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Analysis of cross-border, Europe-wide trends in the field of coworking

Deliverable 1.1.2 Cross-border analysis and EU trends in coworking



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Summary

Coworking in rural regions is becoming increasingly important. For this reason, the cross-border project "Coworking Net" was launched by Slovenian and Austrian partners with the support of the INTERREG programme. The aim of this project is to explore and promote the advantages and potentials of coworking spaces in rural areas. In the course of this project, the current global and European trends in the coworking sector and their specific effects on rural regions were surveyed. A key finding is that coworking spaces can also be successful outside urban centers if they are adapted to the specific needs and conditions of the region. Industry-specific coworking spaces that are tailored to the needs of local companies and freelancers, for example, can work particularly well. Another important result is the integration of modern technologies and digital tools, which make it possible to create competitive working environments even in remote areas. Sustainability and environmental responsibility also play a central role, with coworking spaces using environmentally friendly construction methods and operating methods to improve the quality of life in the region. Building a strong community and promoting networking are crucial to support social exchange and regional development. Flexible membership models and attractive amenities such as fitness areas or workation offers contribute to the fact that coworking spaces are also attractive and successful in rural areas. The research shows that through targeted adaptation and specialization, rural coworking spaces can not only survive, but thrive by contributing to regional development and economic growth. Discover how these trends and insights can help shape the future of working in rural areas and read on for detailed insights and inspiring examples.

Overview of current trends in coworking¹

Coworking spaces have evolved from a niche offering to an essential component of the modern working world. The following trends are currently shaping the coworking sector in Europe:

1. **Use of coworking spaces by established companies:** Large companies are recognizing the advantages of coworking spaces and are increasingly using them as flexible working environments for their employees.
2. **Industry-specific coworking spaces:** An increasing number of specialized coworking spaces are emerging that are tailored to the needs of specific industries.
3. **Integration of technology and digitalization:** The use of modern technologies and digital tools is becoming increasingly important to create efficient and flexible working environments.
4. **Demand for meeting spaces:** The need for well-equipped rooms for meetings, workshops and presentations is growing steadily.
5. **Sustainability and ecological responsibility:** Sustainable construction methods and environmentally friendly operating methods are increasingly becoming a standard in the coworking industry.
6. **Community and networking:** Coworking spaces actively promote community building and networking among their members.
7. **Health and well-being:** The focus on health-promoting work environments is increasing.

1 Further information and sources:

[1] <https://www.ridestore.de/mag/coworking-spaces-europa/>

[2] <https://www.deskmag.com/de/coworking-news/coworking-space-business-trends-umfrage-2022>

[3] <https://www.buerofreunde.at/coworking-trend-oder-arbeitsform-der-zukunft/>

[4] <https://www.edgeworkspaces.com/de/warum-coworking-spaces-auch-in-zukunft-florieren-werden/>

[6] <https://coworkingguide.de/coworking/coworking-trends>

[8] <https://www.coworking.jetzt/coworking/coworking-perspektiven-in-europa/>

8. **Flexibility and adaptability:** Flexible rental models and adaptable workspaces are crucial features of modern coworking spaces.
9. **Digitization and virtual coworking spaces:** Virtual coworking spaces offer new opportunities for remote work and global collaboration.
10. **Individualization and personalization:** Customized work environments and personalized services are becoming increasingly important.

1. Use of coworking spaces by established companies²

The use of coworking spaces by established companies is a significant trend in the European coworking sector. This development is driven by the changed world of work and the new requirements of companies.

Changes in the world of work

Advancing digitalization is not only transforming companies, but also the way we work and communicate. At the heart of the modern world of work is creativity, innovative ideas and collaboration. These developments are forcing companies to make their work environments more flexible and efficient in order to motivate and retain their employees in the long term.

The classic office environment is increasingly changing towards open, collaborative spaces that promote exchange and creativity. This is particularly evident in the increasing demand for coworking spaces that meet these requirements. Companies are realizing that a dynamic work environment increases employee satisfaction and productivity, which has a positive impact on the entire organization.

Needs of companies

Established companies are looking for new ways to serve their employees flexibly and efficiently. They need workplaces that meet the diverse needs of their employees and foster collaboration. Coworking spaces offer this flexibility and allow companies to support their employees in different, task-specific environments.

² Further information and sources:

[1] <https://www.cloudflight.io/de/blog/coworking-spaces-integraler-bestandteil-jeder-digital-workplace-kultur/>

[2] <https://www.buerofreunde.at/coworking-trend-oder-arbeitsform-der-zukunft/>

[3] <https://www.stadtmarketing.eu/potentiale-von-coworking-spaces/>

[4] <https://www.fuer-gruender.de/wissen/unternehmen-gruenden/buero/coworking-space/>

[5] <https://www.coworking.jetzt/coworking/coworking-perspektiven-in-europa/>

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The requirements of the employees have also changed. The work-life balance, the ability to work remotely, and access to modern technologies are all key factors in choosing a workplace. Companies that recognize these needs and meet them by using coworking spaces can significantly increase their attractiveness as employers.

Effects on the construction, design and use of coworking spaces

The increased use of coworking spaces by established companies has far-reaching effects:

1. **Construction:** The increasing demand is leading to the increased creation of new coworking spaces. This means that both companies and start-ups will increasingly build and use such spaces. The planning and development of new locations is often done taking into account the proximity to major business centers and the availability of transport links. This trend is leading to a diversification of locations, with not only large cities, but also smaller cities and rural regions benefiting from this growth.
2. **Design:** Coworking spaces have to meet a wide range of needs. This includes retreat areas for undisturbed work, integrated technology and specialized meeting rooms. A well-thought-out design promotes the creativity and productivity of employees. Ergonomic furniture, inspiring decorations and a balanced mix of communal and individual work areas are of central importance. In addition, many coworking spaces take ecological aspects and sustainable construction methods into account in order to meet the growing environmental awareness of users.
3. **Use:** Coworking spaces are increasingly used by companies and not only by freelancers and start-ups. This development increases the importance of coworking spaces in the modern working world. Companies benefit from the flexibility that allows them to react quickly to changes in their day-to-day business without having to enter into long-term leases. This also facilitates the scalability of teams, which can be customized according to project requirements.

Future prospects

The trend towards the use of coworking spaces by established companies will continue to grow and further increase the demands on these spaces. Flexibility, innovation and collaboration will remain the key words of the coworking landscape in Europe. Companies will increasingly rely on the advantages of coworking spaces to increase

their competitiveness and promote a dynamic work culture. It is to be expected that the integration of coworking models into corporate structures will continue to increase, which will lead to an even closer integration of traditional offices and flexible forms of work.

2. Industry-specific coworking spaces³

Industry-specific coworking spaces are becoming increasingly important in Europe and represent an important trend. Various factors are driving this trend and influencing the construction, design and use of such spaces.

Drivers of the trend

A key driver is the growing demand for specialized work environments. Companies and freelancers are looking for coworking spaces that are tailored to their specific needs. This specialized environment promotes the exchange and use of synergies. For example, creative professions benefit from an inspiring environment with photo studios and workshops, while the financial sector prefers professional and discreet workplaces.

The trend towards smaller, more individual coworking spaces also plays a role. Smaller providers focus on specific target groups and create a stronger sense of community. Technological developments and innovations, such as smart office solutions, also contribute to the attractiveness of these specialised spaces.

In addition, specialization enables coworking spaces to offer specific services and networking opportunities tailored to the respective industries. This creates added value for users and promotes the formation of professional communities within the coworking space ecosystem.

Effects on construction, design and use

³ Further information and sources:

[1] <https://www.mordorintelligence.com/industry-reports/coworking-spaces-in-europe>

[2] <https://www.framen.com/blog/the-coworking-and-flex-office-trend-for-companies-and-start-ups>

[4] <https://www.nextmsc.com/news/europe-co-working-space-market>

[5] <https://www.spacebring.com/blog/tips/coworking-space-trends>

1. **Construction:** When setting up such spaces, industry-specific requirements must be taken into account, such as special rooms for creatives or increased safety standards in the healthcare sector. The structural infrastructure must meet these specific requirements in order to create optimal working conditions. This also includes the integration of special technical equipment and facilities that are tailored to the needs of the respective industry.
2. **Design:** The design must be geared to the needs of the target audience, from inspiring atmospheres for creatives to professional and discreet environments for the financial sector. Colour design, furniture selection and room layout play a central role here. Industry-specific design concepts can help create an authentic and engaging work environment that promotes user productivity and satisfaction.
3. **Use:** In addition to general offers, industry-specific spaces often offer special services and events, such as mentoring programs for start-ups or further training in the health sector. Such offers promote exchange and learning within the community. Regular networking events, workshops and seminars can support the exchange of knowledge and the professional development of members.

Examples of industry-specific coworking spaces in Europe

- **Creative professions:** In metropolises such as Berlin or Brussels, coworking spaces offer photo studios, workshops and exhibition spaces. These specially equipped rooms allow artists and designers to realize their projects in a creative environment and to exchange ideas with like-minded people.
- **Social entrepreneurs and sustainability startups:** Coworking spaces that focus on social innovation and sustainability offer a platform for exchange and collaboration. In these spaces, entrepreneurs can learn from each other and work together on projects that make a positive social or environmental contribution.
- **Health sector:** In France, there are coworking spaces that offer specific safety standards and industry-specific services. These spaces are aimed at healthcare professionals who depend on confidential and secure work environments.

Result

Industry-specific coworking spaces are a significant future trend that promotes tailor-made solutions and a diversified offer. This trend is shaping the working environments of tomorrow and contributing to a more needs-based design. By creating specialized

spaces, businesses and freelancers can increase their productivity and satisfaction. The development of such spaces continues to be driven by the demand for tailor-made working environments and the willingness of providers to offer innovative and specialised services.

3. Integration of technology and digitalization⁴

The integration of technology and digitization is a central trend in the coworking sector in Europe. Various factors are driving this trend and influencing the construction, design and use of coworking spaces.

Drivers of the trend

The growing importance of technologies and digital solutions in the world of work is an important driver. Mobile devices, cloud services and collaborative tools are essential for flexible and efficient collaboration. Coworking spaces need to provide this technological infrastructure in order to remain competitive and meet the demands of modern working methods.

The desire for end-to-end digital processes and seamless networking also plays a role. Users expect smooth transitions between different work environments and access to familiar tools and applications. This seamless integration increases user efficiency and satisfaction.

Technological innovations, such as smart office solutions, virtual reality and artificial intelligence, are creating new opportunities for specialized work environments. These

⁴ Further information and sources:

[1] <https://www.cloudflight.io/de/blog/der-coworking-technologie-stack-der-digital-workplace-nimmt-seine-neuste-entwicklungsstufe/>

[2] <https://www.ridestore.de/mag/coworking-spaces-europa/>

[3] <https://www.oeaw.ac.at/isr/wohnen-und-urbane-oekonomie/coworking-peripherie>

[5] <https://www.waceboeurope.com/de/fur-unternehmen/>

innovations make it possible to make workplaces even more flexible and efficient and to promote new forms of collaboration.

Effects on construction, design and use

1. **Construction:** A powerful technological infrastructure is crucial. This includes modern devices, reliable cloud services and a stable internet connection. Technological equipment needs to be updated regularly to keep up with the latest developments. Significant investments in network infrastructure and security technologies are needed to meet the needs of businesses and freelancers.
2. **Design:** The design of coworking spaces must be geared to the needs of digitally-savvy users. An inspiring atmosphere that also offers opportunities for retreat is essential. Technologically well-equipped conference rooms, ergonomic workplaces and attractive common areas are essential. In addition, modular furniture and flexible room concepts are important in order to meet the constantly changing needs. Coworking spaces also need to integrate digital innovations such as smart office solutions and IoT technologies to create a seamless and efficient work environment.
3. **Usage:** In addition to general offerings, technology-based spaces offer customized digital tools and services. These include virtual collaboration platforms, AI-supported assistants and special software solutions that make everyday work easier. These tools support users in their daily work and promote efficiency and productivity. Coworking spaces can also offer training and workshops on new technologies and digital working methods to continuously educate their members.

Examples of technology-based coworking spaces in Europe

- **Talent Garden:** One of Europe's largest communities for digital innovation, offers comprehensive technological equipment and a network of experts from various digital fields. These coworking spaces are specifically designed to foster collaboration and exchange among digital innovators.
- **42workspace:** A meeting place for technology and digital enthusiasts in Rotterdam. Equipped with state-of-the-art technology, this space offers an inspiring environment for start-ups and established companies in the tech sector.

Result

The integration of technology and digitalization is a forward-looking step in the design of working environments in Europe. Coworking spaces need to create powerful technological infrastructures and offer tailor-made digital tools to meet the needs of modern users. The future of work will be shaped by technological innovations and digital solutions that promote employee efficiency and creativity.

4. Demand for Meeting Spaces⁵

The growing demand for meeting spaces is a major trend in the European coworking sector, driven by the need for flexible and efficient work environments.

Drivers of the trend

Virtual meetings and networking in the digital world play a central role. Companies and freelancers are looking for coworking spaces with specialized meeting rooms to improve their communication and collaboration. These rooms are equipped with state-of-the-art technology and provide a professional environment for important business meetings.

The need for flexible working environments and special rooms for presentations, workshops or trainings is also increasing. Companies need flexibly bookable rooms that can accommodate both small team meetings and large events. Technological innovations, such as smart office solutions and virtual reality, are contributing to the emergence of new work environments.

Increasing globalization and the trend towards remote work require companies and their employees to be able to collaborate anytime, anywhere. This leads to a higher demand for well-equipped meeting spaces that can support this type of flexible work.

Effects on construction, design and use

⁵ Further information and sources:

[2] <https://www.cloudflight.io/de/blog/der-coworking-technologie-stack-der-digital-workplace-nimmt-seine-neuste-entwicklungsstufe/>

[4] <https://www.oeaw.ac.at/isr/wohnen-und-urbane-oekonomie/coworking-peripherie>

[5] <https://www.mordorintelligence.com/industry-reports/coworking-spaces-in-europe>

1. **Setup:** Meeting spaces require special equipment such as projection systems, whiteboards, video conferencing technology and ergonomic furniture. The infrastructure must be flexible enough to support different types of meetings and events. It is also important that the rooms are soundproofed to ensure interference-free communication. Modern meeting spaces must also offer the ability to support hybrid meetings, where participants are both on-site and virtual.
2. **Design:** The design must create an inspiring atmosphere and at the same time offer opportunities for retreat. This includes both open, bright rooms for creative brainstorming sessions and screened, soundproofed rooms for confidential meetings. Flexible furniture systems that can be easily adapted to different requirements are also important. In addition, the rooms should be equipped with state-of-the-art conference technology to ensure that meetings run smoothly.
3. **Use:** In addition to general offers, specialized spaces often offer special services and events. Virtual collaboration platforms, AI-powered assistants, and on-site technical support are examples of such additional services that improve the use of Meeting Spaces. In addition, coworking spaces can offer training and workshops to train their members on how to use the technology and tools available in the meeting spaces.

Examples of Meeting Spaces in Europe

- **Nuntiabo:** Supports technology startups with a welcoming and nurturing environment, providing an inspiring environment for meetings and events. The technological infrastructure and community offerings are designed to meet the needs of young tech companies and support their growth.

Result

The demand for meeting spaces is a significant trend in the coworking sector. Coworking spaces must offer specialized spaces and technological equipment to meet modern demands and promote the productivity and collaboration of their members. The future of work will increasingly be shaped by the need for flexible, technologically advanced meeting spaces that support both in-person and virtual interactions.

5. Sustainability and environmental responsibility

Sustainability and ecological responsibility have become central topics in the coworking sector. More and more coworking spaces are emphasizing eco-friendly practices and

sustainable design to reduce the environmental footprint and promote environmentally conscious work.

Drivers of the trend

The increasing focus on sustainability and environmental protection in society is driving this trend. Companies and individuals are more aware of the impact of their choices on the environment and are looking for ways to reduce their environmental footprint. This shift in awareness is also influencing workplace choices, and coworking spaces that promote sustainable practices are increasingly preferred.

Regulations and political measures to promote sustainability and climate protection also play a role. Many European countries have incentives and regulations that encourage companies to create greener work environments. These developments are driving coworking spaces to adopt sustainable construction methods and operating practices.

Effects on construction, design and use

1. **Construction:** Sustainable coworking spaces rely on ecological construction methods and materials. This includes the use of recycled and sustainable building materials, energy-efficient lighting and heating systems, and the integration of renewable energies such as solar or wind power. The choice of location also plays a role, with an increasing preference being given to locations that have good public transport connections in order to reduce CO2 emissions from commuting.
2. **Design:** The design of sustainable coworking spaces includes ecological interior design and furnishings. Natural materials, energy-efficient appliances and furniture from sustainable production are central elements. Green interiors and vertical gardens improve air quality and create a pleasant working environment. In addition, attention is paid to flexible use of space in order to minimise the need for space and to use resources efficiently.
3. **Use:** Sustainable coworking spaces promote environmentally friendly behaviour and offer incentives for environmentally conscious use. This can include recycling programs, energy-saving initiatives, and the provision of bicycles or charging stations for electric vehicles. Training courses and workshops on sustainability topics can sensitize members and motivate them to act in a more environmentally conscious way.

Examples of sustainable coworking spaces in Europe

- **Impact Hub:** A global network of coworking spaces focused on social and environmental sustainability. With numerous locations in Europe, Impact Hub offers a platform for entrepreneurs working on sustainable and social innovations.
- **Green Spaces:** In cities like London and Berlin, these coworking spaces offer eco-friendly working environments with a focus on sustainability and environmental responsibility. The premises are equipped with recycled materials and use renewable energies.
- **The Trampery:** A network of coworking spaces in the UK that focuses on sustainability and social responsibility.
- **Betahaus Berlin:** A well-known coworking space that puts sustainability at the heart of its business strategy. With a focus on eco-friendly practices, including recycling and energy conservation, and a wide range of community initiatives, Betahaus is a pioneer in the sustainable coworking movement.

Result

Sustainability and ecological responsibility are central elements of the future of coworking. By integrating eco-friendly practices and promoting sustainable lifestyles, coworking spaces can not only reduce their environmental footprint, but also set a positive example for their members and society. This trend will continue to grow in importance as more people and businesses recognize the value of sustainability.

6. Community and networking⁶

A strong community and effective networking are key aspects that distinguish coworking spaces from traditional offices and have become a major trend in the industry.

⁶ Further information and sources:

[1] <https://de.upscalespaces.com/blog/start-up-kultur>

[2] <https://fastercapital.com/de/inhalt/Die-Bedeutung-des-Aufbaus-einer-soliden-Start-up-Kultur.html>

[3] <https://thinkstartup.de/startup-kultur-treibstoff-fuer-erfolg/>

[4] <https://ambivation.com/de/startup-kultur/>

Drivers of the trend

The increasing importance of networks in the modern business world is driving this trend. Coworking spaces offer a unique opportunity to build a network of like-minded people, which is valuable for freelancers, startups and established companies alike. Members benefit from the opportunity to exchange knowledge, enter into cooperations and make new business contacts.

The social component also plays an important role. At a time when many people are working remotely, coworking spaces offer a valuable way to cultivate social interactions and be part of a community. This can reduce feelings of isolation and improve overall well-being.

Effects on construction, design and use

1. **Setup:** Coworking spaces that are geared towards community and networking need a well-thought-out infrastructure that promotes exchange and collaboration. This includes common areas, event spaces and lounges that facilitate social exchange. A central location with good accessibility is also important to attract a diverse and active community.
2. **Design:** Design must encourage interaction without compromising the ability to concentrate on work. Flexible and open space concepts that support different working styles are ideal. Comfortable seating, appealing decoration and well-equipped kitchen and dining areas help to create a welcoming and collaborative atmosphere. In addition, specially designed event rooms and presentation areas can support community activities.
3. **Use:** Coworking spaces often offer regular events and programs to strengthen the community and provide networking opportunities. This can range from informal meetings and social events to formal workshops and seminars. Such activities not only promote the exchange of ideas and knowledge, but also strengthen the bond between members and the space and each other.

Examples of community-oriented coworking spaces in Europe

- **The Office Group (TOG):** With locations in several European cities, TOG offers a variety of community and networking events. The spaces are designed to

[5] <https://www.ridestore.de/mag/coworking-spaces-europa/>

encourage interaction and collaboration, with large communal areas and flexible workspaces.

- **Mindspace:** Located in cities such as Berlin, London and Tel Aviv, Mindspace places a strong emphasis on community and networking. Regular events and a carefully curated community help build a strong network of professionals.

Result

Promoting community and networking is a central element of successful coworking spaces. By creating environments that facilitate exchange and collaboration, coworking spaces offer their members not only a workplace, but also a valuable social and professional resource. This trend will continue to grow in importance as the importance of networks and social connections in the modern workplace grows.

7. Health and well-being⁷

The focus on health and wellbeing is a growing trend in the coworking sector. Coworking spaces are increasingly emphasizing creating work environments that promote the physical and mental well-being of their members.

Drivers of the trend

An increased awareness of the importance of health and well-being in working life is driving this trend. The world of work is increasingly recognizing that employee well-being is directly linked to their productivity and satisfaction. Coworking spaces that meet these needs are therefore particularly attractive for modern employees.

⁷ Further information and sources:

[1] <https://www.sociopolitical-observatory.eu/f/cd21d512d7.pdf>

[2] <https://de.euronews.com/next/2023/04/05/in-zahlen-die-eu-steht-vor-einem-grossen-demografischen-wandel-273-millionen-weniger-mensch>

[3]

https://www.europarl.europa.eu/RegData/etudes/STUD/2022/729461/EPRS_STU%282022%29729461_DE.pdf

[5] <https://www.bpb.de/themen/soziale-lage/demografischer-wandel/196906/europas-demografische-zukunft/>

In addition, the experience of the COVID-19 pandemic has further heightened awareness of health and safety in the workplace. Hygiene standards, social distancing and health-promoting measures have come into focus and influence the design and use of coworking spaces.

Effects on construction, design and use

1. **Construction:** The construction of coworking spaces that are focused on health and well-being requires special planning and investment. This can include creating spaces with good air quality, sufficient daylight, and ergonomic features. The provision of fitness and wellness facilities, such as yoga rooms or meditation areas, is also increasingly in demand.
2. **Design:** A well-thought-out design promotes the well-being of the members. Natural materials, plants and a harmonious colour scheme can create a calming and inspiring atmosphere. Ergonomic furniture and flexible workspaces support a healthy posture and minimise physical strain. In addition, spaces for relaxation and recreation should be provided to reduce stress and promote productivity.
3. **Use:** Coworking spaces are increasingly offering programs and services that support well-being. This can include fitness classes, health workshops, and regular wellness activities. Providing healthy snacks and drinks, as well as access to mental health counseling and coaching, are other examples of how coworking spaces can promote the wellbeing of their members.

Examples of health-oriented coworking spaces in Europe

- **The Wing:** With locations in London and other major cities, The Wing offers a variety of health-promoting services and amenities, including gyms, wellness rooms and nutritional advice.
- **Uncommon:** Located in London, Uncommon places great emphasis on well-being with specially designed spaces that incorporate natural materials and plenty of natural light. The Spaces also offer fitness and wellness programs to promote the well-being of members.
- **Second Home:** With locations in London, Lisbon and Los Angeles, Second Home combines a unique design with a strong focus on health and wellbeing. The Spaces are known for their vibrant plant life, ergonomic furniture, and bright, airy spaces that support members' well-being. In addition, Second Home regularly offers wellness workshops and fitness classes.

- **Work.Life:** With multiple locations in the UK, Work.Life offers ergonomically designed workspaces, health and wellness programs, and a strong focus on work-life balance. The spaces promote a positive and healthy working environment through numerous amenities and activities.

Result

Health and well-being are central elements of modern coworking spaces. By creating environments that promote physical and mental well-being, coworking spaces can increase the productivity and satisfaction of their members. This trend will continue to grow in importance as more people and companies recognize the value of a healthy work environment.

8. Flexibility and adaptability⁸

Flexibility and adaptability are crucial features that distinguish coworking spaces from traditional offices. These qualities are particularly important in a rapidly changing world of work.

Drivers of the trend

The increasing dynamics of the world of work and the growing importance of remote work are driving this trend. Companies and individuals are looking for work environments that can be quickly adapted to changing needs. Coworking spaces offer this flexibility and allow users to change the way they work quickly and easily.

⁸ Further information and sources:

[1] <https://www.wirtschaftsdienst.eu/inhalt/jahr/2021/heft/11/beitrag/globalisierung-trifft-geoökonomie.html>

[2] https://www.ifo.de/DocDL/Studie_Geopolitische_Herausforderungen_Folgen_deutsches_Wirtschaftsmodell.pdf

[3] <https://www.iwkoeln.de/presse/in-den-medien/juergen-matthes-was-sollte-die-eu-tun-und-was-nicht.html>

[4] https://www.ecb.europa.eu/press/key/date/2023/html/ecb.sp230123_1~2d9786eedf.de.html

Uncertainty and volatility in many industries, especially since the COVID-19 pandemic, have further increased the need for flexible working solutions. Companies are looking to minimize risks and reduce their fixed costs, making coworking spaces an attractive option.

Effects on construction, design and use

1. **Construction:** The construction of flexible coworking spaces requires well thought-out planning that allows for quick adjustments. Modularity and mobility are key concepts that are integrated into the construction method. Rooms should be designed in such a way that they can be easily reconfigured and adapted to different usage requirements. This can be achieved through the use of modular walls, flexible furniture systems and a customisable technical infrastructure.
2. **Design:** The design of flexible coworking spaces includes open floor plans that support a variety of work styles. Flexible workspaces that allow for both individual and team work are just as important as private retreats for focused work. A well-thought-out design allows users to adapt their working environment as needed, whether by rearranging furniture or using variable room layouts.
3. **Usage:** Coworking spaces offer flexible rental models that allow users to book workspaces at short notice and scale their usage as needed. This includes day passes, monthly subscriptions and pay-as-you-go models. Such flexible rental options are particularly attractive to freelancers, startups and companies that need to react quickly to changes in market demand.

Examples of flexible coworking spaces in Europe

- **Spaces:** With numerous locations in Europe, Spaces offers flexible working solutions tailored to the needs of businesses and individuals. The rental models are extremely flexible and the workspaces can be easily adapted to different usage requirements.
- **Huckletree:** Huckletree offers flexible workspaces in London and Dublin that are modular in design to provide users with maximum adaptability. The spaces foster a culture of innovation and collaboration, supported by flexible rental options and customizable work environments.

Result

Flexibility and adaptability are crucial features of modern coworking spaces. By providing flexible work solutions, coworking spaces can meet the ever-changing demands of the world of work. This trend will continue to gain traction as companies and individuals increasingly look for work environments that allow for rapid adaptation and change.

9. Digitization and virtual coworking spaces⁹

Advancing digitalization has revolutionized the way we work. Virtual coworking spaces are a growing trend driven by the proliferation of remote work and digital technologies.

Drivers of the trend

The COVID-19 pandemic has accelerated the adoption of remote work and increased the demand for virtual work environments. Virtual coworking spaces offer the flexibility and freedom to work from anywhere, while also offering the benefits of a traditional coworking space, such as community, networking, and collaboration.

The development of advanced digital tools and platforms has made it easier to create and manage virtual work environments. Tools for video conferencing, project management, collaboration, and social interaction have laid the foundation for virtual coworking spaces.

Effects on construction, design and use

1. **Setup:** Virtual coworking spaces require a robust technological infrastructure to ensure seamless communication and collaboration. This includes high-

⁹ Further information and sources:

[1] <https://tci-partners.com/new-work-digitalisierung-bedeutet-flexibilisierung/>

[2] <https://www.wirtschaftsdienst.eu/inhalt/jahr/2017/heft/7/beitrag/arbeiten-40-folgen-der-digitalisierung-fuer-die-arbeitswelt.html>

[3] <https://www.wko.at/oe/news/digitalisierung-arbeitszeit-freizeit>

[4] https://www.facility-management.de/artikel/fm_Digitalisierung_veraendert_die_Arbeitswelt-3294393.html

[5]

https://www.nuernberg.de/imperia/md/buendnis_fuer_familie/dokumente/2020_ortliche_und_zentrale_flexibilitat_durch_digitalisierung.pdf

performance servers, secure networks, and easy-to-use platforms. Vendors need to invest in technology that enables frictionless and secure virtual collaboration.

2. **Design:** The design of virtual coworking spaces focuses on the user experience and creating a sense of community. Platforms need to be intuitive and easily accessible, with features that encourage interaction and collaboration. Virtual rooms for meetings, brainstorming sessions, and informal meetings are just as important as tools for project management and document sharing.
3. **Usage:** Virtual coworking spaces offer flexible membership models that meet the different needs of users. This can include daily, weekly, or monthly subscriptions. Virtual coworking space providers often organize virtual events, networking events, and workshops to strengthen the community and promote knowledge sharing.

Examples of virtual coworking spaces

- **Sococo:** Sococo offers a virtual coworking space platform that allows teams to work in a shared online environment. The platform includes virtual offices, conference rooms, and common areas that encourage collaboration and interaction.
- **Wurkr:** Wurkr is a virtual coworking platform designed specifically for remote teams. The platform offers a variety of virtual workspaces that allow users to work in a collaborative and interactive environment.
- **Pragli:** Pragli is a platform that offers virtual coworking spaces with a focus on social interaction and collaboration. The platform allows users to communicate and collaborate in real-time as if they were in the same physical space.

Result

Digitization and the spread of virtual coworking spaces are significant trends that will shape the future of work. Virtual coworking spaces offer flexibility and freedom, combined with the benefits of community and collaboration. This trend will continue to grow as more and more companies and individuals recognize and take advantage of the benefits of the digital workplace.

10. Customization and personalization

Individualization and personalization are key trends that are profoundly changing the way coworking spaces are designed and used.

Drivers of the trend

The increasing diversity of work styles and needs is driving this trend. People are looking for work environments that are tailored to their individual preferences and requirements. Coworking spaces that offer personalized services and customized workspaces can better cater to these different needs.

Technological advances allow coworking spaces to collect and analyze detailed data about their members' usage and preferences. This data can be used to create personalized experiences and increase member satisfaction.

Effects on construction, design and use

1. **Construction:** The establishment of individualized coworking spaces requires flexible and adaptable infrastructures. Spaces must be designed in such a way that they can be easily modified to meet the specific requirements of the users. This can include the integration of smart office technologies that allow users to customize their work environment.
2. **Design:** The design of individualised coworking spaces places great emphasis on flexibility and diversity. Different workspaces tailored to different work styles are just as important as personalized services. This can include dedicated rest areas, creative zones, meeting rooms, and private offices. The ability to customize the work environment to personal preferences is an essential part of the design.
3. **Use:** Coworking spaces offer personalized services and amenities tailored to the individual needs of their members. This can include customized IT solutions, personalized consulting services, and exclusive events. By using data and feedback, coworking spaces can continuously improve their offerings and adapt them to the changing needs of users.

Examples of individualized coworking spaces

- **NeueHouse:** With offices in New York, Los Angeles and London, NeueHouse offers personalized workspaces and services for creative professionals. The Spaces are designed to support individual preferences and working styles.
- **No18:** No18 offers exclusive and luxurious coworking spaces in cities such as Stockholm and Hamburg. The spaces are designed to meet the needs of discerning business professionals, with tailor-made services and high-quality amenities.
- **Second Home:** With a strong emphasis on design and individuality, Second Home offers tailor-made work environments tailored to the creative and professional needs of its members. The spaces promote a unique and inspiring working atmosphere.

Result

Individualization and personalization are key trends shaping the future of coworking spaces. By creating customized work environments and personalized services, coworking spaces can increase the satisfaction and productivity of their members. This trend will continue to gain in importance as the world of work becomes more diverse and individual.

Projected market development for coworking¹⁰

The relationship between supply and demand for coworking spaces is a decisive factor for the development and growth of this sector. The various trends and drivers are influencing both the demand for coworking spaces and the supply that responds to these needs.

Drivers of demand

1. **Flexible working:** The proliferation of flexible working models and remote work is driving the demand for coworking spaces, with businesses and individuals looking for flexible, professional work environments that can be adapted to their changing needs.
2. **Cost-effectiveness:** Coworking spaces offer a cost-effective alternative to traditional office leases. The lower fixed costs and the flexibility of the rental models are particularly attractive for start-ups and freelancers.
3. **Community and networking:** The desire for community and networking opportunities attracts many people to coworking spaces. These not only offer jobs, but also the opportunity to exchange ideas with other experts and build professional networks.
4. **Innovative working environments:** The availability of state-of-the-art technologies and innovative working environments makes coworking spaces particularly attractive. Users benefit from the equipment and services, which often go far beyond what traditional offices offer.

Drivers of the offer

¹⁰ Further information and sources:

[1] <https://www.jungewirtschaft.at/oesterreich/was-wir-bieten/coworking/verzeichnis-coworking.html>

[2] <https://unipub.uni-graz.at/obvugrhs/download/pdf/1255874?originalFilename=true>

[3] <https://www.oeaw.ac.at/news/post-pandemisches-coworking-liegt-am-land-im-trend>

[4] <https://www.thebusinessresearchcompany.com/report/coworking-space-global-market-report>

[5] <https://www.stadtmarketing.eu/potentiale-von-coworking-spaces/>

1. **Market demand:** The increasing demand for flexible workspaces is driving the supply of coworking spaces. New providers are entering the market, and existing operators are expanding their offerings to meet demand.
2. **Investment:** The increasing appeal of the coworking sector is attracting investment, leading to growth in supply. Investors recognize the potential of coworking spaces as profitable business models and support their expansion.
3. **Technological developments:** Advances in technology are enabling providers to create innovative and engaging coworking spaces that meet modern demands. This increases competitiveness and differentiation in the market.
4. **Adaptation to local markets:** Coworking space providers adapt their offerings to the specific needs and conditions of local markets. This includes both urban centers and rural areas, resulting in a wider availability of coworking spaces.

Market size and growth

The global coworking market is expected to grow from \$19.05 billion in 2023 to an impressive \$40.4 billion in 2028, a compound annual growth rate of 15.8%. This growth is driven by several factors, including the increasing number of start-ups, the expansion of digital workspaces, cross-border knowledge sharing, and rising literacy rates worldwide.

Regional development

- **Asia-Pacific:** This region was the largest market for coworking spaces in 2023, followed by North America. Cities such as Hong Kong, Singapore and Tokyo in particular are experiencing a high demand for flexible workspaces.
- **North America:** In North America, especially in the United States and Canada, coworking spaces continue to grow rapidly, supported by the high density of tech start-ups and freelancers.
- **Europe:** The number of coworking spaces is also increasing in Europe, with cities such as London, Paris and Amsterdam leading the way. Especially in Germany, there is a lively coworking scene in metropolises such as Berlin, Munich and Frankfurt.
- **South America:** In countries such as Brazil and Argentina, coworking culture is also becoming increasingly popular.

Market segmentation

The global coworking market can be segmented by business types, users, and end-uses:

- **Business types:** The main categories are open and conventional coworking spaces, corporate and professional coworking spaces, and specialized workspaces.
- **Users:** The main users include companies, freelancers, start-ups and creative professions.
- **End uses:** Coworking spaces are used in various industries, including finance, legal services, marketing, technology, real estate, and consulting.

Key trends

A significant trend in the coworking market is the increased focus on green innovations. Sustainability and eco-friendly practices are increasingly being integrated into many coworking spaces. Other trends include flexible membership models, hybrid work environments, the combination of remote and in-person work, and an increased focus on wellness and community building.

Scientific findings

A study from Austria shows that the majority of coworking users come from the creative and start-up scene. Users are overwhelmingly satisfied with the work environments offered, which encourage both flexibility and social interaction.

Regional developments in detail

- **Austria:** Cities such as Vienna, Graz and Linz are centers of the coworking scene in Austria. Initiatives to promote coworking spaces in rural areas are also gaining in importance in order to revitalise rural areas and attract skilled workers.
- **Slovenia:** In cities like Ljubljana and Maribor, the number of coworking spaces is growing, supported by the increasing number of start-ups and digital nomads.
- **Germany:** Berlin is considered the heart of German coworking culture, followed by Munich and Frankfurt. These cities offer a variety of coworking options, ranging from large international providers to small, specialized spaces.

European and global developments

Across Europe, the coworking scene is growing steadily, with major cities such as London, Paris and Amsterdam being considered hotspots. Globally, the coworking

market is driven by the rise of start-ups and the expansion of digital workspaces, as well as knowledge sharing and improved educational standards.

Result

The continuous development and growth of the global coworking market, especially in the Asia-Pacific and North America regions, shows that this sector is well on its way to playing a central role in the modern world of work. Sustainable practices, flexible working models and a strong sense of community are the key trends that will shape the future of coworking spaces.

Specific trends for coworking in rural areas

Coworking in rural areas has become increasingly important in recent years. Based on the above, there are several trends that are particularly suitable for small towns and rural regions. These trends and success factors can help coworking spaces in rural areas not only survive, but thrive.

Industry-specific coworking spaces

- **Local adaptation:** In rural areas, industry-specific coworking spaces can be established that are tailored to the specific needs of local businesses and freelancers. For example, spaces could be created that focus on farmers, craftsmen or tourism companies and offer the necessary infrastructure and services. An example would be a coworking space for farmers, which offers office space, agricultural technology advice and rooms for agricultural training.
- **Networks and collaborations:** Such spaces could enter into collaborations with local education and research institutions to promote knowledge transfer and innovation. Another approach could be to work with regional chambers of commerce to offer workshops and training that address the needs of the local economy.

Integration of technology and digitalization

- **High-speed internet:** Fast and reliable internet access is essential for the competitiveness of rural coworking spaces. Investments in modern technologies such as fiber optic internet or 5G are therefore essential. For example, a coworking space in a remote region could become attractive to digital nomads by providing ultra-fast internet.

- **Digital tools:** Cloud services, virtual collaboration tools, and other modern technologies make it possible to offset the geographical disadvantages and make remote work effective. Such tools could also include training and support for the local population to strengthen their digital skills.
- **Smart Spaces:** Integration of IoT (Internet of Things) for intelligent space management, energy efficiency and user comfort. For example, a coworking space could use sensors to automatically adjust lighting and heating to both increase comfort and save energy.

Sustainability and environmental responsibility

- **Eco-friendly construction:** Using sustainable materials and construction methods to create eco-friendly workspaces. Such initiatives are not only good for the environment, but also increase the attractiveness of the coworking space. An example could be a building built from recycled materials that offers a green roofscape.
- **Green energy:** Use of renewable energies such as solar or wind energy to make the operation of the spaces sustainable. A coworking space could install solar cells on the roof and thus not only cover its own needs, but also feed surplus energy into the grid.
- **Local agriculture:** Integration of urban gardens or cooperation with local farmers to promote a sustainable way of life. A coworking space could run a community garden where members can grow their own vegetables, or partner with organic farmers to provide fresh, local food.

Community and networking

- **Strong communities:** Building and maintaining a strong community is particularly important in rural areas. Coworking spaces can serve as central meeting places that promote social exchange and networking among users. As an example, a monthly network meeting could be organized, where members present their projects and jointly develop solutions to challenges.
- **Regional development:** By creating spaces for workshops, meetups and other events, coworking spaces can provide impetus for regional development. A successful example could be an innovation hub that regularly organises events on topics such as digitalisation, sustainability and entrepreneurship.
- **Collaborative culture:** fostering a culture of collaboration and knowledge sharing to strengthen local economies and foster innovation. Regular

brainstorming sessions or hackathons could be held here to develop creative solutions to regional problems.

Success factors for rural coworking spaces

1. **Local networking:** Working closely with local companies, institutions and the community to understand needs and requirements and offer tailor-made solutions. For example, a coworking space could work closely with the local university to promote joint research projects.
2. **Flexibility:** Flexible membership models and usage times to accommodate different work styles and times. This could include subscription models ranging from hourly usage to monthly flat rates.
3. **Attractive offers:** Providing attractive amenities such as fitness areas, cafes or relaxation areas to create a pleasant working environment. An example would be a coworking space that offers yoga classes, massages and a cafeteria with local specialties in addition to workplaces.
4. **Promoting work-life balance:** Integrating workation offerings that combine work and leisure to attract digital nomads and remote workers in particular. For example, a coworking space could offer packages that combine workspaces with leisure activities such as hiking, cycling or wellness.
5. **Marketing and visibility:** Effective use of online marketing and local networks to increase the visibility and attractiveness of the coworking space. Here, a coworking space could regularly report on events and news on social media or win over local media for reporting.

Successful examples

- **Hubud in Bali, Indonesia:** One of the most famous rural coworking spaces that combines workation and coworking. Hubud offers jobs with a tropical flair and numerous leisure activities.
- **The Hive in North Carolina, United States:** A coworking space that specializes in the needs of farmers and agribusinesses, with training and advisory services for sustainable agriculture.
- **Coworking Bansko in Bulgaria:** A popular space for digital nomads located in a small village with strong community building and outdoor activities.

These trends and success factors show that coworking in rural areas has great potential if it is adapted to the specific needs and conditions of the region. Through

specialization, technological integration, sustainability, and community building, rural coworking spaces can not only create attractive working environments, but also contribute to regional development and economic growth.