations, such as financial incentives and use values. Moreover, environmental concerns are a motivation for participation in the access economy (Meijkamp, 2000; Phipps et al., 2013; Hamari et al., 2015; Philip et al., 2015; Barnes & Mattsson, 2016). Though, these concerns only have limited influence and are often considered to be a bonus, outweighed by economic concerns (Katzev, 2003; Devinney, Auger & Eckhardt, 2010; Möhlmann, 2015). The practical motivations apply both to supplying and demanding consumers.

Businesses

Information about motivations of businesses to participate in the access economy is scarce. The available knowledge shows that the motivations of businesses are mostly cost-related (Shaheen, Meyn & Wipyewski, 2004; Van Lookeren Campagne & Borghuis, 2015). In addition, Schlange (2006) shows that businesses take environmental concerns into account. However, it should be noted that this knowledge is only based on the motivations of start-ups to participate in the access economy and not on incumbent businesses. Mont and Plepys (2007) provide a critical overview of the current scientific debate related to the area of sustainable consumption. This overview confirms the described knowledge gap that most studies focus on the motivations of consumers.

Since specific literature about businesses in the access economy is missing, it is interesting to study a broader range of literature about business motivations. Business motivations for sustainable entrepreneurship are consulted, since the participation in the access economy can be regarded as a

form of sustainable entrepreneurship. However, this range of literature shows that a considerable debate is going on about the motivations of businesses for sustainable entrepreneurship. In 1970, the neoclassical thinker Milton Friedman argued that the one and only social responsibility of a business is to increase its profits. In this economic model, environmental issues are only addressed with the purpose of self-interest (Barel & Pokharel, 2016). The neoclassical model was the base for the development of the discipline of economics and related fields (Vermeulen & Witjes, 2016).

Contrary to this neoclassical model, there are models in which attention is paid to other motivations and the role of businesses in the outside world. Businesses are operating in a fast changing outside world, of which the access economy is a good example. The changing world causes businesses to change their business processes (Lozano, 2007). It is currently argued that businesses can only continue to exist on the long term when they include an active concern for social and environmental issues in their business plans (Porter & Kramer, 2011) and regularly adjust their strategy (Vermeulen & Witjes, 2016). There is an emerging trend of businesses that move beyond optimising the organisation's individual performance by mitigating negative environmental and social impacts (Loorbach & Wijsman, 2013; Frenken, 2015; Vermeulen & Witjes, 2016). It should be noted that, although there is an active concern for the environment, businesses are still also driven by self-interest. So, the neoclassical model is not completely abandoned.

2.2 Strategic considerations of businesses

As mentioned, it is currently acknowledged that organisational change is often necessary to fit and survive within a changing environment. However, organisational change is difficult and even when incumbents understand the need to change, they are often unable to realise an effective change (Tripsas & Gavetti, 2000). In an influential paper, Tripsas and Gavetti (2000) argue that to understand the adaptation of incumbents to a changing environment, it is necessary to look at a firm's capabilities and the way managerial cognition influences the evolution and usage of these capabilities. Capabilities are the competencies, assets and resources of a business. Managerial cognition is defined as the worldviews and beliefs present within a business.

Eggers and Kaplan (2013) performed an extensive literature study about the interplay between cognition and capabilities. This study resulted in a recursive model about the interplay of cognition and capabilities (see Figure 4), consisting of three processes: the construction of routines – positive experiences are translated into routines; assembling capabilities – the routines become capabilities of the business; matching capabilities to the environment. The last process, indicated by the blue circles, is relevant for this study. The model assumes a changing environment (in this case the access economy) and subsequently businesses make an interpretation of the match between the changes and the

capabilities of the organisation. This interpretation, which is the managerial cognition, affects how the existing capabilities determine the strategic choice, so whether capabilities are adjusted, directly implemented within the new environment or not used at all. So, whether capabilities are deployed for the access economy depends on the one hand on the match between the capabilities and the access economy, and on the other hand on the interpretation of businesses whether there is a match.

Eggers and Kaplan (2013: p. 328) indicate that most useful results are obtained by studying one of the three processes of the model, remaining sensitive to the existence of the other processes within the model. In other words, in this study the focus is on the matching of capabilities to the environment, but it is acknowledged that capabilities are determined by experiences and routines (the first two blocks in Figure 4) and can change over time (dotted lines in Figure 4). Table 1 provides an overview of the factors influencing the interpretation of a match between capabilities and the environment and relatedly the incumbents' strategic choice. This overview is mainly based on the literature overview of Eggers and Kaplan (2013).

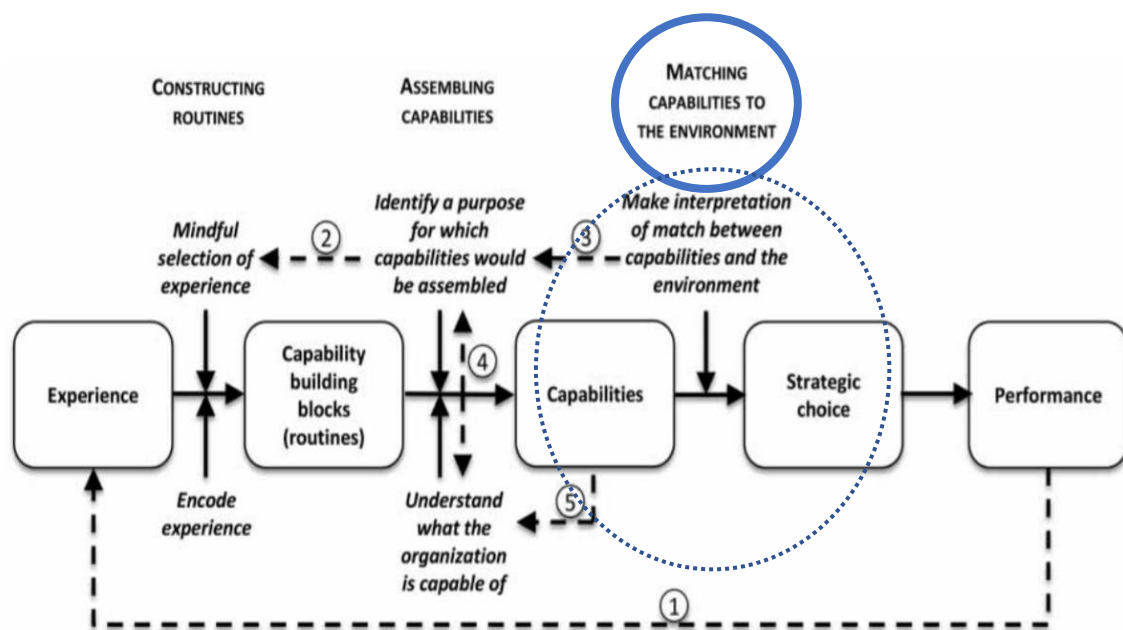


Figure 4: Model about cognition and capabilities (Eggers & Kaplan, 2013: p. 320).

Table 1: Factors influencing interpretation of capabilities and changing environment (Eggers & Kaplan, 2013: p. 313-314).

Factor	Influence	References
<i>Interpretation of changing environment – managerial cognition</i>		
Cognitive frame	Diagnosis of environment and prediction of necessary capabilities	Barr, Stimpert & Huff, 1992; Tripsas & Gavetti, 2000; Laamanen & Wallin, 2009
Identity/dominant logic	Lens through which potential matches between environment and capabilities are assessed	Prahalad & Bettis, 1986; Dutton & Dukerich, 1991; Bettis & Prahalad, 1995; Kogut & Zander, 1996; Zucker & Darby, 1997; Tripsas & Gavetti, 2000; Nag, Corley & Gioia, 2007; Tripsas, 2009; Gioia, Patvardhan, Hamilton & Corley, 2013
Attention	Focus of managerial attention affects strategic action	Barr et al., 1992; D’Aveni & MacMillan, 1990; Ocasio, 1997; Kaplan, Murray & Henderson, 2003; Cho & Hambrick, 2006; Kaplan, 2008; Eggers & Kaplan, 2009
Search process	Efforts to build new capabilities, based on analogies with existing knowledge	Tripsas & Gavetti, 2000; Gavetti, Levinthal & Rivkin, 2005
<i>Capabilities</i>		
Capabilities	Competencies, assets and resources of a business determine chosen strategies	Adner & Helfat, 2003; Jantunen, 2005
Business models	Models for value creation determine which opportunities are seen as viable	Tripsas & Gavetti, 2000; Chesbrough & Rosenbloom, 2002
Adjustment of capabilities and/or business models	Ideas about possibilities for reusing or repurposing existing capabilities and/or business models	Cattani, 2005; Dew, 2007; Danneels, 2011

2.2.1 Strategic considerations of businesses within access economy

As already mentioned, the access economy is in this study the changing environment. The model of Eggers and Kaplan (2013) and the identified influencing factors show that for participation in the access economy, there has to be a match between the existing business models and capabilities, and the business models and capabilities needed for the access economy. Moreover, the business has to acknowledge the match and act according to it. To study the strategic motivations of incumbents within the access economy, it is useful to identify the needed business models and capabilities in advance. However, as already noted, there is little literature about businesses in the access economy. Therefore, this overview is not exhaustive but serves as a guideline to identify the needed models and capabilities.

In order to determine the needed business models and capabilities for the access economy, the following description of a business model is used: “the essence of a business model is that it crystallizes customer needs and ability to pay, defines the manner by which the business enterprise responds to and delivers value to customers, entices customers to pay for value, and converts those

payments to profit through the proper design and operation of the various elements of the value chain” (Teece, 2010: p. 179). So, a business model should add value to the consumer and to the business itself. Both aspects will be discussed in the following subsections.

Value creation consumers

Teece (2010) notes that a business model has to respond to the wishes of consumers. Regarding the access economy, the wishes of consumers are formulated in subsection 2.1.3. Consumers are more likely to participate in the access economy when there is high convenience, a system that enhances trust between strangers and a financial incentive. To enhance convenience, businesses need the ability to act in an online environment with advanced information and communication technologies (Cohen & Kietzman, 2014; Denning, 2014; Matzler, Veider & Kathan, 2015). This capability is especially important for incumbents who want to set up a sharing platform (option 1 in Figure 3). The rise of the internet changed the features of the access economy (Frenken et al., 2015). The internet has enabled the emergence of worldwide networks in which people can collaborate with each other without knowing each other (Hamari et al., 2015; Belk, 2013; Botsman & Rogers, 2010: p. 71).

Secondly, a business needs the capability to generate trust. Trust can be generated by a strong brand reputation, which is a capability of an incumbent (PwC, 2015). Moreover, businesses can have the capability to offer insurances designed for the access economy, which is relevant for the role of service provider in Figure 3 (Denning, 2014). Lastly, businesses need the capability to produce and/or offer goods in such a way that it can be offered for a reasonable price within the access economy. To achieve this, it is often necessary that a business looks beyond simply delivering its goods (Denning, 2014; PwC, 2015). This capability is especially relevant for incumbents who offer products to the consumers and/or sharing platform (option 2 and 3 in Figure 3). In short, it is important that the incumbent has “sharp insight into the consumer mindset and competitive marketplace, as well as clarity into internal operations” (PwC, 2015: p. 30).

Value creation businesses

In addition to the value creation for consumers, it is important that a business model creates value for the incumbents themselves. In the existing literature, two paths in which business models can add value to the business are described: mission driven and profit driven. This distinction is also recognised in the discussion about business motivations in subsection 2.1.3. It should be noted that these two pathways are interconnected and reinforce each other. Participation in the access economy supports an incumbent’s environmentally friendly ethos (Matzler et al., 2015; PwC, 2015). Moreover, it enhances the visibility and the reputation of products, which in turn may increase the profits within the traditional markets (Matzler et al., 2015; PwC, 2015). For example, by offering goods on a sharing

platform (option 3 in Figure 3), consumers get acquainted with the product and the quality of the product. Moreover, by participating in the access economy, a business can reach a new target audience for their products (Matzler et al., 2015).

Business models

To create value for consumers and businesses with a business model that fits the access economy, businesses need several general capabilities. The businesses have to be innovative, flexible, creative and should never settle for stable (Cohen & Kietzman, 2014; Denning, 2014; Matzler et al., 2015; PwC, 2015). Table 2 provides an overview of possible business models and their added values. The overview is based on scientific literature, grey literature and examples from practice (Cohen & Kietzman, 2014; Denning, 2014; De Waij, 2015; Matzler et al., 2015; PwC, 2015). This overview is not a complete list of all possibilities and, of course, businesses might come up with new business models that fit within the access economy.

Table 2: Overview of possible business models access economy.

Business model	Value consumer	Value business
Launching a sharing platform – bringing consumers together who can share goods with each other (option 1, Figure 3)	<ul style="list-style-type: none"> • Higher convenience when there is a proper platform • Trust is enhanced by presence of a well-known brand 	<ul style="list-style-type: none"> • Service fee per transaction • Subscription • Improved reputation • Altruism • Advertising
Offering products to consumers within sharing platform (option 2, Figure 3)	<ul style="list-style-type: none"> • Higher convenience when more products are available • Trust is enhanced by presence of a well-known brand 	<ul style="list-style-type: none"> • Fee per transaction • Promotion of product • Improved reputation • Altruism
Offering products to sharing platforms (option 3, Figure 3)	<ul style="list-style-type: none"> • Higher convenience when more products are available • Trust is enhanced by presence of a well-known brand 	<ul style="list-style-type: none"> • Promotion of product • Fee per transaction • New target audience • Improved reputation • Altruism
Insurance – offering insurances within access economy (option 4, Figure 3)	Problems regarding trust between strangers are diminished	<ul style="list-style-type: none"> • Revenues from insurances • Improved reputation

2.2.2 Conceptual model strategic considerations

Based on the described literature, the idea that both cognition and capabilities determine incumbents' strategic choices and the model formulated by Eggers and Kaplan (2013), a conceptual model is formulated that is used to answer the first part of the research question (see Figure 5). The concepts in the model are operationalised in the methodology section of this paper.

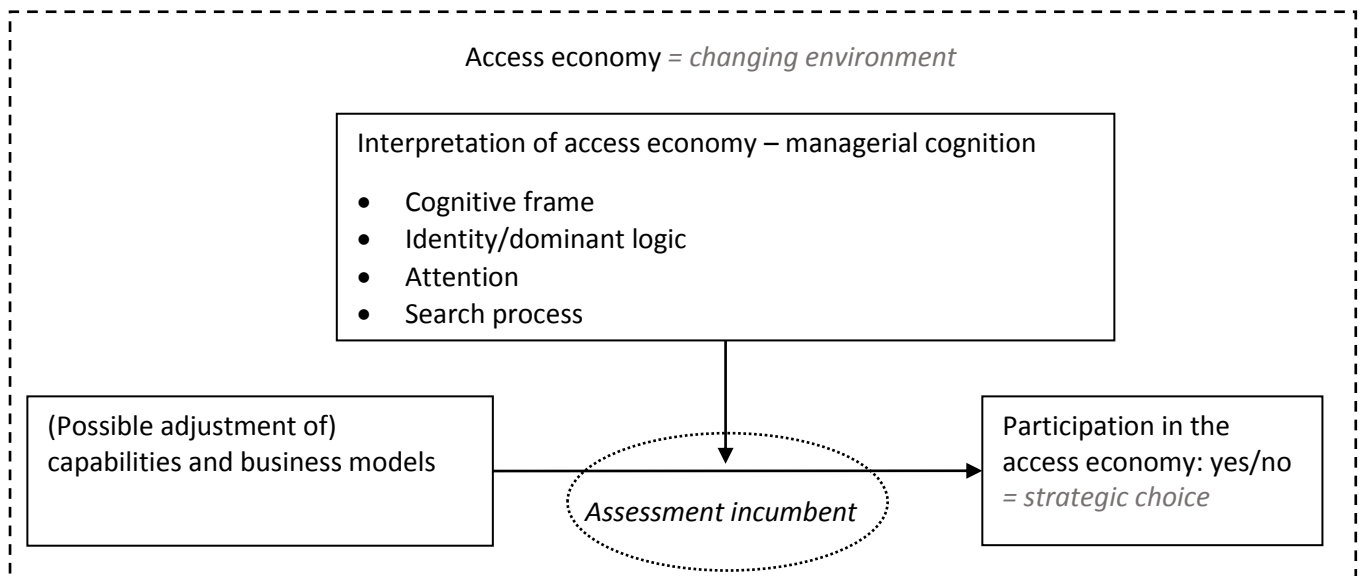


Figure 5: Conceptual model of strategic considerations.

2.3 Role of the government

In the next paragraph, the literature necessary to answer the second part of the research question, how the government can stimulate incumbents to enter the access economy, is discussed. Literature and experts about the access economy acknowledge that government regulations can both help to promote and impede the access economy (Bardhi & Eckhardt, 2012; Boot, 2013; Metz, 2013; Allen & Berg, 2014; Le Vine et al., 2014; Van Lookeren Campagne & Borghuis, 2015; Barnes & Mattsson, 2016; Miller, 2016). In addition to specific regulations, the government can play a role in the promotion of the cultural values needed for the access economy and the creation of awareness, which coincides with the discussed importance of a critical mass (Moeller & Wittkowski, 2010). Lastly, Katzev (2003) emphasises the importance of collaboration between the public and private sector for the access economy.

In order to study the role of the government, literature about governance modes will be used. Governance is a popular term in the current literature about the role of the government. However, the definition is not always clear. In this study, governance refers to self-organising, inter-organisational networks that complement markets and hierarchies as governing structures (Rhodes, 1996: p. 652). Applied to the access economy, this implies more interaction between incumbent businesses and the government. Following Lange (2016: p. 51), a governance mode is defined as an “encompassing governance arrangement”. The term governance arrangement is derived from the term policy arrangements, which is “the temporary stabilisation of the content and organisation of a particular policy domain” (Arnouts et al., 2011: p. 44-45). The difference between a governance and a policy arrangement is that in a policy arrangement more attention is given to the content. By using the

literature about governance modes as a conceptual framework to study the role of the government, the current role can be analysed and needs for shifts can be identified (Hysing, 2009; Arnouts et al., 2011 & Driessen et al., 2012). Arts et al. (2006: p. 104) also indicate that the model can be used to identify possibilities for policy improvement.

2.3.1 Conceptual framework

The conceptual framework consists of a synthesis of four different models of governance modes that are used in the analysis of environmental policies (see Lange (2016) for a comparable combination of the different models). It is useful to combine multiple models, since the concept of governance and more specifically governance modes is very complex (Lange, 2016: p. 51).

The chosen models differ on two aspects. Firstly, the models identify different dimensions or features to measure the governance modes and secondly, different governance modes are identified. Although there is overlap between the models, they all offer valuable tools for the analysis of the current policy regarding the access economy and the ways to improve the role of the government. Table 3 provides an overview of the relevant dimensions of the models. The dimensions are the features of a policy that determine the governance mode.

Table 3: Overview of dimensions.

Hysing (2009)	Arnouts et al. (2011)/Arts et al. (2006)²	Driessen et al. (2012)
Public-private relationships	Actors and their coalitions	Actor features: <ul style="list-style-type: none"> - initiating actors - stakeholder position - policy level - power base
Policy levels		
Governing instruments and styles	Power and influence	Institutional features: <ul style="list-style-type: none"> - model of representation - rules of interaction - mechanisms of social interaction
	Rules of the game	
	Policy discourses and programmes	Features content: <ul style="list-style-type: none"> - goals and targets - instruments - policy integration - policy science interface

² The models of Arnouts et al. (2011) and Arts et al. (2006) are already combined in this proposal, since the first one is based on the model of Arts et al. (2006). Arnouts et al. (2011) provide a clear description of the governance modes, while Arts et al. (2006) describe the features of a governance mode.

This study is interested in the type of policy the Dutch government executes regarding the access economy and how the policy can be improved. Therefore, the features, which determine the type of policy, are studied in this research. Arts et al. (2006) and Arnouts et al. (2011) emphasize that change in a governance mode is caused by a change in any of the features. Since all features are interrelated, a change in one of them leads to changes in the other features (Arts et al., 2006). It is important for the recommendations to acknowledge the interrelations between features and to have an overview of the current policy with respect to all features.

The features of Driessen et al. (2012) serve as a base for the conceptual model, since these authors provide the most detailed overview of relevant features. These features are complemented with features of Arts et al. (2006), since they pay more attention to the interplay between the features and to the content of the policy. The features of Hysing (2009) show a lot of overlap with the other studies, and are therefore mainly used for the operationalisation of the concepts.

Actors and their coalitions

The first set of features is related to actors and coalitions. The features are briefly described in this section and will be operationalised in the methodology section. Firstly, the *initiating actors* are the key actors that initiate action and specify the policy ambitions. The initiating actor can be a government on various levels or civil society actors, for example incumbent businesses. After the policy is initiated, stakeholders can take different positions in the policy-making process. The level of involvement of relevant actors in the policy process is called the *stakeholder position*. Subsequently, groups of relevant actors might work together to achieve a certain goal in *actor coalitions*. The last relevant feature related to actors and their coalitions is the *power base*, which is the basis for the influence that actors have on the policy process. Examples of bases of power are coercion, authority, knowledge and social capital.

Institutional factors

The second group of features deals with institutional factors, which are related to the rules, norms and values in an organisation or process. The first feature is the *model of representation*, which is the relationship between public and private actors in a society and the way actors can exercise influence. In literature, three models can be distinguished: elections and lobbying (pluralism), formalised public-private government arrangements (corporatism) and participatory public-private government arrangements (partnership). The second feature, *rules of interactions*, is related to the model of representation and consists of the (in)formal rules that determine the relationship between the relevant actors. Lastly, the *mechanisms of social interaction* are a relevant feature. This feature

indicates whether the decision-making process is top-down, interactive or bottom-up. This feature is highly interrelated with the initiating actors.

Content

The last group of features is the content of the policy-making process. The starting point of every policy are the *goals and targets*. Relevant is whether the goals and targets are uniform or tailor-made. Thereafter, *instruments* are chosen, which can be divided into different types (command-and-control, incentive-based, information and voluntary agreements). The choice for goals and instruments is determined by the division of policy over different levels (i.e. national and local) and sectors (i.e. different ministries), the *policy integration*. Lastly, the *policy science interface* influences the choice for a policy. Generic or issue specific knowledge can be used, derived from laity, experts or both.

The identified features are used to analyse the access economy policies and to draw a comparison between the wishes of the incumbents and the current policy. The features provide a guideline for the policy analysis.

3 Methodology

The previous chapter outlined the theoretical models that are used to answer the research question of this study and to formulate recommendations to the Dutch government. The following section describes the methodology used to answer the research questions. The study starts with two separate lines of research, which are subsequently confronted with each other (see Figure 6). The gathering of the empirical data and the way theory and empirical data are confronted with each other are described in the following subsections. In addition, the confrontation of the role of the Dutch government and incumbents' strategic considerations is discussed in this chapter.

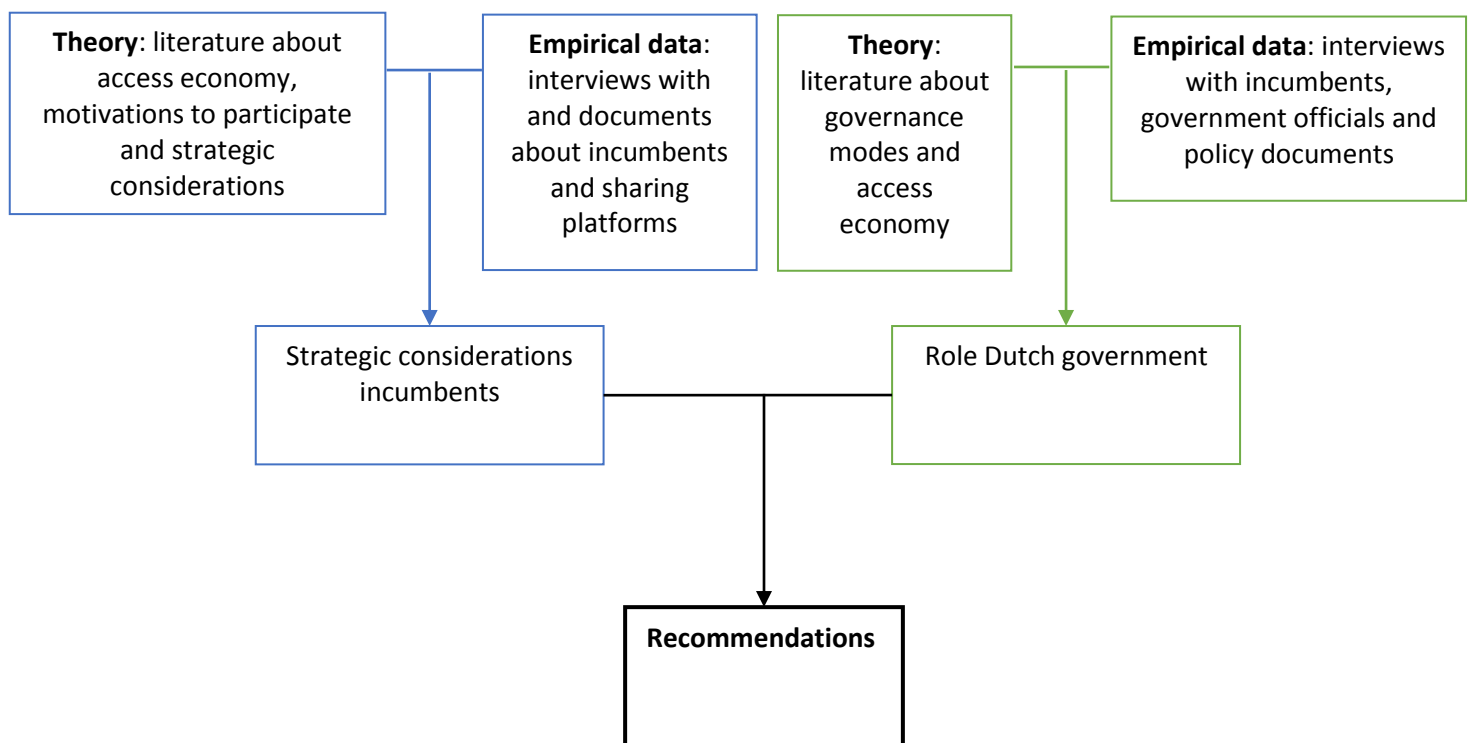


Figure 6: Outline two lines of research.

To answer the research question, interviews are conducted and documents are studied. By using multiple data sources, the reliability of this study is enhanced (Van Thiel, 2010). Key players within the incumbent businesses and the relevant Dutch ministries are interviewed in face-to-face interviews. The document analysis consists of studying documents of the businesses, such as mission statements, press releases and year reports to obtain more objective information about both the business and motivations of the business. In addition, policy documents are studied to assess the role of the government. Appendix 1 provides an overview of the data sources for each sub-question. The data sources are discussed in more detail in the following subsections.

3.1 Empirical data incumbents' strategic considerations – multiple case study

There is no solid literature base about the motivations and considerations of businesses to enter the access economy and the theoretical model is based on different stances of literature. Therefore, this study is to a large extent an explorative research. For the exploration of strategic considerations, a case study is most suitable. By using a case study, a profound and holistic insight into the motivations, considerations and experiences of businesses can be gained (Verschuren & Doorewaard, 2010). A disadvantage of a case study is a limited external validity, because of the limited number of studied cases. By providing an extensive description of the used methodology, the replicability of this study is increased.

A multiple case study is performed in which multiple, heterogeneous cases are studied. To acquire a good overview of the strategic considerations of incumbents, both participating and non-participating businesses are studied. A heterogeneous case study design with both participating and non-participating businesses is relevant since this study assesses the strategic considerations of businesses to participate or not to participate. Both considerations offer interesting insights that can be used for the recommendations to the Dutch government. The cases differ on two extents from each other: they display various ways for a business to participate in the access economy (see Figure 3) and represent sectors with different types of goods considering price and durability.

To identify the businesses that are not (yet) participating in the access economy, but for whom the access economy might be relevant, various groups of businesses are created, all representing a sector. For every participating business, comparable non-participating businesses are studied. To enlarge the amount of cases, a participating business can also be a foreign business. These cases are not used for the case study, but serve as a tool to identify relevant Dutch non-participating businesses. Since the units of analysis (the businesses) are studied within larger entities (sectors), this study is an embedded case study (Yin, 2013). In the selection of the cases, the three features of the access economy as defined by Frenken et al. (2015) are used as a guideline (see subsection 2.1). In total, four cases (sectors) and more specifically eleven units of analysis (businesses) are studied in a multiple case study: five participating incumbents and six non-participating incumbents. The information about the fashion sector and home improvement and garden sector is complemented by interviews with a consultancy agency specialised in sustainability within fashion brands and the branch organisation of garden centres. Table 4 provides an overview of the studied cases.

Table 4: Overview of studied cases.

Example sharing platform	Possible role of incumbent	Participating businesses	Non-participating businesses
Sector I: Yachts sector			
Barqo: consumer-to-consumer boat sharing platform	Yacht building companies promote Barqo among their buyers by providing easy access to platform (option 2, Figure 3)	<ul style="list-style-type: none"> Linssen Yachts 	<ul style="list-style-type: none"> Holiday Boatin Doerak Sneek Jachthaven Meppel
Case II: Automotive sector			
CarUnity (Germany): consumer-to-consumer car sharing platform launched by General Motors/Opel Germany	Car manufacturing companies launch consumer-to-consumer car sharing platforms (option 1, Figure 3)	<ul style="list-style-type: none"> Pon Auto Hoogenboom 	<ul style="list-style-type: none"> General Motors/Opel Netherlands
Case III: Home improvement and garden sector			
Streetbank: consumer-to-consumer sharing platform supported by B&Q	Stores launch consumer-to-consumer sharing platforms (option 1, Figure 3)	<ul style="list-style-type: none"> B&Q – UK’s leading home improvement and garden living retailer (UK) – <i>Not used as a case study</i> 	<ul style="list-style-type: none"> Warentuin Eco-logisch Extra: branch organisation garden centres
Sector IV: Fashion sector			
LENA Fashion Library: consumer-to-consumer fashion sharing platform	Sustainable fashion labels bring in clothes to fashion library (option 3, Figure 3)	<ul style="list-style-type: none"> Alexandra Frida Pulp 	<ul style="list-style-type: none"> Joline Jolink Extra: GW Agency

3.1.1 Case study protocol

For each case, the results are based on the analysis of the units within it. In the theoretical framework, a conceptual model of business motivations is developed. In the case studies, all elements of the conceptual model are studied. The elements serve as a guideline of topics that are studied in the case study analysis. For every sector, the following questions are answered:

- 1. What are the main characteristics of the sector?**
- 2. What are businesses within the sector currently doing with respect to the access economy?**
 - The role of the incumbent as identified in Figure 3.
- 3. What are the main characteristics of the studied businesses?**

4. In what way do the incumbents interpret the access economy?

- Perception of necessary conditions access economy: critical mass, idling capacity, belief in the commons, trust between strangers.
- Four features of managerial cognition identified in theoretical framework: cognitive frame, identity/dominant logic, attention, search process.

5. To what extent is and was the business able to participate in the access economy?

- Existing capabilities and business models.
- Adaptation of capabilities and business models.

6. What is the role of service providers regarding the access economy?**7. What is the role of the Dutch government regarding the access economy?***Data collection*

As already mentioned, interviews and documents are used within the case study. In addition to the interviews with the incumbents and organisations displayed in Table 4, personal interviews are conducted with consumer-to-consumer platforms. For the first three questions, interviews with the incumbents, extra organisations and sharing platforms are used to obtain a good overview of the sector, its developments and the incumbents within it. This information is further complemented with public documents and documents supplied by the respondents. The answers on question 4, 5 and 7 are mainly based on the interviews with the incumbents, as well as the branch organisation and GW Agency. The information necessary for question 6 is derived from the interviews with the incumbents and from interviews with two insurance companies.

All questions are complemented with both sources of information. Interviews are necessary since the questions are subjective in how the business perceives or interprets the access economy and their position in it. This information is often not fully captured in documents. The interviews have been semi-structured because of the explorative character of this study. The questions are based on the conceptual models, but there is room for extension. The internal validity and the reliability, in other words the replicability of this study, are enhanced by having predefined sensitising concepts that guide the data collection. Appendix 2 provides an overview of this study's respondents.

Data analysis

After the collection of the data, the data are analysed using an operationalisation of the key concepts (see Table 5). The coding of the interviews and documents consisted of two phases. Firstly, the data are coded using open coding, in which the data are compared, labelled and classified. The labels are the predefined key concepts. Subsequently, axial coding is used to specify the findings. The axial coding is based on the indicators and values defined in Table 5.

Table 5: Operationalisation of conceptual model business motivations.

Feature	Definition	Indicators and values
Access economy (=changing environment)		
Critical mass	Sufficient number of adopters of access economy	Incumbents interpretation of critical mass
Idling capacity	Unused potential of goods when they are not in use	Incumbents interpretation of idling capacity
Belief in commons	Groups managing resources themselves	Belief of incumbents that groups can manage resources themselves
Trust between strangers	Available tools to coordinate and monitor collaboration between people who do not know each other	Incumbents interpretation of presence trust between strangers
Interpretation of the access economy		
Cognitive frame	Interpretation of access economy and what actions should be taken	<ul style="list-style-type: none"> • Interpretation of access economy (see conditions access economy) • Interpretation of actions that should be taken
Identity/dominant logic	Way in which managers together conceptualise business and its capabilities, and make resource allocation decisions to match the business with the access economy	<ul style="list-style-type: none"> • Interpretation of match between business's capabilities and access economy • Presence of shared identity within business
Attention	Degree to which business focuses on access economy, possible match with capabilities and needed adjustments	Scale to indicate presence of attention for access economy
Search process	Exploratory actions for strategies regarding access economy, based on earlier experiences	<ul style="list-style-type: none"> • Presence of exploratory actions • Presence of experiences with changes comparable to access economy
Capabilities		
Capabilities	Competencies, assets and resources of a business	By incumbents identified capabilities that fit or do not fit access economy
Business models	Models for value creation within business	By incumbents identified business models that fit or do not fit access economy
Adaption of capabilities	Capabilities are directly amenable, reused or recombined in different settings than they are designed for	Scale to indicate possibilities of usage of capabilities and needed actions
Adaption of business models	Business models are directly amenable, reused or recombined in different settings than they are designed for	Scale to indicate possibilities of usage of business models
Participation in the access economy (=strategic choice)		
Participation	Incumbents set up an initiative to involve themselves in access economy	Presence of participation within access economy

3.2 Empirical data role Dutch government – policy analysis

The second part of the research question, assessing the role of the Dutch government, is answered by systematically analysing policy documents using the conceptual framework that is based on the literature about governance modes. The starting point of the analysis is an overview of the current practices, indicating policy directions, actors and relevant programmes. Subsequently, it is studied how Dutch policy fits within the conceptual framework.

The overview is created by searching websites of the Dutch government. Firstly, the website on which parliamentary documents are published (www.officielebekendmakingen.nl) is searched for the term ‘*deeleconomie*’. Subsequently, the general website of the government (www.rijksoverheid.nl) is searched for the same term. The documents found include letters from the relevant ministers, debates, explanation of policies, evaluations, assessments of European proposals and research reports. Lastly, relevant documents are identified during the analysis of the documents found on the websites. After the creation of an overview, the documents are analysed based on the operationalisation of the identified features (see Table 6).

In addition to the document analysis, two face-to-face interviews with representatives of the Dutch government are conducted to clarify the results obtained by the document analysis. More specifically, one representative for each of the two relevant ministries – Ministry of Infrastructure and Environment and Ministry of Economic Affairs – is interviewed. Lastly, the information is complemented with incumbents’ and sharing platforms’ experiences with the government. This way, knowledge about the present policy and the motivations behind this policy can be obtained.

Table 6: Operationalisation of features governance modes.

Feature	Definition	Indicators and values
<i>Actors and their coalitions</i>		
Initiating actors	Key actors initiating action and specifying policy ambitions	Policy is initiated at a supranational level, by (central) government agencies, private sector and/or civil society
Stakeholder position	Level of involvement of relevant actors in policy process	Scale from no involvement to an equal role for all actors
Actor coalitions	Group of relevant actors that work together to achieve a certain goal	<ul style="list-style-type: none"> • Number of coalitions • Presence of private and public actors in coalitions
Power base	Basis for influence of actors on policy process	Power is based on coercion, authority, legitimacy, autonomy, trust, social capital and/or knowledge
Power of actors	Relative resources of public and private actors vis-à-vis each other	Power is centred at public and/or private parties

Policy level	Predominant level of policy making at which key actors operate	Scale from international to local level and mixes between levels
<i>Institutional</i>		
Model of representation	Relationship between public and private actors in governing society	Actors can exercise influence via: <ul style="list-style-type: none"> • elections and lobbying (pluralism) • formalised public-private government arrangements (corporatism) • participatory public-private government arrangements (partnership)
Rules of interaction	Formal and/or informal rules that determine relationship between relevant actors	<ul style="list-style-type: none"> • Formal or informal rules • Imposed or self-crafted rules
Mechanisms of social interaction	Direction of decision-making process	Decision-making process is top-down, interactive or bottom-up
<i>Content</i>		
Goals and targets	Uniformity of policy objectives and specification of these objectives	Scale from uniform to specific, tailor-made goals and targets
Instruments	Type of instruments that are predominantly used for policy implementation	Types of instruments: <ul style="list-style-type: none"> • command-and-control • incentive-based • information • voluntary agreements
Policy integration	Division of policy over levels and sectors	Policy is divided over policy levels and/or policy sectors, or there is no division
Policy science interface	Type of knowledge that is used for different stages in policy-making process	Important knowledge in policy-making process: <ul style="list-style-type: none"> • generic knowledge • issue and time-and-place specific knowledge • expert knowledge • lay knowledge

3.3 Confrontation of results

After the description of the four cases and the role of the government, the results of the four cases are compared with each other to obtain a general overview of the strategical considerations of incumbents. Subsequently, the strategical considerations and the perceived role of the government by the incumbents are confronted with the actual role of the Dutch government. The results of both analyses are compared with each other. In the last phase, the analysis is compared with the theoretical framework. In the conclusion, recommendations to the Dutch government are formulated based on the two analyses and the confrontation of the results.

4 Case descriptions

The following chapter provides case descriptions of the four studied sectors. For each sector, the most relevant developments and the operating sharing platforms are briefly discussed. Subsequently the studied incumbents and their possible roles within the access economy are described. This description is based on Figure 7 (see also Figure 3 in subsection 2.1.2). The interpretation of the access economy and the strategical motivations of the incumbents are the core of this section. In addition, the role of service providers within each sector and the role of the government is assessed. Subsection 4.5 provides an overview of the incumbents' strategical considerations within the different sectors.

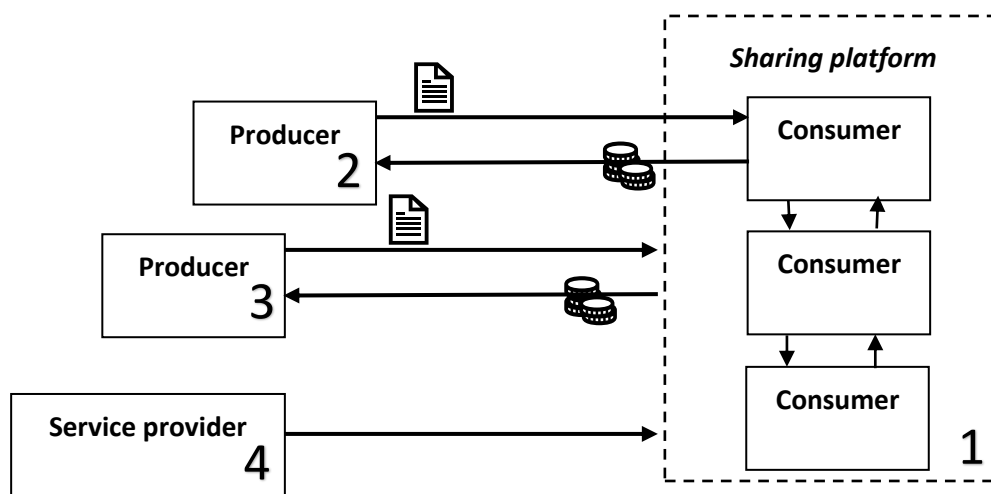


Figure 7: Transactions within the access economy (see also Figure 3).

4.1 Case I: Yachts sector

The yachts sector is the first case study used to identify incumbents' strategical considerations. A yacht is a luxury good with a long lifetime. With proper maintenance, a yacht can easily be used for more than thirty years. Since a yacht is a luxury good, the financial crisis of 2009 has had a major impact on the sector and the sale of yachts dropped. Traditional manufacturers needed to look for other business models within the sector, since the traditional business model of sales was no longer profitable. Another problem, related to the fact that a yacht is a luxury good, is the aging of the buyers. The aging of the sector withholds renewals.

Traditional yacht manufacturers responded in several ways to the tensions in the sector. One new business model which is close to the access economy as studied in this research is business-to-consumer sharing. The incumbents started with offering a traditional rental service. Because of the

high purchase price, people are interested in renting a yacht. In the last years, also consumer-to-consumer sharing has become increasingly popular, resulting in Barqo, an online consumer-to-consumer sharing platform. Barqo is a Dutch start up and was founded in 2014. Meanwhile, Barqo has 6.000 users and 8.000 suppliers of boats. Via Barqo, yacht owners can share their yachts whenever they want to. They can do this with or without a skipper and determine the price by themselves. The demand-side of the platform faces a unique broad supply of yachts. Moreover, the prices are significantly lower than in a traditional rental market. According to one of the founders, the reason behind Barqo was mainly a drive to set up a new business. The founders experienced that it was often difficult to rent a yacht. They expected that a consumer-to-consumer platform would solve this problem. Other, less important, motivations for the foundation of Barqo were the drive to bring people together and the reduction of the production of yachts.

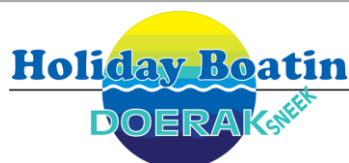
To stimulate the usage of the platform, Barqo has set up several partnerships with incumbents. The incumbents fulfil several roles. Firstly, there is a cooperation with insurance company Centraal Beheer. Centraal Beheer fulfils the role of service provider (option 4 in Figure 7) and will be discussed in more detail later in this section. To promote the supply of yachts on the platform, Barqo established a partnership with the website www.botentekoop.nl at which sellers can easily choose to offer their yacht they want to sell on Barqo to share it with others. Thirdly, Barqo cooperates with Linssen Yachts, a yacht manufacturer that promotes the usage of Barqo among its clients.

Since this study focuses on the strategical considerations of traditional incumbents, the partnership with Linssen Yachts has been studied in more detail. This is done by studying the motivations of Linssen Yachts and comparable incumbents that do not participate in the access economy. In addition to Linssen Yachts, two incumbent yacht manufacturers are studied: Holiday Boatin Doerak Sneek and Jachthaven Meppel, the producer of the Drentsche Kotter. Both incumbents are not (anymore) participating in the access economy. In addition to the information retrieved from the incumbents, a personal interview with the founder of Barqo is used to develop an idea about the sector and to the considerations of incumbents.



Family business – second and third generation

Luxury yachts and sharing platform



Family business – first and second generation

Luxury yachts and rental services



Family business – first generation

Luxury yachts, repair and maintenance

Yacht manufacturers can participate in several ways within the access economy. Firstly, incumbents can create their own sharing platform. This is for example done by Linssen Yachts. In addition to the cooperation with Barqo, Linssen Yachts has set up a worldwide online platform by itself. Holiday Boatin Doerak Sneek also provided the service of a sharing platform for their buyers in the past. On these sharing platforms, buyers of yachts are stimulated to share their property in a structure in which the client buys a yacht and the business offers a complete programme in which it arranges everything necessary for rental. Referring to Figure 7, the incumbent fulfils the roles displayed by number 1 and 2. It is also possible that a yacht manufacturer only fulfils the role of producer (2 or 3) and promotes sharing among its clients.

4.1.1 Interpretation access economy

To understand the strategic considerations of incumbents, the first step is to identify whether the incumbents experience a changing environment. The changing environment is in this case the access economy and the conditions necessary for the shift from ownership to access. In the yachts sector, one is highly aware of a changing environment. As already mentioned, the sector faces a serious decrease in sales. Therefore, the studied incumbents are aware that something has to change in their business model to adjust to this changing environment. However, they experience considerable problems regarding the access economy.

Firstly, incumbents believe that there are not enough people willing to share their yacht. A yacht is not a standard product and because it is a very personalised good, people are unwilling to share it with others. When businesses have a rental service, they standardise everything, but private owners would like to add a more personal touch to their yachts. Moreover, yachts are often a big investment for private owners. Jachthaven Meppel states that this is one of the reasons why people do not want to share it with others. On the other hand, Holiday Boatin Doerak Sneek argues that buyers want to earn back their investment by renting it to others. The profitable side of sharing is also acknowledged by Linssen Yachts and Holiday Boatin Doerak Sneek experienced that money was a very important driver for people.

The experienced absence of a critical mass has mostly to do with a lack of trust between strangers and the absence of the belief in the commons. Consumers who want to have access to a yacht often forget that it might be difficult to navigate, which can result in dangerous situations. This is a barrier for consumers to share their yacht, but also for incumbents. The studied non-participating incumbents indicate that they feel highly responsible for what happens on the water. That the worries about safety on the water are not unjustified shows an accident with one of the yachts of Holiday Boatin Doerak Sneek. In 2013, one of their yachts was involved in an accident with a freighter. In this

accident, the two occupants passed away. This accident has had a tremendous impact on the business, although the police concluded that they were in no way responsible.

The problems regarding safety are enhanced by the fact that a shipping license is for most yachts not required and if it is required, it contains only theory. This distinguishes the sharing of yachts from the sharing of cars. A driver license offers more certainty about one's capacities than a shipping licence. There is a surprisingly difference between the participating and non-participating incumbents regarding the requirement of a shipping license. The two non-participating businesses experience the deficits of a shipping license as an important problem. On the other hand, it is a selling point for Linssen Yachts. On their website, they present it as an advantage that one does not need a license to rent a yacht. Barqo solved the problem of safety by offering the possibility to rent a yacht with a skipper. However, the incumbents indicate that consumers do often not want this.

Related to a lack of trust, the incumbents do not believe that a group is able to deal with this kind of problems. Firstly, everybody has different norms and values. Therefore, usage that one regards as careful might be unacceptable for others. The differences in norms and values also decrease the value of reviews. Despite of these problems, the incumbents do believe that it is possible that people buy a yacht together and share the ownership.

The last condition of the access economy is the presence of an idling capacity. Although yachts are unused most of the time, the access economy is not a solution. Both supplying and demanding consumers want to use the yacht at the same time: during the weekends and holidays and especially when the weather is good. Therefore, the incumbents do not regard this as a present condition. Barqo has a slightly different interpretation, which is conceptualised in the cooperation with www.botentekoop.nl. Barqo does experience an idling capacity, since there are many yachts on sale that are unsold and unused and can be shared with others.

4.1.2 Strategic considerations

Managerial cognition

Several features are important to understand incumbents' strategic considerations. Firstly, the cognitive frame of incumbents determines whether an incumbent might participate in the access economy. As described in the previous section, the studied businesses experience the access economy as an interesting concept. Moreover, they acknowledge that changes are necessary because of a changing environment. The financial crisis of 2009 underlines the importance of change. The attention among incumbents for the access economy is high. However, they also encounter major problems regarding the access economy, which have mainly to do with a lack of trust between strangers and

responsibility. The perceived urge to change together with the problems regarding the access economy, shape the incumbents' cognitive framework.

The extent to which incumbents participate in the access economy also depends on the identity and dominant logic within a business. The three studied businesses are all relatively small family businesses. The participating incumbent is the largest business. A couple of years ago, Linszen Yachts decided to increase their scale and to produce more standardised yachts, which changed the identity of the business since it became more large scale and less personal. On the other hand, for the two non-participating businesses, customised yachts and human attention are very important for their identity. The access economy is discussed in a constructive way without considerable disagreements within the incumbents. Although the access economy is discussed by the incumbents, their ideas about it are often not very concrete.

The last feature identified in literature is the search process of incumbents. Holiday Boatin Doerak Sneek has experiences with the access economy. However, because of these experiences the business states that it does not want to participate in the access economy anymore. Especially the accident in 2013 has contributed to this decision. Holiday Boatin Doerak Sneek has shown that it is actively looking for ways to adjust itself to the changing environment. A good example is an experiment with electric yachts. However, this exploration turned out to be not as successful as they expected. The incumbent's experiences with (sustainable) adjustments to the changing environment are impeding their participation in the access economy. The other non-participating incumbent does not have any experiences with adjustments to a changing environment and does not exert concrete search activities. On the other hand, the participating incumbent has positive experiences with adjustments to a changing environment in the past, since the standardisation of their yachts turned out to be very successful.

Capabilities

As described in the theoretical framework, an important capability for the access economy is the ability to act in an online environment. The two non-participating incumbents do not have this capability. Both incumbents argue that the human and personal dimension are very important for their business. For the businesses, it is the reason why they enjoy their work so much. Moreover, Holiday Boatin Doerak Sneek argues that the problems regarding trust between strangers is enhanced by only using an online platform. Thus, the incumbents do not have and do not want to attain this capability.

Secondly, the incumbents need the capability to produce yachts in such a way that it can be offered for a reasonable price in the access economy. The two studied non-participating incumbents produce customised yachts in a high segment. The yachts are not very suitable for the access economy.

The participating incumbent has made the transition towards more standardised yachts that are produced at a larger scale and are also more suitable for the access economy.

Lastly, it is useful for the access economy when a business is able to generate trust. Since the incumbents have a reputation of producing ships of a high quality and are experienced in the maintenance of these ships, they have this capability. Moreover, Holiday Boatin Doerak Sneek already has experience in renting out its own yachts.

Business model

Incumbents can participate in the access economy in several ways (see Figure 7). The setting up of a sharing platform is a completely different business model than the sale and production of yachts. Though, it is not very different from renting out yachts as a business, which is already done by some incumbents. A problem might be that the sharing economy causes cannibalism since people are renting a yacht instead of buying it. Though, the incumbents indicate that the consumers that want to have access do not want to have ownership. A disadvantage because of this is that the value for a business of becoming a well-known brand also disappears.

The types of yachts the incumbents produce is also an important feature of the chosen business model. As already indicated, the production of customised ships is not suitable for the access economy. Although the incumbents are willing to change their business model and see the necessity to do so, this is not always possible. When the incumbents change their business model, this is mostly driven by an incentive of generating profits. Although, the studied incumbents do indicate that they consider the access economy as a good sustainable development.

4.1.3 Role service providers

Barqo enables sharing among consumers. Moreover, it takes away certain barriers, such as the lack of trust between strangers. Firstly, trust between strangers is enhanced by a review system. Moreover, in cooperation with Centraal Beheer, Barqo offers an insurance programme. Barqo has chosen for this partnership since it experienced that reliability issues acted as an important barrier for their customers. Centraal Beheer also acknowledges that they are able to offer a solution to trust related problems. However, insurance companies also mention that they cannot solve all the problems and that the platforms also have a responsibility in the generation of trust between their consumers. In addition, platforms can reduce risks by creating save routes for their users. These routes avoid for example canals with many cargo ships.

The solutions offered by an insurance company are not experienced as solutions by the incumbents. Firstly, they argue that material damage is often not the problem and can easily be fixed. It is the responsibility you have for other's wellbeing that is problematic and that cannot be insured.

Secondly, owners are often more careful with their yachts than temporary users. Although this less careful usage does not always result in damage that can be reported to the insurance company, there will probably be usage damage.

4.1.4 Role Dutch government

All studied incumbents and Barqo indicate that the only role of the government is to remove impeding regulations. Besides that, the access economy should completely be established by the market. The access economy is impeded by the deficits of a shipping license, so this is something the government could solve. Barqo indicated that also local governments can stimulate the access economy by the removal of certain regulation. Local legislation was obsolete, but is currently changing. Especially legislation about operating licenses and whether it is allowed to rent a yacht with a skipper was problematic for Barqo. The changes in the legislation are established under influence of lobbying activities of organisations as Barqo. On the other hand, Holiday Boatin Doerak Sneek experienced that it is often difficult to change policies at a higher government level.

4.1.5 Sub-conclusion Case I: Yachts sector

The incumbents within the yachts sector acknowledge that they operate in a changing environment. The sale of yachts has decreased and therefore, it becomes difficult for incumbents to continue their traditional business model. However, the incumbents experience several problems regarding the access economy and therefore do not believe in the existence of a critical mass. The identified problems have mostly to do with the lack of trust between strangers.

In addition to the problems regarding the access economy, the incumbents do often not have the capabilities needed to participate in the access economy. Firstly, the access economy demands the capability to operate in an online environment and the incumbents do not possess this capability. Moreover, the produced yachts are often not suitable for the access economy, since they are too personalised. Although the incumbents do not have the necessary capabilities, the business model is not completely new for the incumbents, since they often offer a traditional rental service to their customers already. The business model for the access economy does differ considerably from the traditional business model of sales.

4.2 Case II: Automotive sector

A car is often the largest investment after buying a house. In the Netherlands, there are more than eight million passenger cars. Despite this high number of vehicles in the Netherlands, there is a trend that people do not always own the car. Driven by the financial crisis, financial leasing, buying a car on a monthly base, became increasingly popular. Moreover, it becomes more common to share a car with others or to make use of cars offered at a sharing platform. Car sharing is regarded as the most successful example of the access economy.

There are various forms of car sharing. The first type of car sharing is beyond the scope of this study, namely business-to-consumer sharing. Although this study focuses on consumer-to-consumer sharing, it is interesting to notice that businesses in the automotive sector are already participating in business-to-consumer sharing. These experiences might guide their participation in consumer-to-consumer sharing. A good example in this category is Greenwheels, which originally started as a start-up, but is currently part of Pon. Another example is Maven, which is founded by General Motors. In this type of sharing, people easily have access to cars owned by a company.



Second, people can use each other's cars. In the Netherlands, SnappCar is the largest platform on which people can share cars with each other. SnappCar has been founded in the Netherlands in 2011 and is currently also active in Denmark, Germany and Sweden. In the four countries, the community counts 150.000 members and is still growing. Both SnappCar and Greenwheels are founded from the idea that there is a high idling capacity in the automotive sector. Besides that, most important was the presence of a profitable business case.

SnappCar is a start-up, but in Germany, Opel has set up a similar network, CarUnity. Although the platform is an initiative of Opel, all cars can be shared. CarUnity is a first example how incumbents can participate in the access economy as defined in this study (see option 1 in Figure 7). Since the start in 2015, almost 10.000 members have signed up in Berlin and Frankfurt. In addition to setting up a sharing platform, business can also deliver cars to a sharing platform (option 2 in Figure 7) or promote usage of a sharing platform among its customers (option 3 in Figure 7). A good example of this is a promo of the website www.privatelease.com together with SnappCar. People can lease a Fiat 500 for a reduced amount per month when they share their car at least two times per month via SnappCar. The income of the two days sharing is for SnappCar and www.privatelease.com.

The last way to participate in the access economy is becoming a service provider. Businesses do not set up a sharing platform, but deliver services to make the sharing platforms more convenient (option 4 in Figure 7). Shuttel, a new service of Pon is a good example of this type of participation. Shuttel offers a card that allows users to make use of different forms of mobility. They can use shared

cars with the app, but also public transport or shared bikes. Shuttel has an umbrella function: all types of mobility are included, regardless which brand, product or owner. The shared cars or bikes can be owned by businesses or by individuals. Currently, the app is mostly used by employees of businesses with a large fleet. Since all types of mobility are included in one app, the convenience is increased. Incumbents in the automotive sector do also offer insurances and could expand their insurances to create a match with the access economy.

To study the strategic considerations of incumbents, three incumbents are studied. Two participating incumbents, Auto Hoogenboom and Pon are studied. The two incumbents represent the same brands, but operate at a different level in the value chain. General Motors and more specifically Opel, is studied as a non-participating business. General Motors already participates in the access economy in the United States and Germany. Although there are plans to expand the car sharing services over the world, there are no concrete plans for the Netherlands yet.

<p>AUTO HOOGENBOOM</p> <p>Dealer of Volkswagen, Audi, Porsche, SEAT and ŠKODA</p> <p>One of the largest dealer holdings of Pon brands</p> <p>Sales (new and occasions), leasing, maintenance and Shuttel</p>	<p></p> <p>Trade and import of cars</p> <p>15.000 employees</p> <p>Volkswagen, Audi, SEAT, ŠKODA, Porsche, Bentley, Bugatti, Lamborghini</p> <p>Leasing, maintenance, car sharing, finance, insurance, broad mobility solutions such as Greenwheels and Shuttel</p>	<p></p> <p>Car manufacturer</p> <p>225.000 employees</p> <p>Chevrolet, Buick, GMC, Cadillac, Opel, Vauxhall, Holden, Baojun, Wuling, and Jiefang</p> <p>Car manufacturing, car sharing, broad mobility solutions</p>
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4.2.1 Interpretation access economy

Within the automotive sector, the studied incumbents are highly aware of a changing environment. All businesses experience a high demand from customers for new mobility solutions such as car sharing; dealers often get questions whether they deliver services in which it is possible to make use of car sharing. So, according to the incumbents, the critical mass is present. However, it should be noted that there is a difference between urban and rural areas. All businesses operate in both areas and they indicate that the demand in urban areas is much higher than in rural areas. Moreover, the critical mass is mostly present among the young generation. The younger generation is the generation in which ownership is less important. The respondents experience that owning a car is no longer

regarded to be a status symbol. A first step away from ownership is leasing, which became increasingly popular over the last years. A next step might be sharing.

Within the interviews, it became clear that the incumbents do not see any serious problem regarding the capacity of society to manage resources itself or a lack of trust between strangers. Furthermore, the incumbents perceive possible problems as a challenge for them to find a solution.

4.2.2 Strategic considerations

Managerial cognition

As described in the previous subsection, the incumbents are aware of a changing environment and are also aware of the idea that they should adjust to this changing environment. The incumbents see car sharing as a part of a broader set of changes. Mobility, especially within the urban area, will change. Not only the ownership of cars changes, there is also a higher demand for other types of mobility. For example, Pon is already running tests to use drones as a mode of transport. Therefore, the incumbents frame the changes as mobility sharing and not as car sharing. Pon calls these ideas *next urban mobility*. The service Shuttel is a good example of mobility sharing. General Motors also acknowledges a wider set of changes and points also towards developments regarding electric vehicles and Wi-Fi in cars.

Although the incumbents are aware of a changing environment and the attention is very high, the cultures within the organisations might impede participation in the access economy. Firstly, there is a high degree of *verzuijing*. All big players in the automotive sector represent various brands. However, all these brands are separate organisations within the bigger organisation. It is very difficult to combine the brands and to stimulate knowledge exchange. This problem arises in multiple phases of the chain. Looking for example at Auto Hoogenboom and Pon: at the top, there is the Porsch family. For them it is irrelevant which brand is most successful, as long as they are making profit. However, the factories are separated and each factory wants to increase the sale of their own brand. Subsequently the cars are distributed by Pon. Again, for Pon it is irrelevant whether a Volkswagen or Audi is sold. The dealer holdings, such as Auto Hoogenboom do also not prefer one brand over the other. However, the dealers are settled on the number of cars they sell. Therefore, they are focused on selling their own brand. These contradictions make it difficult to successfully discuss ideas about the access economy since these initiatives should be brand transcending.

Another problem is that there is a high inertia among dealers, especially in the rural areas. Dealers are very traditional and therefore, innovative groups within the organisation are on an island, moving faster than the rest of the organisation. There is a contradiction between innovation and traditional thinking within the organisation. Opel also indicates that the dealers are not involved in innovations. Opel Netherlands delivers information about trends to General Motors, but General

Motors determines the policy for the Netherlands. It should be noted that, because the policy is determined by General Motors, the future for Opel is unclear since Opel is recently taken over by PSA. The last problem related to the incumbents' identity is the meeting culture within the large organisations. For every topic and for every brand there are multiple commissions. All these commissions impede the exchange of knowledge between different parts of the organisation.

All studied incumbents are actively searching for possibilities to participate in the access economy. To do this, Pon has for example set up start-ups within the business and has created think tanks. These start-ups and think tanks are for example considering ideas about car sharing, mobility sharing, new types of mobility and implications of policies (for example parking spots and low emission zones). The incumbents have positive experiences with earlier adaptations to a changing environment: General Motors has positive experiences with participating in the access economy in the United States and Germany; Pon experienced success with business-to-consumer sharing platform Greenwheels and Auto Hoogenboom experienced an increase in the amount of leasing contracts. All businesses have experienced that it is not a problem to move away from a traditional business model. This lesson has a positive impact on the search process regarding the access economy.

Capabilities

A problem within the automotive sector is that the dealers are very traditional. For the access economy, an innovative mindset is necessary. This innovation is present within the bigger organisations, but not yet among the dealers. To solve this problem, Pon has a Pon Academy to update the knowledge of dealers. Moreover, another type of new employees is hired. Knowledge of the automotive sector is no longer most important; the employees have to be flexible and innovative. The changing environment is also reflected in a changing purchasing process. People do still buy their car in a showroom, but most of the work is done online. This also changes the capabilities dealers and salesmen need. Also for car sharing, the capability to operate in an online environment is very important. Although the studied businesses, and especially Auto Hoogenboom, are actively engaged in improving these capabilities, this is very difficult because of the traditional character of the dealers. Auto Hoogenboom is regarded to be best practice in e-commerce. However, compared to e-commerce businesses,

Auto Hoogenboom provided a nice example of the different type of skills currently needed in the automotive sector. Since the purchasing process is mostly done in an online environment and people have more untraditional questions about mobility, the traditional way of selling is no longer sufficient. Auto Hoogenboom has hired a salesman with no experience in the automotive sector. His experience with sales only consisted of an internship at the customer contact centre of an insurance company. He is trained in discovering the wishes of customers and currently he only sells eighteen cars less than Auto Hoogenboom's best salesman, without any knowledge about the automotive sector.

they deliver a substandard performance. Pon and General Motors are also actively engaged in improving the capability to operate in an online environment. They are not focussing on e-commerce, but on the development of apps within cars, which is also important to make a success of car sharing. The two businesses have already had some success with these apps and therefore possess the capability to participate in the access economy.

Another necessary capability is the suitability of cars for the access economy. Physically, the cars are perfectly suitable for the access economy, since they do not deteriorate by normal usage. However, the reputation of the brand also determines whether a car is suitable for the access economy. Among the Pon brands for example, leasing is much more popular among SEAT users than among other users. It is likely that these drivers are also more inclined to share their car. However, since almost all incumbents in the sector represent various brands for different target groups, this is not a problem for participation in the access economy.

The capability to generate trust is the last necessary capability, which is also possessed by the incumbents. Firstly, they represent strong brands. Moreover, the businesses can provide maintenance contracts. These two features generate trust since consumers have higher certitude about the quality of other people's cars. The suppliers within the access economy know that their car is always maintained properly. Since some of the incumbents also offer insurances, they can also adjust these insurances to the access economy. This also improves the trust between strangers to make use of each other's cars.

Business model

The traditional business model of the automotive sector is based on sales. Both dealers and salesmen have to sell a certain number of cars per year. Moreover, they get provision for selling extras on the cars. This business model is the opposite of the business model fitting the access economy. Though, the automotive sector has renewed over the last years and private lease has become more common. Private lease asks for a different way of financing for the dealers, but when the new cash flows are arranged, this is not necessarily a problem for the incumbents. This shift indicates that it is possible for the sector to adjust their business model to a changing environment. In addition to sales, dealers offer maintenance services. These maintenance services fit perfectly within the access economy and can even be expanded.

The incumbents indicate that they have to adjust their business model because of a societal demand. Moreover, they have to anticipate on possible actions of the competition. Over the last years, traditional sales of cars declined. Therefore, one incumbent indicated that the adjustments are necessary: "it is better to sell cars for the access economy than not selling cars at all". The incumbents

do not fear cannibalism of the market, since a lot of people who share would otherwise not have bought a car. Moreover, they can set up a different business model with new services.

The advantages of new business models fitting the access economy are mostly that it raises extra money. The incumbents indicate that sustainability is important, but this is not the main driver. The access economy is also not used to improve the reputation of the incumbents. The services enter the market with a new name and are often start-ups within the incumbents. Therefore, the link between the service and the incumbent is not directly clear for the consumers.

4.2.3 Role service providers

Within car sharing, service providers play an important role. The studied incumbents are mostly interested in offering services. Examples of services are maintenance and repair, but also apps or cards to have easy access to shared vehicles. Insurance companies are also interested in car sharing. They indicate that there is a clear demand from consumers for special insurances for the access economy. Although the incumbents did not report that trust between strangers is a problem, the insurance companies get questions from their customers what happens when someone else gets involved in an accident. Therefore, the insurance companies have created new modules that complement the traditional car insurance. It is for example possible to have an all risk insurance when someone else drives your car. Insurance companies differ from one another in who needs to have an extra insurance: the supply- or demand-side of the access economy. In addition to the extra modules, insurance company Allianz has a partnership with SnappCar and Centraal Beheer with MyWheels to facilitate the insurance of shared cars.

4.2.4 Role Dutch government

The incumbent businesses indicate that car sharing should be initiated by the industry. However, the Dutch government, both at national and local level, plays an important role according to the

The Netherlands is one of the leading countries regarding electric vehicles. The incumbents indicate that this is the reason that a lot of pilots and pilot models of electrical cars are introduced in the Netherlands. However, last year, the government became the opinion that electric cars are such a success, that the stimulation in the form of tax reduction is no longer necessary. Within a week, it was decided to change the system. This led to a decrease of the sale of new cars of about fifteen percent. It is important that the government tries to prevent this to happen for the access economy.

incumbents. This is also acknowledged by the government that has entered a green deal *Autodelen (car sharing)* with the industry. Surprisingly, the studied incumbents are not included in the deal between the national government, some local governments, insurance companies, leasing companies and sharing platforms. The aim of the deal is to stimulate car sharing and to exchange knowledge with each

other. Transparency and information about future policy is very important for the incumbents, since this decreases the risk of their investment.

The success of car sharing is partly determined by the policy of (local) governments. The convenience of car sharing is for example increased by having enough parking spots. Another policy that might influence the access economy is low emission zones. Pon has think tanks to deal with this kind of issues. Moreover, the incumbents have people working that are able to lobby within the government and try to influence the policy-making process.

Although the access economy should be initiated by the market, the incumbents believe that the government can stimulate sustainability and the access economy by organizing conferences and events around the theme. This is already successfully done by some municipalities, but can be expanded.

4.2.5 Sub-conclusion Case II: Automotive sector

The incumbents within the automotive sector are highly aware of a changing environment. They are actively searching for ways to match their capabilities and business models to the access economy. Problematic in this process is that the dealers are very traditional. Dealers have to meet a target and are therefore afraid for changes that might reduce the sales of new cars. Moreover, the traditional dealers have to obtain new capabilities and new sales techniques. The incumbents already possess the capability to operate in an online environment. Moreover, they have the capability to generate trust or deliver insurances.

To participate in the access economy, the traditional business model of sales has to change. Though, the incumbents already deliver services, such as maintenance, that fit in the access economy and can even be enhanced by participating in it. Moreover, the success of private lease shows that it is not necessarily a problem to change the income flows of the organisation. To change the business model, the incumbents are mostly interested in becoming a service provider.

4.3 Case III: Home improvement and garden sector

The previous two cases focused on goods with a relatively long durability. Tools, the main products of the home improvement and garden sector that are interesting for this study, have a shorter lifespan, but are also mostly bought for several years and are designed for multiple usage. A related important difference between yachts and cars on the one hand and tools on the other hand is that tools are much cheaper. The process of purchase is therefore shorter. As was the case for yachts and cars, this sector has also faced a decrease in sales because of the financial crisis. Currently, because of the attractive housing market, the sales start to improve again.

Even though tools are less expensive, they are often shared between consumers and there are several platforms. The largest platform in the Netherlands is Peerby. Peerby is a start-up founded in 2012 and currently has active communities in twenty cities across Europe and in ten pilot cities in the United States. The motivation behind Peerby is to promote a more sustainable lifestyle and to create more social cohesion in neighbourhoods. On the website and the app, one can borrow more than 4000 goods for free within 30 minutes from their neighbours. The main task of Peerby is to connect demand and supply. Besides this, Peerby does not provide other services. Peerby is a non-profit organisation. In 2015, the founders of Peerby launched Peerby GO. The main difference between Peerby and Peerby GO is that the first one is for free, while on Peerby GO people pay rent to other consumers and a provision to the platform. In return, Peerby GO offers extra services, such as an insurance and a delivery service.

In the United Kingdom (UK), B&Q, UK's leading home improvement and garden living retailer, is actively involved in Streetbank. Like Peerby, Streetbank is a consumer-to-consumer sharing platform of consumption goods with an idling capacity, such as tools. Streetbank is a worldwide network, operating in 81 countries, counting almost 50.000 members, who share 104.245 goods with each other. In 2013, The Times has rated Streetbank as one of the "50 websites one can't live without". The platform is for free and has no profit incentives. Its income is derived from donations.

B&Q serves as an example to select incumbents that are not participating in the access economy. The retailer B&Q performs the role of a sharing platform (number 1 in Figure 1). The Dutch incumbents that were comparable to B&Q could not participate in the research. This was due to multiple factors. Firstly, some do not have a Dutch division that is able to provide information about their strategies regarding the access economy. Others are unfamiliar with the access economy and do therefore not want to participate in this study. From this, it can be concluded that the attention in this sector is very low in the Netherlands. Two smaller incumbents were willing to cooperate in this study, Eco-logisch and Warentuin. Eco-logisch is a home improvement store with sustainable products. Eco-

logisch offers both online and in-store shopping. The owner of this business, the respondent of this study, has been involved in the founding of Peerby. Warentuin is an online garden centre with in store service points. Interesting about this store is that it was the first online retailer in the garden sector. The online store has been founded by traditional businesses. In addition, the founder of Warentuin, the respondent of this study, is still involved in a traditional garden centre. Moreover, the branch organisation of garden centres is interviewed about the strategical considerations of its members. The respondent of the branch organisation has also contacted some of its members to ask about their opinion. This information is also included in the analysis. In addition to the creation of a sharing platform, the incumbents can actively promote to share goods among their customers (option 2 in Figure 7), or they can provide goods to a sharing platform (option 3 in Figure 7).



4.3.1 Interpretation access economy

Within the sector, the studied incumbents are aware of a changing environment and therefore, incumbents increasingly enter the online market. However, the studied incumbents doubt whether there is a critical mass for the access economy. They expect that people want to have their own tools. Moreover, they believe that business-to-consumer initiatives, in which goods are owned by a business, are often more convenient and cheaper for consumers to have access to tools. An additional problem is that tools shared by consumers are often of low quality, since people do not share their new and expensive goods. The experiences of the incumbents show that sharing is mostly done because of practical or financial benefits. A critical mass is missing in the access economy since these benefits are not always present within this sector.

An often-heard argument for sharing tools is that there is an idling capacity. However, for the garden sector this is not always the case. There is an idling capacity most of the time, but everybody

wants to use the goods at the same time. Therefore, the same problem arises as in the yachts sector. The incumbents acknowledge that there is an idling capacity for regular tools.

In addition to the absence of a critical mass, the incumbents do not possess a belief in the commons. Trust among people, strangers or neighbours, is too low. Moreover, people are often inclined to take advantage of each other. Especially Eco-logisch experiences these types of problems. Eco-logisch delivers goods to a project in which neighbours have to replace the roofs. The residents can save money by replacing the roofs together. Therefore, the neighbourhood tried to establish a cooperation between the residents. However, this led to all kinds of trust-related problems. Similar problems are likely to arise in the access economy. The issue of trust is also confirmed by the other incumbents. Experiences with business-to-consumer sharing showed that goods are rarely returned in the same state as they are rented. Moreover, there are often issues around the question who cleans the tools after usage and who is responsible for the maintenance of the tools.

“When neighbours already have so much trouble to share some responsibilities, one can easily imagine the problems between strangers.” – Eco-logisch

4.3.2 Strategic considerations

Managerial cognition

As described in the previous section, the incumbents do not experience a changing environment because of the access economy since a critical mass is absent. The sector experiences problems and a decrease in sales, but these problems are not linked to the access economy. The cognitive frame of the incumbents is thus that specific activities are unnecessary.

Especially for the garden centres, the history of the incumbents is important to understand their passive attitude towards the access economy. Garden centres are originated from growers and are mostly franchise organisations. The culture within these organisations is very introvert. It is difficult for them to actively search for new business models. They always expected that customers will find the centres by themselves. However, the past years have shown that this is not always the case. The incumbents need to actively attract new customers, although this is very difficult for them. The respondents also indicated that garden centres are very traditional and do not like “to have any hustle”. The main aim of the centres is to maximise profits and all actions are focussed on this aim. Relatedly, the branch organisation indicated that it is difficult to convince the garden centres of the necessity of sustainability and new initiatives. Therefore, the branch organisation tries to implement sustainability over the heads of the centres. Though, this is difficult for the access economy, since this is something they need to do by themselves. The founder of Eco-logisch on the other hand indicated that there is a very open atmosphere within the business in which new ideas can be discussed.

However, from the start, Eco-logisch had a strong focus on sustainability, which indicates that they have a more open-minded identity than other incumbents in the sector.

Because of the described identity and the negative attitude towards the access economy, the attention among incumbents is almost completely absent. Eco-logisch and Warentuin are relatively new businesses and have therefore more attention for new developments. However, among them the attention for the access economy is also relatively low, although they have thought about it in the past. Eco-logisch and Warentuin carry or carried out active search activities, but they both have negative experiences with the access economy or other innovations. Eco-logisch has negative experiences with a business-to-consumer rental service they offer. Goods are rarely returned undamaged and there is often discussion about the state of the rented tools. Warentuin is very innovative with the online shop. However, the business encounters problems that will probably also arise in the access economy. These problems are related to the shipping costs of the goods. For example, the shipping costs of a shovel are higher than the price of the product. The branch organisation indicated that most retailers do not perform any search activities. Moreover, when search activities are performed, this is mostly done by the umbrella organisations, such as Intratuin and GroenRijk, and not by the franchise organisations.

Capabilities

In the previous paragraph is already indicated that the sector has suffered by the financial crisis of 2009. Because of this, the incumbent businesses face serious budget constraints. These budget constraints impede innovations and participation in the access economy becomes difficult. The branch organisation of the garden sector provided an example of a sustainable initiative, *De Levende Tuin (The Living Garden)*. Umbrella organisation Intratuin has adopted this concept. However, for the individual businesses adopting the initiative costs 35.000 euro. The incumbents are unable to make this investment. In addition, the investment is higher than the return. Therefore, the incumbents are currently unable to make these types of sustainable investments and this also applies to participation in the access economy. All respondents noted that participation in the access economy causes extra costs and extra man power. For example, the respondents assumed that the sharing platform should be responsible for the maintenance of the products (although this is not the case for Peerby). These activities bring in extra costs, which is currently unfeasible for most incumbents. In short, the financial capacity is missing for the incumbents to participate in the access economy.

Secondly, an important capability is that the products are suited for sharing. The respondents indicated that their products are unsuitable for the access economy. As already indicated, the shipping costs are relatively high. The products in this branch have relatively low value and high volume. This impedes the access economy, since it becomes difficult to make use of each other's goods. The studied

incumbents do have the capacity to operate in an online environment, but the products are not suitable for it. Peerby and Streetbank solved the problem of high transport costs by promoting sharing within neighbourhoods. Another problem regarding the suitability of the goods is that tools become cheaper due to cheap production in China and the purchase is not a barrier for people to work in and around their homes. In addition, tools wear out by every usage. Lastly, as already indicated, the products of garden centres do not have the necessary idling capacity, since everybody wants to use them at the same moment. The capability to generate trust is also important. Although the incumbents consider the maintenance of the tools as a barrier, it also increases the trust of consumers. When the maintenance is performed by professionals, consumers have more trust in the quality of the products they borrow. Moreover, it provides security for the suppliers in the access economy. To participate in the access economy, incumbents need to be innovative, flexible and creative. The incumbents indicate that these characteristics do in general not apply to the traditional incumbents in the sector.

Business model

The business model of home improvement and garden retailers is very traditional. They purchase goods and sell it to their customers. Some businesses (but just a very few in the sector of garden centres) expand this business model with business-to-consumer sharing. For the traditional purchase-sell business model, the access economy implies a complete new business model. The respondents indicate that incumbents will only participate in the access economy when this increases their sales. So, a new business model will only be adopted when this enhances the traditional business model. When incumbents already offer a rental service, the adjustments are less severe. However, as already indicated, only a few incumbents have a rental service and the experiences with this service are mixed.

4.3.3 Role service providers

The previous sections showed that the incumbents experience several problems regarding the access economy. Two important problems are trust between strangers and the transportation costs. These two problems are encountered by Peerby GO, which offers an insurance and a delivery service. Both services are performed by the platform itself. In the beginning, Peerby had a partnership with Centraal Beheer. However, for insurance companies it is difficult to design a proper product for sharing platforms. Therefore, the partnership has evolved to a marketing agreement. Insurance companies offer adjusted traditional insurances in which the access economy is better embedded and Peerby GO has its own insurance system.

Peerby GO shows that a sharing platform can offer more than just bringing people together. Although the incumbents see this services as an improvement, they do not believe it is enough to

create the necessary critical mass. Moreover, the budget constraints become more severe by offering extra services.

4.3.4 Role Dutch government

The branch organisation of garden centres performs a lot of lobbying activities at the government to represent the interests of its members. The organisation has also worked together with the government in several green deals. Despite of positive experiences with the cooperation with the government, the branch organisation believes that the access economy should originate from the market and that there is no role for the government. This feeling is shared by the other respondents.

4.3.5 Sub-conclusion Case III: Home improvement and garden sector

Dutch home improvement and garden retailers do experience a changing environment. Moreover, there is an increasing shift towards the online market. However, the incumbents indicate that the products are not always suitable to sell online because of the low value and high volume. These problems are also important within the access economy. Therefore, the incumbents do not believe in a shift from ownership to access in this sector. The convenience of sharing services is probably too low. Moreover, the incumbents do not believe in the necessary trust between strangers.

Because of the negative attitude towards the access economy, the attention is very low. The businesses in the sector are very traditional, which impedes participation in the access economy. Incumbents have a traditional business model in which sales are leading. They only want to start new business activities when this enhances their traditional business model. Another problem is the solvability of the incumbents; they do often not have the buffer to set a new business division.

4.4 Case IV: Fashion sector

Of the studied cases, the fashion sector comprises the products with the shortest lifetime, since garments are often bought for only one season. As for all sectors, consumers' expenditures declined in the financial crisis. Because of this decline, fast fashion became more important. Fast fashion implies new and affordable collections at the stores multiple times per year or even per season. To adapt to this new business model, the fashion industry needs to produce faster and cheaper, which increases the environmental load of the fashion industry.

As a counter reaction to fast fashion, LENA, the first Dutch fashion library has been founded. LENA is an online and offline library where people can share their clothes. Instead of buying clothes, the consumers pay a monthly fee and for this amount they can endlessly swap their wardrobe. The clothes offered in the library are firstly derived from the consumers themselves. By offering clothes, one receives credits to borrow other's clothes. In addition, young designers provide clothes and lastly clothes are provided by incumbent fashion brands. To stimulate the usage of the platform, LENA acknowledges the importance of a varied collection. Therefore, the platform is setting up partnerships with fashion brands. The collection is on loan from the fashion brands; at the end of the term, the brands get back their clothes.

In addition to a personal interview with one of the founders of LENA, this case study is based on personal interviews with three brands that participate or might participate in the access economy by offering clothes on a sharing platform. Alexandra Frida and Pulp are two participating incumbents. Joline Jolink is a fashion brand that does care for sustainability. However, Joline Jolink is not interested in participating in the access economy. All incumbents value sustainability, but Pulp is the only incumbent that has been founded with the aim to set up a sustainable brand, though it was not the aim to start a brand that is suitable for the access economy. Lastly, to complement the information gathered by the interviews with incumbents, a personal interview with consultancy firm GW Agency is performed. GW stands for Gone Wrong and the agency is specialised in sustainability within the fashion sector. Moreover, the agency has performed a study into the willingness of fashion brands to cooperate with LENA. This study was commissioned by LENA and differs from this study since it was more oriented towards possible business models, while the study of this paper focuses on strategical considerations.

Besides loaning clothes to LENA (option 3 in Figure 7), it is also possible that fashion brands actively stimulate sharing among their customers (option 2). In the United States for example, Patagonia, a brand of outdoor clothing, promotes the usage of Yerdle, an American sharing platform.

Another possibility is that fashion brands set up a sharing platform by themselves (option 1). Currently, there is no example of a fashion brand that has set up a sharing platform.

ALEXANDRA FRIDA

Founded in 2014

Haute couture and ready-to-wear collection

In-store shopping

Offers clothes on LENA



Founded in 2015

Haute couture and ready-to-wear collection

In-store shopping

Aims to re-use textile waste

Offers clothes on LENA

JOLINE JOLINK

Founded in 2006

Ready-to-wear collection

Online and in-store shopping

Timeless designs – no sales

Aims to reduce the number of intermediaries in the system



Experience of nine years working in fashion sector

Experience with consultancy work for incumbents in the fashion sector

Study for LENA about willingness of fashion brands to participate

4.4.1 Interpretation access economy

The first condition of the access economy is the presence of a critical mass. Although there is already a wide group of consumers of the fashion library, LENA argues that the mindset among consumers has to change in order to accelerate the initiative. The incumbents do not believe in the presence of a critical mass. People are unfamiliar with the idea of a fashion library and shared fashion. Moreover, when they are aware of it, they are often not interested. The incumbents argue that fashion is something personal and people perceive it is unclean to wear other people's clothes. Moreover, clothes deteriorate by wearing and washing, and people want something new. Although LENA is successful, the number of members is still a minimal percentage of the total population.

The second condition of the access economy is the presence of an idling capacity. From the four studied sectors, the idling capacity is most present in the fashion sector. Only twenty percent of the clothes is used on a regular basis. In addition, a large number of still usable garments is thrown away by consumers, producers and retailers since there is little valuation for clothes. The low valuation is caused by a persistent wish for renewal, which is also the driver of the trend of fast fashion.

Like the previous cases, trust between strangers and the absence of a belief in the commons is a problem for sharing within the fashion sector. The non-participating incumbent believes that consumers are less careful with other people's clothes. Hygiene is also raised as an issue impeding the access economy.

4.4.2 Strategic considerations

Managerial cognition

To study the fashion sector, about twenty incumbents are asked to participate in this study. Almost all incumbents responded negatively because they were unfamiliar with the access economy. The unfamiliarity within the sector is also confirmed by GW Agency. Both participating and non-participating incumbents state that the critical mass is currently missing. This unfamiliarity determines the cognitive frame of the incumbents. GW Agency experienced that incumbents do not know how to act within the access economy. In the interview with Joline Jolink it became clear that the business is interested in initiatives as fashion libraries, but since they do not believe in a critical mass, they do not perceive a drive to act. The participating incumbent businesses also experience problems regarding the access economy, but believe they are surmountable and actions should be taken.

All studied incumbents operate in an open environment in which new ideas can be discussed. Moreover, the businesses, especially Alexandra Frida and Pulp, are actively looking for new ideas. However, this attention does not specifically focus on the access economy. For the studied fashion brands, it is important what they project to their customers. These questions concern the type of customers they want to attract, the durability of their products, whether sustainability is important, etcetera. This chosen identity determines whether the access economy fits in the picture. The access

"You do not want your clothes to be sold in every store. So, you also do not want your clothes to be borrowed in every library. Every brand is actively engaged in potential customers' experiences".
- Alexandra Frida

economy is often associated with second hand clothes. However, brands do often not want to identify themselves with second hand clothes. Alexandra Frida therefore indicates that it is very positive that LENA also has a high-end section within the library. This way, more brands get attracted to the initiative.

Among all incumbents, both participating and non-participating, the search activities are minimal. This is partly due to a lack of attention for the access economy. Most incumbents do not see any reason to change the current activities. Another reason is the fact that the traditional business model of sales does not easily fit into the access economy. LENA should make the search process easier by offering a clear-cut programme to incumbents. The participating incumbents are not looking for ways to intensify their participation in the access economy because of negative experiences. The incumbents have to put a lot of time into finding the best way to participate in the access economy or to set up a partnership with LENA. However, the returns are too low to compensate for the investment.

Participation in the access economy is often to a large extent driven by altruism. Because of the good intentions of the founders of LENA, the incumbents are willing to participate. They are also approached by other sharing platforms. However, these platforms are often aimed at high profits. Since the fashion incumbents do not make profit by participating in the access economy, they are unwilling to work together with platforms that only want to earn money.

Capabilities

As already mentioned, clothes deteriorate by wearing and washing. Therefore, a good quality of the products is essential for participation in the access economy. However, a high quality is accompanied by high production costs. So, participation in the access economy becomes difficult. Moreover, many incumbents are focused on fast fashion, in which products are not designed to be long lasting. These products are not suitable for the access economy. Most fashion garments are not designed for intensive usage. This is different for other clothes, such as outdoor garments (for example Patagonia), since these brands design on the functionality and durability and are therefore more suitable for the access economy. Although a problem of the incumbents is that the quality of the products is too low, the incumbents do have the capability to generate trust among consumers. Therefore, LENA can improve the reputation of the platform by having partnerships with well-known brands.

The last capability is the capability to operate in an online environment. Within the fashion sector, over the last years, businesses faced competition from online shopping. Consumers' behaviour has changed and online shopping became a norm. Currently, most of the incumbents have followed this trend and are currently able to operate in an online environment. So, the incumbents possess this capability. Moreover, this capability is also performed by LENA, so it is unnecessary to be able to operate in an online environment.

Business model

For incumbents within the fashion sector, sales are most important. The business models are focused on increasing sales. The access economy asks for another approach and the business model should change. The participating incumbents argue that the access economy can also be a mean to improve a traditional business model of sales. To increase the sales, it is important to have a proper idea of the target group. By offering clothes on LENA, businesses get to know their target group. Moreover, for young incumbents, the access economy is a way to create brand awareness.

On the other hands, incumbents indicate that they are missing income by participating in the access economy. LENA and/or the incumbents should design a different business model in which the incumbents receive more money when their products are borrowed. However, even when profits are generated by participating in the access economy, new flows of income are generated, which is difficult for the incumbents. Therefore, LENA should offer a new business model that can be easily implemented by the incumbents.

Currently, many incumbents within the fashion sector claim to be sustainable. However, the most important problem within the fashion sector is overproduction and -consumption. There are almost no incumbents that want to address this problem; the incumbents willing to decrease their amount of sales are hard to find. When the access economy is adopted in the business models, it is often only to increase the sales and not from a sustainable point of view.

Alexandra Frida proposes that it might be interesting to set up a label that is solely focused on the access economy. To achieve this, one must adopt a new business model. Moreover, the quality should be very high, so it becomes suitable for the access economy. Until now, there has not been a brand that has ever tried this.

4.4.3 Role service providers

Since consumers have a low valuation of clothes and clothes are relatively cheap, insurances are not very relevant for this sector. The insurance companies also note that they have never had an information request for this sector. LENA has set up a system in which the consumer and the platform bear the risk together. When garment is irreparably damaged, both parties pay half of the replacement value. Consumers pay a small amount for reparable damage. When the garments cannot be shared anymore, the incumbents receive the clothes back. Therefore, the incumbents bare the risk of regular damage because of usage. Experience learns that the returned clothes cannot be used anymore.

As already described, hygiene is a problem in this sector. Consumers are obliged to return cleaned garments. However, when people do not want to do this and to wash delicate fabrics, LENA started a laundry service together with AEG and Seepje, a fair-trade detergent. This way, the hygiene is insured by the sharing platform.

4.4.4 Role Dutch government

Similar to the earlier discussed cases, the incumbents in this sector believe that the access economy should be initiated by the market. They argue that it is most important that the customers want it. When there is a demand, the businesses will automatically follow. This is also true for sustainability in general, the wish of customers is most important. The ideas about the question whether the government should stimulate sustainability within the sector are mixed. On the one hand, incumbents argue that the government should set a norm. Rules about the transparency of fashion brands should be established and the government should set some minimum requirements. On the other hand, the incumbents are afraid that these kinds of requirements will only apply to the smaller businesses, since the large businesses have the power and possibilities to exert noncompliance.

4.4.5 Sub-conclusion Case IV: Fashion sector

The incumbents in the fashion sector are very unfamiliar with the access economy. They do not believe in a critical mass willing to share clothes with each other since fashion is something personal. Therefore, there is little attention for the access economy and the incumbents do not perform any search activities. The participating incumbents also perform little search activities to further increase their participation because of the negative experiences: it costs more than it yields.

Besides the negative interpretation of the access economy there is another problem; the products are often unsuitable for the access economy since the quality is too low. Fashion and especially fast fashion is often not designed for the intensive usage that is necessary for the access economy. Lastly, the focus of the fashion sector is sales. Therefore, the incumbents must adopt a completely new business model, with new income flows, to participate in the access economy. Though, it is argued by the incumbents that the access economy can also serve as a tool to increase sales.

4.5 Overview case descriptions

The results of the case descriptions of the previous subsections are displayed in Table 7. Although the table only provides a schematic overview, it provides an insight into the similarities and differences between the cases. The cases will be compared in more detail in the cross-case analysis of Chapter 6.

Table 7: Overview of case descriptions.

	Yachts sector	Automotive sector	Home improvement and garden sector	Fashion sector
Access economy (=changing environment)				
Critical mass	+/-	+	-	-
Idling capacity	+/-	+	+/-	+
Belief in commons	-	+	-	-
Trust between strangers	-	+	-	-
Interpretation of the access economy – managerial cognition				
Cognitive frame	Changing environment, but problems regarding access economy	Changing environment, framed as mobility sharing	No critical mass, so extra activities are unnecessary	No critical mass, so extra activities are unnecessary; high unfamiliarity
Identity/dominant logic	Small family businesses; open environment	Traditional dealers; umbrella organisations more innovative	Traditional businesses; introvert	Open environment; no wish for association with loaning clothes
Attention	+	+	-	-
Search process	Mixed experiences, no concrete search process	Positive experiences, active search process	Negative experiences, no search process	Negative experiences, no search process
Capabilities				
Match capabilities and access economy	+/-	+/-	-	+/-
Match business model and access economy	+/-	+/-	-	-
Adaption of capabilities	Unwilling	Already working on adaption	Unwilling	Unwilling
Adaption of business models	Not adapting, but willing; profit driven	Already adapting; profit driven	Unwilling; profit driven – increase sales	Unwilling; profit driven - increase sales

5 Role of the government - policy analysis

To answer the second part of the research question and formulate recommendations to the Dutch government, the current policy regarding the access economy is analysed. The starting point of the analysis is an overview of the current practices, indicating policy directions, actors and relevant programmes. Subsequently, it is studied what features of the governance modes are present within the Dutch policy regarding the access economy.

5.1 Overview current practices

Most of the relevant documents date from 2014 onwards. In 2014, member of parliament Liesbeth van Tongeren asked the Minister of Economic Affairs (EZ) Henk Kamp and Wilma Mansveld, Minister of Infrastructure and Environment (I&M) whether an overarching vision on the access economy is in place. Other members of parliament pointed out that there is no role for the government in these types of developments; there has always been something as an access economy, without any government interventions. The two relevant ministers promised the parliament that they will assess their role within the access economy.

As a first step of the assessment, I&M has commissioned a study into the relation between the access economy and sustainable development: *Milieu-impact en –kansen deeleconomie (Environmental Impact and Chances of the Sharing Economy)* (ShareNL, 2015a). This study showed a positive environmental effect of the access economy and therefore, I&M decided to set up transition agendas together with societal actors to stimulate the access economy. The transition agendas will be finished at the end of 2017.

EZ has a different point of view regarding the access economy. This ministry regards it as an innovative development and has therefore commissioned a study into innovation and the access economy: *Innoveren in de deeleconomie (Innovation in the Sharing Economy)* (ShareNL, 2015b). The conclusion of this study was that the access economy faces regulatory barriers. Currently, EZ is working on a research application for a study into the environmental effects of the access economy. Although I&M has already commissioned a study into the environmental effects, EZ wants a more thorough study into the environmental effects, including the rebound effects of the access economy. A rebound effect might for example be that people consume more because of their extra income gathered by sharing their goods. Until the results of this study are known, EZ will only remove impeding regulations and will not actively stimulate the access economy. When the study shows that the access economy indeed contributes to a sustainable development, the ministry will consider stimulating the access economy more actively. Although the ministries are currently involved in the access economy, there is

still a high degree of unfamiliarity and insecurity about it. Therefore, the activities are mostly explorative.

5.2 Relevant policy programmes

The access economy is a very broad concept and therefore relevant for various ministries and various government levels, from European to local. I&M and EZ are the two ministries most relevant for stimulation of the access economy. In addition, the Ministry of Finance faces new challenges regarding the taxation of the access economy. Lastly, the ministries of Social Affairs and Security and Justice have to deal with a changing labour market and new legislative challenges. The focus of this study is on I&M and EZ since they are engaged in stimulating the access economy and look after the interests of businesses. Moreover, the respondents indicate that the other ministries are barely aware of the challenges and chances of the access economy. This finding is confirmed by the absence of policy documents from other ministries.

The basic principle of the government regarding the access economy is a case-by-case approach. As mentioned before in this study, it is often difficult to precisely define the access economy. Because of this problem, every case has to be analysed to determine whether it belongs to the access economy. Moreover, every initiative asks for a different approach. An example of a programme in which one case within the access economy is dealt with is the already discussed green deal *Autodelen* (*car sharing*). The transition agendas that are currently formulated will deal with other sectors.

There is no specific policy for the access economy, but the topic is included in several other policy programmes regarding a circular economy, green growth, future proof regulations, innovation and fair competition. However, these programmes remain tenuous about the access economy. There is one policy programme in which the access economy is included in a more concrete way: *Ruimte in Regels voor Groene Groei* (*Smart Regulation for Green Growth*). This is a joint programme of the ministries of I&M and EZ. The programme offers the following description of its task:

“Our aim is to create legal flexibility in favour of growth, investment and innovation without losing sight of the public values, such as health and the environment” (Ruimte in Regels voor Groene Groei, 2017).

When businesses are impeded by regulations, this programme tries to remove the regulation or to bring parties together to come to a joint solution (for example businesses and local governments). The programme removes regulations as far as legally possible and only when public interest is not compromised.

In 2016, the European Union (EU) has published a specific agenda for the access economy containing (non-binding) guidelines for its member states. The agenda is published by the Directorate-General (DG) Grow - Internal Market, Industry, Entrepreneurship and SMEs. The tasks of this DG correspond to the tasks of EZ and therefore, the agenda is adopted by EZ. I&M, on the other hand, indicated that they are unfamiliar with the European agenda. The *European Agenda for the Collaborative Economy* aims to achieve a balanced and sustainable development of the access economy. Within the agenda, the EU acknowledges the chances of the access economy, but also acknowledges that it raises questions within existing legislation. Therefore, the agenda provides guidelines on the following issues:

- requirements for market access;
- liability of sharing platforms;
- appliance of European consumer law for users within the access economy;
- employment within the access economy;
- appliance of fiscal rules.

5.3 Features governance modes

In the following subsections, the features of governance modes as defined in Chapter 2 and 3 are discussed. Firstly, the relevant actors and their role in the policy-making process are assessed. Subsequently, the institutional factors and content of the policy programmes are described.

5.3.1 Actors and their coalitions

At the national government level, multiple ministries are involved in the policy-making process regarding the access economy. Most important in this process are EZ and I&M. Besides the national level, the European and local government level do also play an important role. The Dutch government emphasises that it depends per case which policy making level is most appropriate. Since sharing platforms are often active in more than one country, a uniform European approach on the access economy is perceived to be necessary. The main role of the central government is to take away the main barriers for and risks of the access economy. However, not all barriers can be taken away by the central government, since the local government is often responsible for regulations that stimulate or impede the access economy. Moreover, the local government is responsible for the enforcement of regulation and is an essential actor in the policy-making process of the central government. Therefore, local governments are included in the green deal *Autodelen (car sharing)* and will be included in the transition agendas. However, municipalities are not always willing to actively engage in the access economy. For example, EZ has tried to set up a city deal for the access economy, but failed because of

municipalities' unwillingness. Though, there are also local governments, such as Amsterdam, who move far ahead of the central government regarding the access economy.

Other actors beside the various levels of government include knowledge platforms, such as ShareNL, and the civil society, consisting of businesses and the public. The civil society is for example included in the green deal *Autodelen (car sharing)* to stimulate the number of shared cars in the Netherlands and will also be included in the new transition agendas. In these programmes, the access economy is stimulated by collaboration between governments and partners in the civil society. For example in the green deal, collaboration consists of structurally sharing knowledge, increasing the acquaintance with car sharing among the public and developing joint pilots.

In the programme *Smart Regulation for Green Growth*, businesses are actively engaged in the policy-making process, since they can ask for changes in the current policy. Moreover, the government wants to include the civil society in the policy-making process by using an open and digital process with public participation. The power base of the non-government actors is knowledge. They are included in the policy-making process since they are better aware of the societal problems and challenges regarding the access economy.

5.3.2 Institutional factors

The institutional factors differ considerably within the central government and between the different levels of government. At a local level, lobbying is most important to exercise influence. There are no formalised rules of interaction between businesses and the government. A business' influence depends on the people within the government it is able to affect. According to the incumbents and the sharing platforms, the decision-making process can be described as top-down.

The Ministry of I&M is currently working on transition agendas for the access economy. Within a transition agenda, public and private partners work together to set up an action plan. The model of representation is partnership. The partners determine together what is important and what should happen to stimulate the access economy and therefore, the policy-making process can be characterised as being interactive. The relationship between the actors and the obligations towards each other are fixed in the transition agenda, so there are self-crafted rules. The same institutional factors are included in the green deal *Autodelen (car sharing)*.

On the other hand, within the programme *Smart Regulation for Green Growth* the rules of interaction are more formalised. The programme is a good example of corporatism. The businesses can indicate problems they experience in society by filling in a form. Subsequently, the policy makers will consider possible policy changes. So, although the process is partly bottom-up, the decision-making process is clearly top-down. In some cases, the best solution is to bring parties together. This

is also arranged by the policy programme. In this case, the process becomes more interactive and informal.

5.3.3 Content

The central government does not have any specific goals or targets for the access economy. The main goal is not to hinder it. The absence of specific goals and targets has several reasons. Firstly, there is still too much unfamiliarity with the phenomena to set up specific targets. Secondly, the respondents indicate that the access economy is not an aim but a mean to reach a circular economy or more general a sustainable development. This is confirmed by the importance of the studies into the environmental effects of the access economy. Expert knowledge is very important within the policy making process. This is also indicated by the Ministry of EZ; they will not stimulate the access economy before they have expert knowledge about the environmental effects. For car sharing, the government has set more specific targets. However, this is initiated by the infrastructure part of the ministry and not specifically from an environmental point of view.

“Legislation should not set more limitations for new and existing activities than necessary to protect public interests” - Smart Regulation for Green Growth

Another important feature of policy is the type of instruments that is used. Since specific targets are absent, there are also no specific instruments to stimulate the access economy. Voluntary agreements are and will be settled within the green deal and transition agendas. These initiatives serve in addition to provide information to non-participating actors. The respondent of the Ministry of I&M indicated that the provision of information is a very important factor because of the high uncertainties about the access economy. To provide information, the government relies, in addition to expert knowledge, on issue and time-and-place specific knowledge that is derived from the society. This coincides with the case-by-case approach of the government.

In the previous subsection, it is already mentioned that the policy-making process is sometimes difficult since both central and local governments are involved. Also within the central government, the issue is divided over different sectors. Although *Smart Regulation for Green Growth* is a programme of both I&M and EZ, I&M has little information about the practices of EZ. There is some contact about the access economy between the two ministries, but this is limited. Moreover, it is remarkable that I&M has commissioned a study into the environmental effects in 2015 and that EZ is working again on a research proposal into the environmental effects. EZ indicates that this study will be more specific, but there will probably also be some overlap.

5.4 Sub-conclusion role of the government

The policy analysis showed that there is no general policy programme for the access economy. Governmental activities are still explorative and the government follows a case-by-case approach. For the government, the access economy is a mean to reach a sustainable development and therefore, the policy is only included in overarching government programmes. However, in these programmes the access economy is only superficially assessed.

Within the access economy, several ministries are relevant. Though, mainly EZ and I&M are currently working on the access economy. The approach of the two ministries differs and there is little coordination between them. I&M is looking ahead and is currently working on the formulation of transition agendas, agreements with non-governmental actors to promote the access economy. EZ on the other hand is less pro-active and is currently mostly working on solving regulatory barriers indicated by the market. In addition to the various relevant ministries, there are also various levels of government engaged by the access economy, which impedes implementation of new regulation. The presence of the theoretical features also differs between the ministries and levels of government. Non-governmental actors are included in the policy-making process because of their time-and-place specific knowledge, but their roles in the process and the models of representation differ.

6 Cross-case analysis

In the following section, firstly the impact of the access economy on sustainable development is described for the four sectors. Secondly, to provide an overview of the strategical considerations of incumbents to enter the access economy, a cross-case analysis is performed. Moreover, the perceived role of the government by incumbents and the actual role of the government is compared.

6.1 Sustainable development

The goods of the four sectors differ considerably from each other. Because of the differences in price, lifetime and type of good, the purchase process and type of customers vary. These factors influence the decision of consumers to shift from ownership to access and therefore the likability for sharing. Moreover, the price and lifetime of a good determine the sustainability impact (shareNL, 2015a). Especially for goods with a long lifetime, the usage intensity can be increased. By increasing the usage intensity, less products are needed, which has a positive sustainability effect. Figure 8 provides an overview of the differences between the sectors.

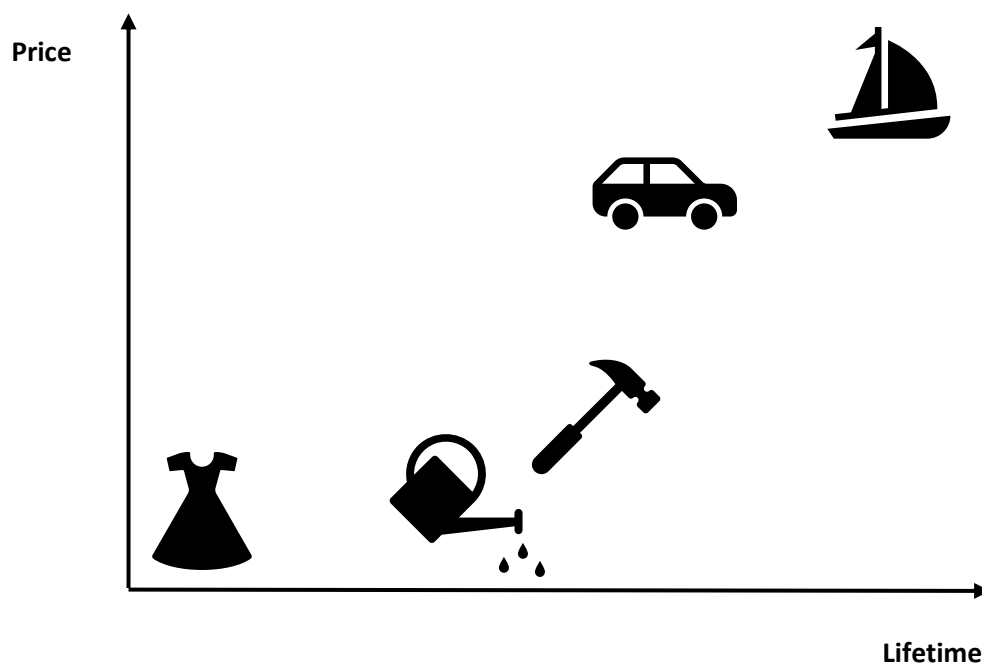


Figure 8: Price and lifetime of goods.

In a life cycle assessment, shareNL (2015a) estimated the impact on the environment of several sectors. Moreover, RIVM performed a study into the impact of car sharing in the Netherlands (personal interview I&M, 2017). The studies expect positive sustainability effects for the four sectors, but the effects are most clear for the home improvement and garden sector; less products are needed and usage is unlikely to increase because of the access economy. Leismann (2013) confirms that there is unused potential within this sector. Table 8 provides an overview of the unused potential of three goods within this sector. A prerequisite for the advantages of sharing is that the goods are shared within the neighbourhood, since the transport causes an environmental load. For the convenience, sharing within a neighbourhood is also important, as is showed in the case study.

ShareNL (2015a) describes multiple scenarios for the usage of a power drill. In a scenario in which every household owns a power drill, every apparatus has an unused capacity of 85 percent. For 250 households, this implies 63.750 hours of unused drilling hours. In a scenario in which one power drill per five households is owned, the unused capacity is reduced to one percent (150 hours) and only a fifth of the machines has to be produced. When the power drill is used every weekend, 63 households can share one machine. The advantage of this scenario is that the power drill is replaced every 17 months, which allows the usage of the newest techniques.

Table 8: Useful life and unused capacity within home improvement and garden sector (Leismann et al., 2013: p. 191).

Devices	Average useful life	Maximum possible useful life	Unused capacity
Drill	45 hours in 15 years	300 hours in 15-25 years	255 hours
Lawnmower	375 hours in 15 years	400-600 hours in 15 years	25-225 hours
Scarifier	50 hours in 15 years	400 hours in 15 years	350 hours

The environmental effects of the other three sectors are less clear. For the automotive and yachts sector, the advantage is that less goods are produced. However, the intensity of usage might increase because of the access economy. De Vries and Te Riele (2006) and Vringer et al. (2001) indicate that the usage of products within these groups causes a high environmental load. For yachts, the sustainability effect is uncertain since most consumers would otherwise not have bought a yacht (shareNL, 2015a). Moreover, it is likely, that without the possibilities to rent a yacht, they would have done something less polluting in their spare time.

When people share cars with each other, cars are used more intensively (Leismann et al., 2013). Katzev (2003) shows that one car is needed instead of ten to fifteen. Since people are becoming more conscious about the variable costs per trip, they are bundling trips and making use of other modes of transport (walking, bicycling and public transit), causing a decline in the driven kilometres (Katzev, 2003). However, the availability of car sharing might also lead to an increased usage of cars (Katzev, 2003). Therefore, the exact effect of car sharing on the driven kilometres is not completely clear. Overall, the total result is likely to be positive because consumers would otherwise have bought a car and the production of cars is more polluting than the possible extra usage. This is confirmed by the study of the RIVM (personal interview I&M, 2017).

Within the fashion sector, the production is polluting and requires a lot of natural resources. Therefore, when the access economy reduces the consumption of clothes, this would contribute to a sustainable development. However, shared clothes are washed more often, which has a negative effect on the environment. LENA has partly solved this problem by offering an environmental friendly washing programme. Another problem within the fashion sector is the transport of clothes. Since there is only a small number of users, it is likely that the clothes always have to be transported a relatively long way from supplier to consumer. The Ellen MacArthur Foundation (2013) has performed a study into the effects of sharing clothes, including the costs of washing and transport, and concluded that overall the access economy contributes to a sustainable development within this sector. However, this study assumed the presence of a critical mass, which is – at least in the Netherlands – disputable.

6.2 Interpretation access economy

All studied sectors experience a changing environment and the financial crisis of 2009 caused a decrease of sales in the four sectors. However, the responses of the sectors differ. The yachts and automotive sector, which comprise the most expensive goods, shifted towards renting and leasing, also known as business-to-consumer sharing. The home improvement and garden sector also offers some business-to-consumer sharing services. Another response, seen within the home improvement and garden, fashion and to a lesser extent within the yachts sector, is a shift towards cheaper products.

Although the incumbents experience a changing environment, only the incumbents within the automotive sector believe in the conditions necessary for the access economy. Their experiences with business-to-consumer sharing and leasing activities provide confidence in the critical mass necessary for the access economy. Moreover, according to the incumbents, possible problems regarding trust can be solved by them or by service providers such as insurance companies. The consulted insurance companies also indicate that they are interested in offering special products for car sharing.

The other three sectors do not experience a changing environment in the form of the access economy. They do not believe that the critical mass is sufficiently present. The yachts sector experiences problems on the supply-side: owners are not willing to share their yacht because it has often been a large investment and is customised to their wishes. For tools and fashion, the problems are experienced on the demand-side. Since the products are relatively cheap and even become cheaper after the financial crisis, people do not see the advantage of borrowing it from others. The convenience is too low compared to owning the product. Although sharing platforms try to increase the convenience, this remains to be a problem.

Within all sectors, the lack of trust between strangers is regarded to be the most impeding factor for the access economy. Insurance companies can partly solve this problem by offering new insurances for the access economy. However, the insurance companies believe that it is not always their task to provide new products for the access economy. Moreover, the design of these new products is very difficult. The insurance companies believe that sharing platforms should invent a system to divide the risks over their users. Some platforms are already doing this. However, there are also risks that are very difficult to insure, but that are impeding the access economy.

6.3 Strategical considerations

6.3.1 Managerial cognition

The cognitive frame of the incumbents determines whether they should act and participate in the access economy. The incumbents within the home improvement and garden and fashion sector do not believe in the critical mass and therefore, they are not inclined to reconsider their business model. Their attention for the access economy is low. Especially among the incumbents within the fashion sector there is a high unfamiliarity about the access economy. Incumbents within the yachts sector have slightly more trust in the critical mass, but believe that the problems regarding trust are too big. Lastly, the automotive sector believes in a shift from ownership to access. Their actions are placed within the larger idea of mobility sharing.

The identity of the incumbents is also an important feature that determines the strategical considerations of businesses. All studied incumbents have an open environment in which new ideas can be discussed. However, they indicated that not all businesses in the studied sectors have this open environment. Especially within the home improvement and garden sector the retailers are very traditional and therefore they are not interested in new initiatives as the access economy. The dealers within the automotive sector are also traditional, but they are balanced by the innovative culture earlier in the value chain. Although the traditional character is one of the barriers of participation, it is not the only explaining factor.

Specific features of the identity of businesses also play a role in the decision to participate. The fashion sector for example, has an open environment, but sharing does often not fit within the reputation they want to have. Within the automotive sector it is also acknowledged that not every brand is equally suitable for the access economy. Another feature might be the personal character of a business. In the yachts sector for example, the incumbents indicate that they like their small business size and that this is more important than participation in the access economy, for which upscaling might be necessary.

For all incumbents, their experiences with the access economy or other innovations is critical for their search process into possibilities to participate within the access economy. Especially experiences with the access economy itself or business-to-consumer sharing are very important. Since both the experiences with consumer-to-consumer and business-to-consumer sharing are often negative, the incumbents do not want to participate or do not want to expand their participation in the access economy. The only sector with positive experiences is the automotive sector and this is also the only sector that is actively concerned with ways to participate.

6.3.2 Capabilities

Besides the interpretation of the access economy and the extent to which incumbents are interested in the access economy, the match with existing capabilities is important. The biggest problem regarding the capabilities is the extent to which products are suitable for the access economy. Except for the automotive sector, all sectors indicated that their products are not suitable for the access economy. The products are too customised, too big or the quality is too low. These product features are difficult and time-consuming to change. Because of the financial crisis, incumbents do often not have the resources to invest in attaining these types of new capabilities. Moreover, the incumbents often have chosen this type of products because of the financial crisis.

Another important capability is the capability to generate trust, which is possessed by all incumbents. Firstly, the incumbents represent strong brands, which increases the trust. This is especially the case for the yachts, automotive and fashion sector. Secondly, the incumbents often offer also maintenance services. These services increase the trust about the quality of the goods people borrow and about the state in which the goods are returned to the owner.

6.3.3 Business model

The studied sectors have a traditional business model of sales. The access economy asks for a completely new business model. Though, the incumbents indicate that the access economy might also advance their level of sales, since people get acquainted with their products and the incumbents become better aware of their target groups. For the fashion sector this is perceived to be an advantage

of the access economy. On the other hand, the incumbents in the yachts sector indicated that the users of shared yachts are a different target group than the buyers of yachts.

The incumbents (except for the fashion sector) also offer additional services besides the sale of goods. Examples are maintenance and repair, business-to-consumer sharing and leasing. These business models are closer to the business model needed for the access economy. Moreover, the access economy can strengthen these business models. For example, the maintenance section can be expanded when the business participates in the access economy. When the incumbents consider adaption of their business model, this is purely profit driven. They consider the access economy to be a mean to increase the income of their current business models.

In short, the strategic considerations of incumbents are mostly determined by their interpretation of the access economy. When the incumbents do not perceive a changing environment because of the access economy, they are unwilling to adjust their capabilities and/or business models. Moreover, incumbents' experiences with the access economy or related phenomena influence their decision to participate. Besides the suitability of the product, the incumbents mostly possess the capabilities necessary for the access economy. Since sales are most important for the incumbents, their business model has to change for participation in the access economy. However, they have often already adjusted the traditional businesses model of sales that can be extended to the access economy. Moreover, they indicate that the access economy might stimulate the existing business model. So, as displayed in Figure 9, the interpretation of the access economy and managerial cognition is the biggest barrier/stimulus for participation in the access economy.

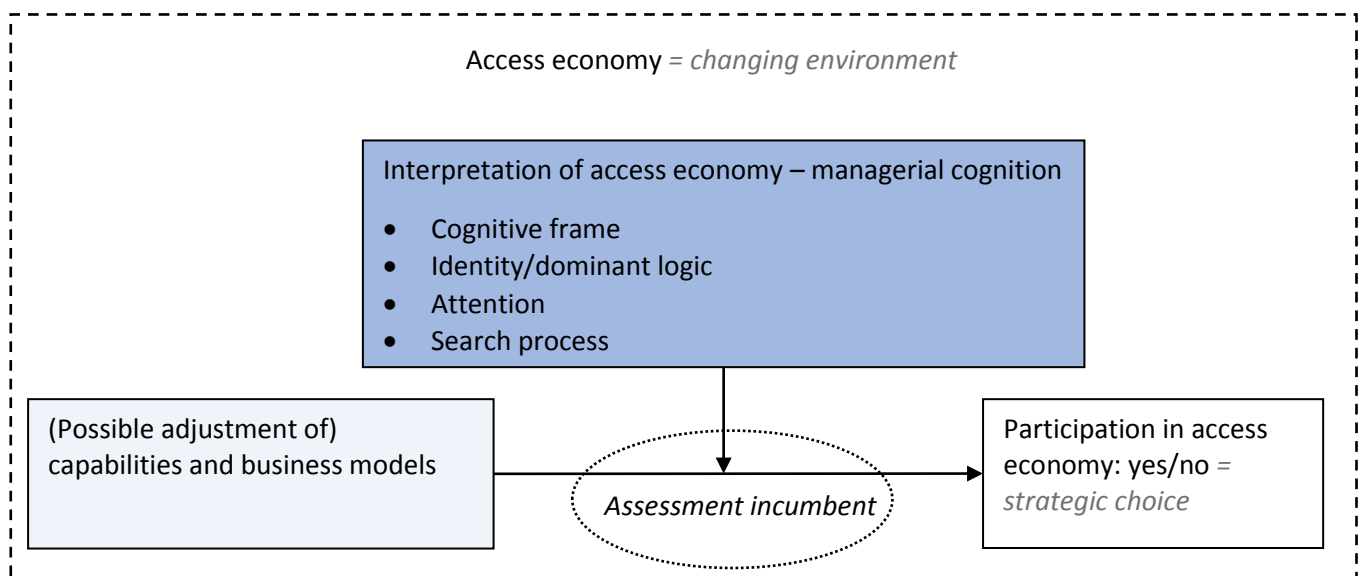


Figure 9: Main strategical considerations of incumbents – revised version of conceptual model (see Figure 5).

6.4 Role Dutch government

The incumbents all indicate that the developments regarding the access economy should come from the market. This coincides with view of the government, which has currently no policy in place to stimulate the access economy. Within the sectors, there are some specific issues that would improve the conditions of the access economy. Although the incumbents are not always aware of this, it is possible to bring these issues to the attention of the programme *Smart Regulation for Green Growth*. Moreover, it would help when the government is transparent about their intentions. The government tries to do this by setting up partnerships with the industries. Regulatory issues are mainly relevant for the yachts and automotive sector.

As indicated in the previous subsection, the main problem is that the incumbents do not believe in the critical mass necessary for the access economy. There are two possible situations. Firstly, the critical mass does indeed not exist. When this is the case, the government might decide to stimulate the access economy among the population. Though, the government will only decide to do this when there are positive environmental effects of the access economy. However, the discussed sharing networks all have a considerable number of members and are quite successful. Therefore, it is likely that the critical mass is present, but that the incumbents are unaware of it. There is a high degree of unfamiliarity among the incumbents. The government might decide to improve the provision of information among incumbents. This is also one of the aims of the green deal *Autodelen (car sharing)*. Moreover, it is very important to include the incumbents in the policy-making process, as is done within the transition agendas and green deals.

The central government only wants to stimulate the access economy when it contributes to sustainable development. However, the incumbents do often not experience the access economy (even when it is present) as a sustainable development. They participate in it because of a profit driven incentive and they believe that the users will also participate in it to generate extra income. It might be difficult to combine these two points of view into the policy-making process. The access economy is a mean for both the government and the incumbents. However, the end differs. Moreover, the end of the incumbents, to increase the amount of sales, contradicts with the aim of the government, to create a sustainable society.

7 Discussion

In Chapter 2, three branches of literature are described to identify possible strategic considerations of incumbents and possible roles of the Dutch government. In the following section, the results of the empirical study and the existing literature are compared and critically assessed. Firstly, the current knowledge about the access economy and the contribution of the access economy to a sustainable development is assessed. Subsequently, the extent to which the theory about strategic considerations of businesses can be extended to the access economy is discussed and lastly the role of the Dutch government is compared with the literature about governance modes.

7.1 Confrontation with literature about access economy

In the literature, a wide range of terms and definitions for the access economy is used. Also in practice, it is often not clear what is captured within the access economy. Especially the distinction between business-to-consumer and consumer-to-consumer sharing is often not fully recognised by the incumbents. The case studies confirm to a large extent the existing literature about the access economy. The incumbents acknowledge that convenience is important for consumers. Existing literature showed that the convenience is increased by the presence of a critical mass. However, incumbents often argue that they are not willing to participate in the access economy since the critical mass is absent. This thinking might result in a vicious circle. Incumbents can increase the convenience, which is necessary for a critical mass, but are not doing this since the critical mass is absent. In addition, the incumbents believe that a critical mass is absent because of a lack of trust between strangers, which is also acknowledged in the literature. Incumbents also expect that consumers are afraid that their goods will be damaged or soiled after sharing. They have also experienced this with business-to-consumer sharing. This item is partly captured in theory by the trust-condition, but not completely. Lastly, the literature identifies a belief in the commons as one of the conditions of the access economy. However, the incumbents do not see this as a necessary condition, since they can take up these tasks. The incumbents can offer the services that are captured in the belief in the commons, such as setting up a sharing platform (option 1 in Figure 3).

The theoretical framework suggests that both consumers and businesses are driven by financial motivations. The case studies confirm that financial incentives are very important for the incumbents. The sharing platforms that started as a start-up also often have a financial motivation. However, this is not always the case. There are also sharing platforms, for example Peerby and LENA, that have been founded with the aim to create a sustainable society. The participating incumbents in the fashion sector even indicate that they cooperate with LENA because of the non-profit character of the sharing platform. Within the fashion sector, the goodwill of LENA turns out to be important. Hence,

although financial incentives drive the access economy, they might also impede participation in the access economy by incumbents who have more sustainability related incentives.

7.1.1 Sustainable development

The fourth condition of the access economy is the presence of an idling capacity. The idling capacity of goods is also described as one of the reasons why the access economy might contribute to a sustainable development (shareNL, 2015a). Although there is an idling capacity within the studied sectors, this idling capacity cannot always be used for the access economy. Especially within the yachts and garden sector, the goods are unused most of the time, but everyone wants to use them at the same time. Therefore, the presence of an idling capacity is not always a sufficient condition of success.

From the four sectors, the described studies show that only the home improvement and garden sector certainly has a positive sustainability effect. Although this sector is promising from a sustainability point of view, the incumbents are not interested in participating in the access economy since they do not believe in the necessary critical mass. The automotive sector is the only sector in which the incumbents are highly interested in the access economy. The environmental impact of car sharing is less clear, but is likely to be positive. The incumbents within the yachts and fashion sector are critical towards the access economy. Before stimulating these incumbents to participate, the effect of the access economy within these sectors should become clearer.

7.2 Confrontation with literature about incumbents' strategic considerations

Within the theoretical model of strategic considerations, it is assumed that there is an interplay between managerial cognition and incumbents' capabilities and business models. The case studies proof this interplay. The businesses are only willing to adjust their capabilities and/or business models when there is a changing environment that threatens their current practices. However, the incumbents do often not consider the access economy as a threatening changing environment. The attention is therefore missing. The incumbents have changed their capabilities and business models after the financial crisis, but do not see the access economy as a similar threat. Another interplay between the incumbent's managerial cognition and capabilities is the interweaving of identity and capabilities, as is also acknowledged within the literature. The capabilities of incumbents are highly determined by their identity. This dependency complicates the participation in the access economy for some incumbents.

An important factor in considering participation in the access economy and the accompanying adjustments of capabilities and business models are experiences with earlier adaptations. These experiences determine to a large extent the search process of incumbents, as is expected by theory. Moreover, since the main business model is based on sales, this business model guides the search process. The incumbents are mainly interested in changing their business model or capabilities when

this directly increases their profits or when the new model improves their current traditional business model.

Figure 5 displays the conceptual model of strategic considerations. This study shows that the model of strategic considerations is applicable to the access economy since there is a clear interplay between managerial cognition and capabilities and business models. However, it might be possible that the changes caused by the access economy are not large enough to fully apply the model to these case studies. The incumbents are often unfamiliar with the access economy. This can be caused by a lack of attention. However, it is also possible that the changes caused by the access economy are smaller than assumed in this study.

7.3 Confrontation with literature about governance modes

The policy analysis showed that the Dutch government is currently in an exploratory phase. Within this phase, the government follows a case-by-case approach and relies heavily on the knowledge of non-governmental actors. Currently, there is a high degree of self-governance. Important instruments are green deals and transition agendas. Although these programmes are initiated by the government, the non-governmental actors play an important role in stimulating the access economy.

This study focused on the role of the Dutch government. However, the policy analysis showed that one cannot speak of 'the Dutch government'. The access economy is assessed at different levels (local, national and European) and within different departments. All actors within the government have a different point of view regarding the access economy. The theoretical framework described that the features of governance modes are interrelated. The analysis of the differences between the governmental departments confirms the interrelation. The ministries have different goals regarding the access economy and therefore, they implement different instruments. These differences result in different roles for non-governmental actors.

The role of the various actors also differs between the sectors operating in the access economy. Municipalities play for example an important role in the yachts and automotive sector because of the granting of licenses, but are less important within the home improvement and garden and fashion sector. Because of the differences within the government and between the sectors, it is difficult to provide a comprehensive assessment of the role of the government. Moreover, since the policy regarding the access economy is still evolving, it is difficult to determine the governance mode that is in place.

8 Conclusion

By performing a multiple case study of Dutch incumbents that participate or might participate in the access economy, the strategic considerations of incumbents to participate in the access economy and the role of the government is studied. The following research question is answered in this study: *which strategic considerations affect to what extent the participation of Dutch incumbent businesses in the access economy and to what extent does government policy affect these strategic considerations?*

The theoretical model predicts that there is an interplay between the managerial cognition within a business and the capabilities and business models of a business. The case studies confirm this interplay. Most of the studied incumbents do not experience a changing environment because of the access economy. Therefore, there is not enough attention for the access economy. An important exception is the automotive sector, in which there is attention for the access economy. Because the incumbents are unfamiliar with or do not believe in the changing environment, mainly since they do not believe in the presence of a critical mass and trust between strangers, they are often unwilling to participate in the access economy. Another strategic consideration is the experience with earlier adaptations. These experiences guide participation in the access economy.

Incumbents' capabilities and business models also determine their strategic considerations. The products (a capability of the incumbent) are often unsuitable for the access economy, which impedes participation. Moreover, the traditional business model is based on selling products, which is the opposite of the access economy. The incumbents are mainly willing to participate when the access economy can improve the current business model or generates more profits than the traditional model. So, for most incumbents the access economy is a mean instead of an end.

The second part of the research question studies the role of the Dutch government. The policy analysis showed that governmental activities are still explorative and follow a case-by-case approach. Firstly, the government removes regulation that impedes the access economy when this does not harm other public interests. Since the incumbents indicate that regulation might impede their participation in the access economy, this policy positively affects the strategic considerations of incumbents. The Ministry of I&M is moreover looking for ways to stimulate the access economy together with non-governmental actors and is currently working on transition agendas for different sectors within the access economy. However, the studied incumbents indicate that the access economy should be initiated by the industry. Therefore, it is questionable whether this policy will affect the access economy. Recommendations to the government to stimulate incumbents' participation are formulated in the next subsection.

8.1 Recommendations to Dutch government

The second objective of this study is to formulate recommendations to the Dutch government based on the insights obtained by the case studies and policy analysis. Both the incumbents and the government indicate that the access economy should be initiated by the market. This study therefore recommends the government to leave the responsibility of the access economy at the market. However, the government can stimulate the participation of the businesses. Firstly, it should continue with removing impeding regulation. Since the incumbents mostly experience impeding regulations at the local level, the central government should stimulate municipalities to do the same. Secondly, the incumbents should be included more often in the policy programmes. This way, incumbents become more familiar with the access economy. Moreover, the incumbents should be better informed about the possibilities of the access economy, which can also be achieved by including the incumbents in the policy making process. Lastly, the government should be transparent towards incumbent businesses. This reduces the information asymmetry between incumbents and the government and thereby can stimulate participation.

The previous chapters discussed the sustainability effect of the access economy. The Dutch government indicated that the access economy is a mean to stimulate sustainable development. Therefore, the government should mainly focus on the sectors in which there is a high potential for sustainable development, such as the home improvement and garden sector. Although there might not be a critical mass yet within this sector, it might be meaningful to become more proactive and already search for ways to stimulate it or to overcome certain barriers. In addition, the government should have a broader interpretation of the access economy than deployed in this study. This study only focuses on consumer-to-consumer sharing, but to achieve a more sustainable life cycle of goods, it is also interesting to include business-to-consumer sharing and the second-hand market. It might be possible that participants in these developments are dealing with the same issues.

Lastly, problematic within the current approach of the Dutch government is that there are different departments and levels of the government engaged with the access economy. However, the departments and levels of government are unaware of each other's activities. This study would therefore recommend organising more collaboration and an interdepartmental consultation between the different actors within the government to discuss the access economy. Within this collaboration, the ministries should make clear what is understood by the access economy and what they would like to achieve. Although the departments will have different points of view, it is useful to be aware of each other's wishes. Especially since the government is currently in an explorative phase, this consultation might be very useful and might help to become more proactive. By having an interdepartmental consultation, different aspects of the access economy can be assessed and a more holistic approach

can be adopted. Spaargaren (2011) confirms the importance of including multiple points of view. By establishing cooperation between the departments, stimulation of social features of the access economy (for example the creation of a critical mass) and more technical features (for example parking licenses or rules regarding online platforms) can be coordinated. Moreover, the ministries and levels of government can make use of each other's knowledge. This prevents redundant studies and enables the government to respond faster and to be more proactive to societal developments. Lastly, by coordinating the policy, the incumbents obtain a more accurate picture of the governmental activities.

8.2 Limitations and further research

This study provides more insight into the strategic considerations of incumbent businesses within four sectors. Although similar strategic considerations are recognised within the studied sectors, it would be interesting to extend this research towards other sectors. Especially the role of the government might differ within other sectors, since it also differed between the four studied cases. Moreover, it would be interesting to have a broader range of businesses. A limitation of this study is that there might be a bias in the selection of the respondents. The respondents willing to cooperate often already have an opinion about the access economy. In some sectors, it was difficult to motivate respondents to participate in the study. Though, unwillingness to participate is also an interesting result. For further research, it would be interesting to incorporate these businesses.

One of the conclusions is that the incumbents do not experience a changing environment. Though, the sharing platforms do experience a changing environment. The body of knowledge about the access economy would improve by an assessment of the current state of the access economy. This assessment should include the attitude of consumers and the effects on sustainable development. By having this information, it can be judged whether the incumbents are right when they argue that they do not believe in the access economy. Moreover, it can be assessed whether the government should stimulate the access economy.

This study focuses solely on the Netherlands. The European agenda indicates that the access economy is also occurring in other European countries. Moreover, in the United States there are various examples of the access economy. It is interesting for further research to study other countries. Both the strategic considerations of foreign incumbents and the role of other governments are interesting to compare with this research.

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Appendix 1 – Overview data sources

Resource object	Data source	Accessing
<i>Sub-question 1 – overview of possibilities businesses</i>		
Media	Websites of businesses	Content analysis
	Press releases of businesses	Content analysis
	Related news websites	Content analysis
	Websites of related organisations	Content analysis
Process	Representatives of Dutch sharing platforms	Individual face-to-face interviews
<i>Sub-question 2 – strategic considerations in the literature</i>		
Literature	Literature about drivers of the access economy	Search methods
	Literature about motivations to participate in access economy (consumers and businesses)	Search methods
	Literature about capabilities and cognitions of incumbents	Search methods
<i>Sub-question 3 & 4 – strategic considerations in practice</i>		
Process	Representatives Dutch incumbents, concerned with access economy	Individual face-to-face interviews
<i>Sub-question 5 – overview of policy</i>		
Document	Existing Dutch policies, green deals and other policy documentation regarding access economy	Content analysis
<i>Sub-question 6 – link between strategic considerations and policy</i>		
Literature	Findings from research questions 1-5	Content analysis
Process	Representatives of Dutch government, concerned with participation of businesses in access economy and representatives of businesses	Individual face-to-face interviews
	Representatives of Dutch incumbents, concerned with access economy	Individual face-to-face interviews
	Representatives of Dutch sharing platforms	Individual face-to-face interviews

Appendix 2 – Overview respondents

The table below provides an overview of the respondents. Because of confidentiality, some respondents indicated that they want to stay anonymous, only the functions and organisations of the respondents are reported.

Function	Organisation
Sales and marketing	Linssen Yachts
Owner	Holiday Boatin Doerak Sneek
Owner	Jachthaven Meppel
Marketing	Pon
Marketing manager	Auto Hoogenboom
HR Business Partner	General Motors/Opel Netherlands
Adjunct director	Tuinbranche Nederland
Founder	Warentuin
Owner	Eco-logisch
Owner – consultant	GW Agency
Owner	Pulp
Owner	Alexandra Frida
Owner	Joline Jolink
Marketing	Centraal Beheer
Marketing	Delta Lloyd
Founder	Barqo
Founder	Peerby
Founder	LENA
Project manager green deals	Ministry of Infrastructure and Environment
Project leader access economy within programme Smart Regulation for Green Growth	Ministry of Economic Affairs