INTERNATIONAL WORKSHOP AGREEMENT

IWA 27

First edition 2017-09

Guiding principles and framework for the sharing economy

Principes directeurs et cadre de travail pour l'économie du partage

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Introduction	Contents		Page
1 Scope 1 2 Normative references 1 3 Terms and definitions 1 4 Guiding principles — Platform operators and providers 2 4.1 General 2 4.2 Integrity 2 4.3 Transparency 2 4.4 Accountability 2 4.5 Accessibility and inclusion 2 4.6 Responsiveness 3 4.7 Health, safety and environment 3 4.8 Confidentiality, privacy and security 3 4.9 Capacity 3 4.10 Competence 3 4.11 Continual improvement 3 5.1 General Ten STANDARD PREVIEW 3 5.2 Customers 3 5.3 Labour (standards.iteh.a) 5.4 Government 5 5.5 Environment 5 5.5 Environment 5 5.6 Broader economic, societal and community impacts and opportunities 5 5.6	Forew	ord	iv
1 Scope 1 2 Normative references 1 3 Terms and definitions 1 4 Guiding principles — Platform operators and providers 2 4.1 General 2 4.2 Integrity 2 4.3 Transparency 2 4.4 Accountability 2 4.5 Accessibility and inclusion 2 4.6 Responsiveness 3 4.7 Health, safety and environment 3 4.8 Confidentiality, privacy and security 3 4.9 Capacity 3 4.10 Competence 3 4.11 Continual improvement 3 5.1 General Ten STANDARD PREVIEW 3 5.2 Customers 3 5.3 Labour (standards.iteh.a) 5.4 Government 5 5.5 Environment 5 5.5 Environment 5 5.6 Broader economic, societal and community impacts and opportunities 5 5.6	Introd	luction	v
2 Normative references 1 3 Terms and definitions 1 4 Guiding principles — Platform operators and providers 2 4.1 General 2 4.2 Integrity 2 4.3 Transparency. 2 4.4 Accountability 2 4.5 Accessibility and inclusion 2 4.6 Responsiveness. 3 4.7 Health, safety and environment 3 4.8 Confidentiality, privacy and security. 3 4.9 Capacity. 3 4.10 Competence 3 4.11 Continual improvement 3 5.1 General Tech STANDARD PREVIEW 3 5.1 General Tech STANDARD PREVIEW 3 5.1 Labour (standards.iteh.ai) 4 5.1 General Tech STANDARD PREVIEW 3 5.1 General			
3 Terms and definitions	_	•	
4 Guiding principles — Platform operators and providers 2 4.1 General 2 4.2 Integrity 2 4.3 Transparency 2 4.4 Accountability 2 4.5 Accessibility and inclusion 2 4.6 Responsiveness 3 4.7 Health, safety and environment 3 4.8 Confidentiality, privacy and security 3 4.9 Capacity 3 4.10 Competence 3 4.11 Continual improvement 3 5.1 General STANDARD PREVIEW 5.1 General 4 5.2 Customers 4 5.3 Labour (standards.itch.ai) 5 5.4 Government 5 5.5 Environment 5 5.6 Broader economic, societal and community impacts and opportunities 5 intractions the incurrence of the incurren			
4.1 General 2 4.2 Integrity 2 4.3 Transparency 2 4.4 Accountability 2 4.5 Accessibility and inclusion 2 4.6 Responsiveness 3 4.7 Health, safety and environment 3 4.8 Confidentiality, privacy and security 3 4.9 Capacity 3 4.10 Competence 3 4.11 Continual improvement 3 5.1 General Tech STANDARD PREVIEW 3 5.2 Customers 4 5.3 Labour (standards.itch.ai) 4 5.4 Government 5 5.5 Environment 5 5.6 Broader economic, societal and community impacts and opportunities 5 5.5 Environment 5 5.6 Broader economic, societal and community impacts and opportunities 5 5.6 Broader economic, societal and community impacts and opportunities 5 6 Feedback, review and continual improvement. 5	3	Terms and definitions	1
4.2 Integrity 2 4.3 Transparency. 2 4.4 Accountability 2 4.5 Accessibility and inclusion 2 4.6 Responsiveness. 3 4.7 Health, safety and environment. 3 4.8 Confidentiality, privacy and security. 3 4.9 Capacity. 3 4.10 Competence. 3 4.11 Continual improvement. 3 5.1 General Tent STANDARD PREVIEW 3 5.2 Customers. 4 5.3 Labour \$tandards.itch. 5.4 Government. 5 5.5 Environment. 5 5.6 Broader economic, societal and community impacts and opportunities 5 https://standards.ich.acandostandards.sst.24 d22a9-53a8-402d-90ea- 5 6 Feedback, review and continual improvementour. 5 5 Annex A (informative) Operationalizing the principles 6 6 Annex B (informative) Guidance on handling comments and complaints 8 Annex E (informative) Guidance for platform operat	4		
4.3 Transparency 2 4.4 Accountability 2 4.5 Accessibility and inclusion 2 4.6 Responsiveness 3 4.7 Health, safety and environment 3 4.8 Confidentiality, privacy and security 3 4.9 Capacity 3 4.10 Competence 3 4.11 Continual improvement 3 5 Sharing economy decision-making and action framework 3 5.1 General Text STANDARD PREVIEW 3 5.2 Customers (standards.itch.ai/atth.			
4.4 Accountability 2 4.5 Accessibility and inclusion 2 4.6 Responsiveness 3 4.7 Health, safety and environment 3 4.8 Confidentiality, privacy and security 3 4.9 Capacity 3 4.10 Competence 3 4.11 Continual improvement 3 5 Sharing economy decision-making and action framework 3 5.1 General Continual improvement 3 5.2 Customers Customers 5.3 Labour 4 5.4 Government 5 5.5 Environment 5 5.6 Broader economic, societal and community impacts and opportunities 5 butys/standards in a catalogy standards/sist/24 (d2249-538-402d-90ca-6) 5 6 Feedback, review and continual improvement 5 5 Annex A (informative) Operationalizing the principles 6 6 Annex B (informative) Guidance on handling comments and complaints 8 Annex C (informative) Guidance for platform operators 9 An			
4.5 Accessibility and inclusion 2 4.6 Responsiveness 3 4.7 Health, safety and environment 3 4.8 Confidentiality, privacy and security 3 4.9 Capacity 3 4.10 Competence 3 4.11 Continual improvement 3 5.1 General Tech STANDARD PREVIEW 3 5.2 Customers Customers Characteristics 4 5.3 Labour (standards.iteh.ai) 4 5.4 Government (standards.iteh.ai) 5 5.5 Environment Standards.iteh.aicetalogstandards.sis/24/d2249-5388-4024-90ca 5 6 Feedback, review and continual improvement.017 5 Annex A (informative) Operationalizing the principles 6 Annex B (informative) Guidance on handling comments and complaints 8 Annex C (informative) Guidance for platform operators 9 Annex E (informative) Guidance for interested parties 10 Annex G (informative) International guidelines 13 Annex H (informative) Workshop contributors 15			
4.6 Responsiveness. 3 4.7 Health, safety and environment. 3 4.8 Confidentiality, privacy and security. 3 4.9 Capacity. 3 4.10 Competence. 3 4.11 Continual improvement. 3 5 Sharing economy decision-making and action framework. 3 5.1 General Text STANDARD PREVIEW. 3 5.2 Customers. 4 5.3 Labour. (standards.iteh.ai). 4 5.4 Government. 5 5.5 Environment. 5 5.6 Broader economic, societal and community impacts and opportunities. 5 5.6 Broader economic, societal and community impacts and opportunities. 5 6 Feedback, review and continual improvement. 5 6 Feedback, review and continual improvement. 5 6 Annex A (informative) Operationalizing the principles. 6 6 Annex B (informative) Guidance on handling comments and complaints. 8 6 Annex C (informative) Guidance for platform operators. 9 7 Annex D (informative) Guidance for providers. 10 7 Annex E (informative) Guidance for interested parties. 11 7 Annex F (informative) Guidance for interested parties. 12 8 Annex G (informative) International guidelines. 13 8 Annex H (informative) Workshop contributors. 15			
4.7 Health, safety and environment 4.8 Confidentiality, privacy and security 3 4.9 Capacity 3.10 Competence 3.11 Continual improvement 3.5 Sharing economy decision-making and action framework 3.5.1 General trueh STANDARD PREVIEW 3.5.2 Customers of STANDARD PREVIEW 4.5.3 Labour (standards.iteh.ai) 5.4 Government 5.5 Environment 5.5 Environment 5.6 Broader economic, societal and community impacts and opportunities 5.6 Feedback, review and continual improvement 5.7 Annex A (informative) Operationalizing the principles 6 Annex B (informative) Guidance on handling comments and complaints 8 Annex C (informative) Guidance for platform operators 9 Annex D (informative) Guidance from the customer's perspective 11 Annex F (informative) International guidelines 13 Annex H (informative) Workshop contributors 15			
4.8 Confidentiality, privacy and security. 4.9 Capacity 3.4.10 Competence. 3.4.11 Continual improvement. 3.5 Sharing economy decision-making and action framework 3.5.1 General Tech STANDARD PREVIEW 3.5.2 Customers. 4.5.3 Labour (standards.iteh.ai) 5.4 Government. 5.5 Environment. 5.6 Broader economic, societal and committee and opportunities. 5.6 Broader economic, societal and committee and opportunities. 5.6 Feedback, review and continual improvement. 5.7 Annex A (informative) Operationalizing the principles. 5.8 Annex B (informative) Guidance on handling comments and complaints. 5.8 Annex C (informative) Guidance for platform operators. 5.9 Annex D (informative) Guidance for providers. 5.0 Annex E (informative) Guidance from the customer's perspective. 5.0 Annex F (informative) Guidance for interested parties. 5.1 General Tech STANDARD PREVIEW. 5.2 Annex G (informative) International guidelines. 5.3 Labour (standards.iteh.ai/a.i.) 5.4 Government (standards.iteh.ai/a.i.) 5.5 Environment (standards.iteh.ai/a.i.) 5.6 Broader economic, societal and committee and opportunities. 5.7 Environment (standards.iteh.ai/a.i.) 5.8 Annex A (informative) Operationalizing the principles. 5.9 Annex B (informative) Guidance for platform operators. 5.0 Feedback, review and continual simprovement. 5.1 Annex E (informative) Guidance for platform operators. 5.1 Annex F (informative) Guidance from the customer's perspective. 5.1 Annex F (informative) Undence for interested parties. 5.1 Annex H (informative) Workshop contributors. 5.1 Annex H (informative) Workshop contributors. 5.2 Customers (standards.iteh.ai/a.interested parties. 5.3 Labour (standards.iteh.ai/a.interested parties. 5.4 Annex H (informative) Workshop contributors. 5.5 Customers (standards.iteh.ai/a.interested parties. 5.6 Environment (standards.iteh.ai/a.interested parties. 5.7 Annex H (informative) Workshop contributors. 5.8 Annex H (informative) Workshop contributors. 5.9 Annex H (informative) Workshop contributors. 5.0 Annex H (informative) Workshop contributors.		4.6 Responsiveness	3
4.9 Capacity 4.10 Competence 3 4.11 Continual improvement 3 5 Sharing economy decision-making and action framework 3 5.1 General: Ten STANDARD PREVIEW 4 5.3 Labour (standards.iten.ai) 5.4 Government 5.5 Environment 5.6 Broader economic, societal and comfill unity impacts and opportunities. 15 broader economic, societal and comfill unity impacts and opportunities. 15 Feedback, review and continual improvement of standards/sist/24/d2249-53a8-402d-90ea- 6 Feedback, review and continual improvement of standards/sist/24/d2249-53a8-402d-90ea- 5 Annex A (informative) Operationalizing the principles 6 Annex B (informative) Guidance on handling comments and complaints 8 Annex C (informative) Guidance for platform operators 9 Annex D (informative) Guidance for providers 10 Annex E (informative) Guidance from the customer's perspective 11 Annex F (informative) Guidance for interested parties 12 Annex G (informative) International guidelines 13 Annex H (informative) Workshop contributors 15			
4.10 Competence 4.11 Continual improvement 3 Sharing economy decision-making and action framework 3 5.1 General Ten STANDARD PREVIEW 4 5.3 Labour (standards.iteh.ai) 5.4 Government 5.5 Environment 5.6 Broader economic, societal and community impacts and opportunities 5.6 Feedback, review and continual improvement 6 Feedback, review and continual improvement 6 Annex A (informative) Operationalizing the principles 6 Annex B (informative) Guidance on handling comments and complaints 8 Annex C (informative) Guidance for platform operators 9 Annex D (informative) Guidance for providers 10 Annex F (informative) Guidance for interested parties 11 Annex G (informative) International guidelines 13 Annex H (informative) Workshop contributors 15			
4.11 Continual improvement 3 5 Sharing economy decision-making and action framework 3 5.1 General Ten STANDARD PREVIEW 4 5.2 Customers 4 5.3 Labour (Standards.iteh.ai) 4 5.4 Government 5 5.5 Environment 5 5.6 Broader economic, societal and community impacts and opportunities 5 https://standards.iteh.ai/catalog/standards/sist/241d22a9-53a8-402d-90ca-66 Feedback, review and continual improvement 6017 5 Annex A (informative) Operationalizing the principles 6 Annex B (informative) Guidance on handling comments and complaints 8 Annex C (informative) Guidance for platform operators 9 Annex D (informative) Guidance for providers 10 Annex E (informative) Guidance from the customer's perspective 11 Annex F (informative) Guidance for interested parties 12 Annex G (informative) International guidelines 13 Annex H (informative) Workshop contributors 15			
5 Sharing economy decision-making and action framework 5.1 General: Teh STANDARD PREVIEW 4 5.2 Customers 4 5.3 Labour (standards.iteh.ai) 5.4 Government 5.5 Environment 5.6 Broader economic, societal and community impacts and opportunities 5.6 Broader economic, societal and community impacts and opportunities 5 6 Feedback, review and continual improvement 6 6 Feedback, review and continual improvement 7 5 6 Annex A (informative) Operationalizing the principles 6 Annex B (informative) Guidance on handling comments and complaints 8 6 Annex C (informative) Guidance for platform operators 9 7 8 Annex D (informative) Guidance for providers 10 9 9 9 9 9 9 9 9 9 9 9 9 9 9 9 9 9 9			
5.3 Labour (Standards.iteh.ai) 5.4 Government 5.5 Environment 5.5 Environment 5.6 Broader economic, societal and community impacts and opportunities 5.6 Broader economic, societal and community impacts and opportunities 5.6 Feedback, review and continual improvement 6.6 Feedback, review and continual improvement 6.6 Feedback, review and continual improvement 6.6 Annex A (informative) Operationalizing the principles 6 Annex B (informative) Guidance on handling comments and complaints 8 Annex C (informative) Guidance for platform operators 9 Annex D (informative) Guidance for providers 10 Annex E (informative) Guidance from the customer's perspective 11 Annex F (informative) Guidance for interested parties 12 Annex G (informative) International guidelines 13 Annex H (informative) Workshop contributors 15	5	Sharing economy decision-making and action framework	3
5.3 Labour (Standards.iteh.ai) 5.4 Government 5.5 Environment 5.5 Environment 5.6 Broader economic, societal and community impacts and opportunities 5.6 Broader economic, societal and community impacts and opportunities 5.6 Feedback, review and continual improvement 6.6 Feedback, review and continual improvement 6.6 Feedback, review and continual improvement 6.6 Annex A (informative) Operationalizing the principles 6 Annex B (informative) Guidance on handling comments and complaints 8 Annex C (informative) Guidance for platform operators 9 Annex D (informative) Guidance for providers 10 Annex E (informative) Guidance from the customer's perspective 11 Annex F (informative) Guidance for interested parties 12 Annex G (informative) International guidelines 13 Annex H (informative) Workshop contributors 15		5.1 General Annual Annu	3
5.5 Environment 5.6 Broader economic, societal and community impacts and opportunities 5.6 Broader economic, societal and community impacts and opportunities 5 https://standards.iteh.ai/catalog/standards/sist/241d22a9-53a8-402d-90ea-6 Feedback, review and continual improvement 6017 5 5 Annex A (informative) Operationalizing the principles 6 Annex B (informative) Guidance on handling comments and complaints 8 Annex C (informative) Guidance for platform operators 9 Annex D (informative) Guidance for providers 10 Annex E (informative) Guidance from the customer's perspective 11 Annex F (informative) Guidance for interested parties 12 Annex G (informative) International guidelines 13 Annex H (informative) Workshop contributors 15		5.2 Customers	4
5.5 Environment 5.6 Broader economic, societal and community impacts and opportunities 5.6 Broader economic, societal and community impacts and opportunities 5 https://standards.iteh.ai/catalog/standards/sist/241d22a9-53a8-402d-90ea-6 Feedback, review and continual improvement 6017 5 5 Annex A (informative) Operationalizing the principles 6 Annex B (informative) Guidance on handling comments and complaints 8 Annex C (informative) Guidance for platform operators 9 Annex D (informative) Guidance for providers 10 Annex E (informative) Guidance from the customer's perspective 11 Annex F (informative) Guidance for interested parties 12 Annex G (informative) International guidelines 13 Annex H (informative) Workshop contributors 15		5.3 Labour (standards.iteh.ai)	4
5.6 Broader economic, societal and community impacts and opportunities https://standards.itch.ai/catalog/standards/sist/24 Id22a9-53a8-402d-90ea- 6 Feedback, review and continual improvement of the principles formative and continual improvement of the principles formative and complaints for platform operators for platform operators for platform operators for platform operators for providers for formative for interested parties for formative formative for interested parties for providers for interested parties for formative f			
Annex A (informative) Operationalizing the principles6Annex B (informative) Guidance on handling comments and complaints8Annex C (informative) Guidance for platform operators9Annex D (informative) Guidance for providers10Annex E (informative) Guidance from the customer's perspective11Annex F (informative) Guidance for interested parties12Annex G (informative) International guidelines13Annex H (informative) Workshop contributors15		5.5 Environment	5
Annex A (informative) Operationalizing the principles6Annex B (informative) Guidance on handling comments and complaints8Annex C (informative) Guidance for platform operators9Annex D (informative) Guidance for providers10Annex E (informative) Guidance from the customer's perspective11Annex F (informative) Guidance for interested parties12Annex G (informative) International guidelines13Annex H (informative) Workshop contributors15		5.6 Broader economic, societal a nd commu nity impacts and opportunitieshttps://standards.iteh.ai/catalog/standards/sist/241d22a9-53a8-402d-90ea-	5
Annex B (informative) Guidance on handling comments and complaints 8 Annex C (informative) Guidance for platform operators 9 Annex D (informative) Guidance for providers 10 Annex E (informative) Guidance from the customer's perspective 11 Annex F (informative) Guidance for interested parties 12 Annex G (informative) International guidelines 13 Annex H (informative) Workshop contributors 15	6	Feedback, review and continual improvement 017	5
Annex C (informative) Guidance for platform operators9Annex D (informative) Guidance for providers10Annex E (informative) Guidance from the customer's perspective11Annex F (informative) Guidance for interested parties12Annex G (informative) International guidelines13Annex H (informative) Workshop contributors15	Annex	A (informative) Operationalizing the principles	6
Annex D (informative) Guidance for providers 10 Annex E (informative) Guidance from the customer's perspective 11 Annex F (informative) Guidance for interested parties 12 Annex G (informative) International guidelines 13 Annex H (informative) Workshop contributors 15	Annex	B (informative) Guidance on handling comments and complaints	8
Annex D (informative) Guidance for providers 10 Annex E (informative) Guidance from the customer's perspective 11 Annex F (informative) Guidance for interested parties 12 Annex G (informative) International guidelines 13 Annex H (informative) Workshop contributors 15	Annex	c C (informative) Guidance for platform operators	9
Annex E (informative) Guidance from the customer's perspective 11 Annex F (informative) Guidance for interested parties 12 Annex G (informative) International guidelines 13 Annex H (informative) Workshop contributors 15	Annex	z D (informative) Guidance for providers	10
Annex F (informative) Guidance for interested parties12Annex G (informative) International guidelines13Annex H (informative) Workshop contributors15		· ·	
Annex G (informative) International guidelines 13 Annex H (informative) Workshop contributors 15			
Annex H (informative) Workshop contributors15		•	
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Foreword

ISO (the International Organization for Standardization) is a worldwide federation of national standards bodies (ISO member bodies). The work of preparing International Standards is normally carried out through ISO technical committees. Each member body interested in a subject for which a technical committee has been established has the right to be represented on that committee. International organizations, governmental and non-governmental, in liaison with ISO, also take part in the work. ISO collaborates closely with the International Electrotechnical Commission (IEC) on all matters of electrotechnical standardization.

The procedures used to develop this document and those intended for its further maintenance are described in the ISO/IEC Directives, Part 1. In particular the different approval criteria needed for the different types of ISO documents should be noted. This document was drafted in accordance with the editorial rules of the ISO/IEC Directives, Part 2 (see www.iso.org/directives).

Attention is drawn to the possibility that some of the elements of this document may be the subject of patent rights. ISO shall not be held responsible for identifying any or all such patent rights. Details of any patent rights identified during the development of the document will be in the Introduction and/or on the ISO list of patent declarations received (see www.iso.org/patents).

Any trade name used in this document is information given for the convenience of users and does not constitute an endorsement.

For an explanation on the voluntary nature of standards, the meaning of ISO specific terms and expressions related to conformity assessment, as well as information about ISO's adherence to the World Trade Organization (WTO) principles in the Technical Barriers to Trade (TBT) see the following URL: www.iso.org/iso/foreword.html. (standards.iteh.ai)

International Workshop Agreement IWA 27 was approved at a workshop hosted by the Standards Council of Canada (SCC), in association with the CSA Group and the federal government's Innovation, Science and Economic Development Canada Office of Consumer Affairs (OCA), held in Toronto, Canada, in March 2017.

Introduction

A combination of technological and other factors have enabled the sharing economy. The rise in global usage of mobile devices together with changing consumer behaviour are driving its growth. This document provides principles and a practical implementation framework with the intention of making participation in the sharing economy a positive experience for all interested and affected parties.

The activities associated with the sharing economy in some ways challenge traditional business models. The sharing economy includes transactions for a fee or free, matching often-underused assets and skills with customer needs, and can provide reserve capacity for managing impacts of planned and unforeseen events. Customers and providers are typically unknown to one another and trust is often initially absent. Sharing economy participants often use reviews, customized for specific products and services and usually involving mutual ratings of providers and customers in addition to other trust-building mechanisms, such as guarantees of compensation for non-conformance.

The sharing economy presents both opportunities and challenges:

- customers can find improved prices, options and social interaction, but question trustworthiness, quality, safety, reliability and validity of online reviews;
- providers can welcome flexible work arrangements and access to new income opportunities, but face challenges with respect to benefits, insurance, security and other economic and safety protections;
- platform providers can seek broader market access and economic opportunities, but can face challenges with respect to meeting legal requirements while assuring technological reliability, data integrity, securing customer privacy and safeguarding consumer rights;
- governments can welcome the broader contributions to economic growth, innovation and improved social trust networks associated with the sharing economy, but can also need to formulate public policy that is responsive to the changes 7associated with the sharing economy, develop new taxation mechanisms, and address collateral disruptions and transformations affecting traditional businesses; and 1361505a3946/iwa-27-2017
- other parties that are not directly involved in sharing economy activities can find the activities to be socially disruptive, but can also find new opportunities and positive environmental impacts as the sharing economy evolves.

This document is the result of an open and transparent multi-stakeholder process involving experts from different countries representing a variety of different perspectives. It is a voluntary guidance document intended for global use. This document, in its present or revised form, could also provide the basis for a future ISO standard or for future private sector, institutional or government guidelines.

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Guiding principles and framework for the sharing economy

1 Scope

This document provides guiding principles and a framework for decision making and action to address key social, environmental, and economic impacts and opportunities of the sharing economy.

2 Normative references

There are no normative references in this document.

3 Terms and definitions

For the purposes of this document, the following terms and definitions apply.

ISO and IEC maintain terminological databases for use in standardization at the following addresses:

- ISO Online browsing platform: available at https://www.iso.org/obp
- IEC Electropedia: available at http://www.electropedia.org/

3.1

sharing economy

(standards.iteh.ai)

form of economic activity where *platforms* (3.2) enable *providers* (3.4) and *customers* (3.5) to exchange, often underutilized, goods and services using information technology

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Note 1 to entry: It is

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- a) often peer-to-peer;
- b) for a fee or for free:
- c) often sequential use; and
- d) mutually beneficial.

3.2

platform

information technology mechanisms that facilitate the ability for transactions to take place between those who have assets and services and those who want to use those assets and services

3.3

platform operator

individual or entity that administers a sharing economy (3.1) platform (3.2)

3.4

provider

individual or entity that provides assets or services to *customers* (3.5) who want access to those assets or services, using a *sharing economy* (3.1) *platform* (3.2)

3.5

customer

person or organization that uses a sharing economy (3.1) provider's (3.4) assets or services

Note 1 to entry: For the purposes of this document, the term "customer" includes potential customers.

3.6

interested party

person or organization that can affect, be affected by, or perceive itself to be affected by a decision or activity

4 Guiding principles — Platform operators and providers

4.1 General

In their activities associated with the sharing economy, platform operators and providers should adhere to the following guiding principles:

- a) integrity;
- b) transparency;
- c) accountability;
- d) accessibility and inclusion;
- e) responsiveness;
- f) health, safety and environment;
- g) confidentiality, privacy and security; TANDARD PREVIEW
- h) capacity;

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- i) competence; and
- i) continual improvement.

IWA 27:2017

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NOTE 1 Guiding principles are also applicable to the relationship between platform operators and providers.

NOTE 2 See Annex A for guidance on operationalizing the principles.

4.2 Integrity

Decisions and activities are conducted in an honest, respectful and courteous manner, taking into account the interests of customers, and are communicated accurately.

4.3 Transparency

Decisions and activities affecting customers and others are findable, usable, relevant, timely and accurate to allow customers and others to make informed decisions.

4.4 Accountability

Decisions and activities and their impacts and opportunities with respect to customers and others are open to scrutiny by governing bodies, legal authorities, and other interested parties.

4.5 Accessibility and inclusion

The products and services are available to the widest possible range of customers and others, fairly and without discrimination contrary to human rights obligations.

4.6 Responsiveness

Decisions and activities are made in a culturally sensitive manner and reflect the evolving needs and expectations of customers and others.

4.7 Health, safety and environment

The health and safety of customers and others and their environmental expectations are given priority at the operational level.

4.8 Confidentiality, privacy and security

Personal information is treated in a confidential manner, respecting the privacy of the customer, disclosing information to others only where the consent of the customer is provided, and that information is stored in a secure manner.

4.9 Capacity

Resources provided are sufficient to carry out all their decisions and activities in an effective, efficient, consistent, courteous and responsible manner.

4.10 Competence

Knowledge, skills and attributes and education training and experience permit decisions and activities to be carried out in a responsible and effective manner reflecting the needs and interests of customers and others.

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4.11 Continual improvement

IWA 27:2017

Decisions and activities lead to continual improvement in meeting the needs and interests of customers and others.

5 Sharing economy decision-making and action framework

5.1 General

Platform operators and providers should structure and implement their activities in accordance with a decision-making and action framework. The framework should include

- a) commitments or codes of conduct to be communicated to customers and others affected by their activities.
- b) policies and processes for fair, effective and efficient operation and continuous evaluation of same,
- c) mechanisms for ensuring compliance with commitments, policies and processes and related laws and regulations,
- d) approaches for selection and deployment of appropriate people, and adequate training, resourcing for people and other activities,
- e) approaches for obtaining feedback, and
- f) complaints handling and dispute resolution.

NOTE 1 There could be a single decision-making and action framework that applies to both the platform operator and its providers.

NOTE 2 See Annex B for guidance on handling comments and complaints.

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The framework and its implementation should operate in accordance with the guiding principles and address the following:

- a) customers;
- b) labour;
- c) government;
- d) environment;
- e) broader economic, societal, and community impacts and opportunities.

5.2 Customers

Consideration should be given to the rights, protections, interests and expectations of customers, taking into account applicable laws and regulations and international standards including those pertaining to:

- a) consumer protection;
- b) false and misleading advertising;
- c) guarantees;
- d) provision of insurance;
- e) information disclosure expectations and requirements; PREVIEW
- f) identity-related authentication; (standards.iteh.ai)
- g) pricing, taxation, charges and fees;

IWA 27:2017

- h) customer responsibilities://standards.iteh.ai/catalog/standards/sist/241d22a9-53a8-402d-90ea-
- i) personal information protections and financial information security;
- j) health, safety, and environmental expectations and requirements;
- k) non-discriminatory access and other anti-discrimination protections;
- l) reputational information provision processes; and
- m) complaints handling and dispute resolution, refunds, recalls.

NOTE With respect to these elements of the framework, a number of ISO standards can provide useful guidance, including those in the ISO 9000 quality management series pertaining to customer satisfaction codes of conduct (ISO 10001), complaints handling (ISO 10002), external dispute resolution (ISO 10003), business to consumer electronic commerce (ISO 10008), and other ISO standards such as pertaining to online consumer reviews (ISO 20488 1), environmental management (ISO 14000), and ISO 26000 (social responsibility). See Annex G for information on the scope of some of the ISO standards.

5.3 Labour

Consideration should be given to the rights, protections, interests and expectations of those providing sharing economy activities (including employer-employee relationships, independent contractors, or other), taking into account applicable laws and regulations and international norms concerning:

- a) remuneration;
- b) collective bargaining;
- c) occupational health and safety protections;
- 1) To be published.

- d) benefits and other protections;
- e) anti-discrimination protections;
- f) recruitment and termination practices.

NOTE With respect to these elements of the framework, a number of international labour standards referenced in ISO 26000 can provide useful guidance.

5.4 Government

Consideration should be given to the public policy objectives, obligations, and requirements of government, including those specifically pertaining to sharing economy activities and those of more general application:

- a) social security requirements;
- b) tax requirements;
- c) information disclosure requirements;
- d) other requirements as set out in law.

Opportunities for data exchange between platform operators, providers, and government should be considered as authorized by law or agreement.

5.5 Environment iTeh STANDARD PREVIEW

Consideration should be given to the environmental aspects) impacts, and opportunities of sharing economy activities, taking into account applicable laws and regulations and international norms.

IWA 27:2017

NOTE With respect to these elements of the framework; the standards in the ISO 14000 environmental series can provide useful guidance.

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5.6 Broader economic, societal and community impacts and opportunities

Consideration should be given to the broader economic, societal and community impacts and opportunities of sharing economy activities, which can have impacts and opportunities beyond those of customers, workers, government and the environment.

NOTE With respect to these elements of the framework ISO 26000 can provide useful guidance.

6 Feedback, review and continual improvement

As part of platform operators' or providers' continual improvement, they should conduct regular reviews of their decision-making and action framework, including consideration of:

- a) feedback from interested parties;
- b) evolving laws and standards;
- c) needs and expectations of customers and others.

NOTE The guidance to stakeholders in Annexes C, D and E can be used to gather some of the feedback from interested parties.