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# Deliverable No. 3.3.1.

# CATALOGUE ON MED COWORKING SPACES AND SERVICES

February 28, 2018

| PROJECT INFORMATION | |
|---|---|
| **Project name** | Social innovation research on coworking clusters |
| **Acronym** | COWORKMed |
| **Axis** | 1. "Promoting Mediterranean innovation capacities to develop smart and sustainable growth" |
| **Programme specific objective** | 1.1 To increase transnational activity of innovative clusters and networks of key sectors of the MED area |
| **Project website** | https://coworkmed.interreg-med.eu/ |
| **WP (name and number)** | 3.3. Quantitative analysis on coworking in MED area |
| **Activity (name and number)** | 3.3.1 Catalogue on MED coworking spaces and services |
| **Partner in charge** | Iris |
| **Partners involved** | Avitem, BIBA, Cowocat, IED, PACA, RAZA |
| **Status** | Draft |
| **Distribution** | Restricted |

## Summary

## Introduction

This report presents the results of the survey carried out in each territory to realise a census of coworking spaces and coworkers (Activity 3.3.1 *Catalogue on MED coworking spaces and services*). As indicated in the application form of Coworkmed project, each partner has been requested "to identify coworking sites located in the territory" in order to "identify their geographical and urban localization".

This survey has been carried out in two different stages, for the reasons that are indicated in the following paragraph. It is worth noting here that the online questionnaire used for census has collected information and data useful also for 3.5 activity (*Analysis of new business & innovation models*). The results presented in this report have therefore to be read and evaluated in parallel with the the report regarding the market study (3.5). The dataset resulting from the online questionnaires has been split in two parts, between IRIS and BIBA, in order to produce two different reports (as required by the application form): the present report is oriented to analyse the main characteristics of coworking spaces (year of foundation, legal status, being part of a platform or not, location) and users' profiles (sex, age, education, professions), while 3.5 report is focused on the economic dimension of coworking spaces activities (interactions with other institutions, research centres and SMEs, sectors and specialisations etc.). Anyway, the implications emerging from this report and from 3.5 report converge to shape the recommendations at the basis of 3.8 activity (final guidelines).

## 1. Methodology, stages of the survey and respondents

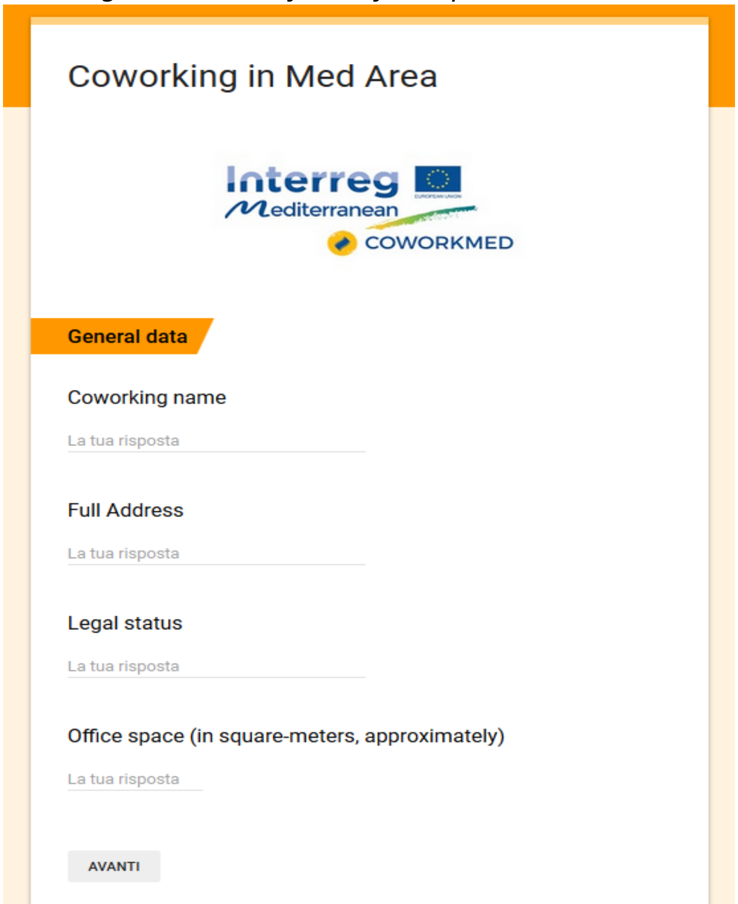
Following the discussion about the definition of the concept of coworking, a research tool based on an questionnaire articulated in several sections has been set up and shared on April 28th 2017. As explained in the deliverable about 3.3.2 activity (*Terms of Reference*), all partners have acknowledged the impossibility to select coworking spaces by matching in advance the criteria fixed in the shared definition, as imagined in the first steps of the project. This was the reason why the list of recipients of the questionnaire has been composed following two other criteria: a) the existence of a legal definition of coworking activities (and this condition is so far present only in Tuscany, as can be clearly seen by 3.1.1.

legal framework report), and b) the self-definition of activities as 'coworking' by entrepreneurs and managers in the other territories (Catalunya, PACA, Greece and Croatia).

The questionnaire has been arranged as a form to be filled online by each recipient through the following weblink (a Google Form page): [https://docs.google.com/forms/d/e/1FAIpQLSegYYmvkTjtaZJx2itMvffPvO7EuLYFpJFhigu8DkHztmiN4A/viewform](https://docs.google.com/forms/d/e/1FAIpQLSegYYmvkTjtaZJx2itMvffPvO7EuLYFpJFhigu8DkHztmiN4A/viewform).

In figure 1 the snapshot of the first page of the online form as it appeared to the recipients.

*Figure 1. Online form of the questionnaire*




The collection of email addresses of the coworking spaces to be reached with the weblink was completed on May 12. Catalan partner BIBA decided not to take part to this stage of the census, supporting the idea of an integration of the online questionnaire with the research tools regarding 3.5, 3.6 and 3.7 studies. Anyway, the other partners agreed to start: the sending of the email containing the above cited weblink to the full list of recipients (129, without the Catalan coworking spaces) was done on May 23 by Iris: both the sending and the possible interaction with coworking spaces asking information about the online questionnaire were centralised.

The survey ended on June 23rd (after two reminders sent by IRIS to the recipients, on June 14 and 22), in order to have an updated picture of data by the Barcelona workshop (June 28-29). In table 1 it is possible to observe the low response rate (11.6%) of this first stage of the data collection.

*Table 1. Data collection, first stage (23 May-23June 2017)*

| *Territory* | *Responses* | *Sample* | *Rate (%)* |
|---|---|---|---|
| Croatia | 5 | 20 | 25,0 |
| Greece | 2 | 77 | 3,9 |
| PACA | 3 | 15 | 13,3 |
| Tuscany | 5 | 17 | 29,4 |
| Total | 15 | 129 | 11,6 |

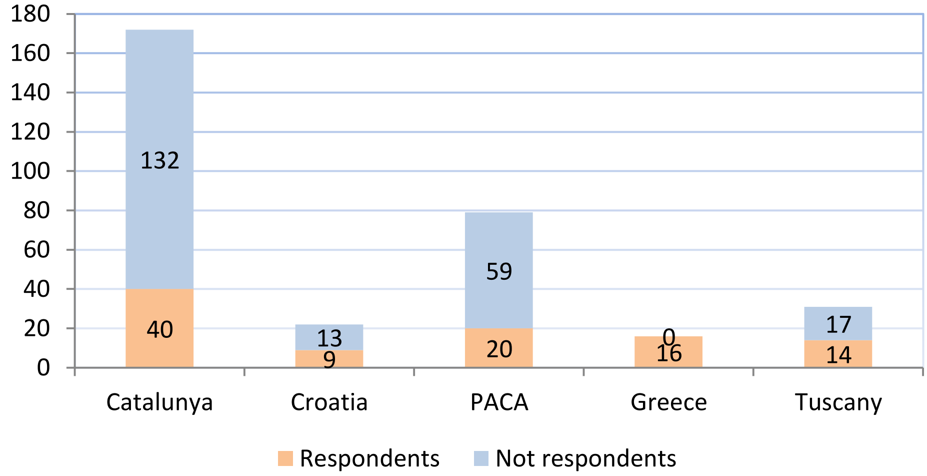
Due to the unsatisfactory outcome, in Barcelona Coworkmed partners took two major decisions: a) to put in place a second stage of the census by decentralising the data collection activity, in order to facilitate the interactions with coworking spaces at local level and to make each partner responsible for its own territory (but at the same time maintaining IRIS responible for the overall coordination the activity); b) to better integrate the research tools regarding census (3.3.1) and other studies (3.5, 3.6 and 3.7), in order to avoid the overload of coworking managers with different requests and questionnaires. After the adoption of a unified tool of research (see annex 1), each partner has been left free to decide how to submit the research tools to their own recipients (the list of national/regional coworking spaces).

The second stage of the census has been carried out from September to November 2017. The resulting dataset was finalised at the end of December (in view of the Larissa workshop in January 2018). The decentralised management of the census proved to be effective, as shown in table 2 and figure 2: the response rate, increased to more than 30% (99 coworking spaces out of a total of 320, comprising the Catalan spaces not present in the first stage and the updated list af addressees) has to be considered as a good sample. This evaluation depends not only on the nature of the tool used (an online tool), but on the reasoning highlighted as well in the deliverable 3.3.2: while we were looking for contacts with coworking spaces in some territories (like Tuscany), some of those spaces resulted not to be active or receiving only a few coworkers. It has to be taken into consideration that in the third column of table 2 all coworking spaces contacted are enumerated, independently from further considerations regarding their operational state.

*Table 2. respondents by country/region and rate of response (%)*

| *Country/Region* | *Respondents (a.v.)* | *Census* | *Resp. on census (%)* |
| --- | --- | --- | --- |
| Catalunya | 40 | 172 | 23,3 |
| Croatia | 9 | 22 | 40,9 |
| PACA | 20 | 79 | 25,3 |
| Greece | 16 | 16 | 100,0 |
| Tuscany | 14 | 31 | 45,2 |
| Total | 99 | 320 | 30,9 |

*Figure 2. Respondents and not respondents by country/region*




The number of coworking spaces resulting from the census (320) in Coworkmed territories can be compared with the most recent results of Deskmag Global Coworking Survey (Deskmag 2017). According to Deskmag, the overall number of coworking spaces in the world is around 13.800 (+2.500 with respect to the previous year), while members have peaked to almost 1,2 millions (see figures 3 and 4). These data show that coworking spaces in the Coworkmed area represent around 2,3% out of total estimated coworking spaces in the world: not a negligible percentage, if we consider – with specific reference to Europe – that a relevant majority of worldwide coworking spaces are located in the US. Even if we are not able to evaluate the incidence of the European figures out of the total, it appears reasonable to assert that within the European framework the Coworkmed area represents a relevant geographical context for this kind activities.

*Figure 3. Number of coworking spaces worldwide. 2011-2017*

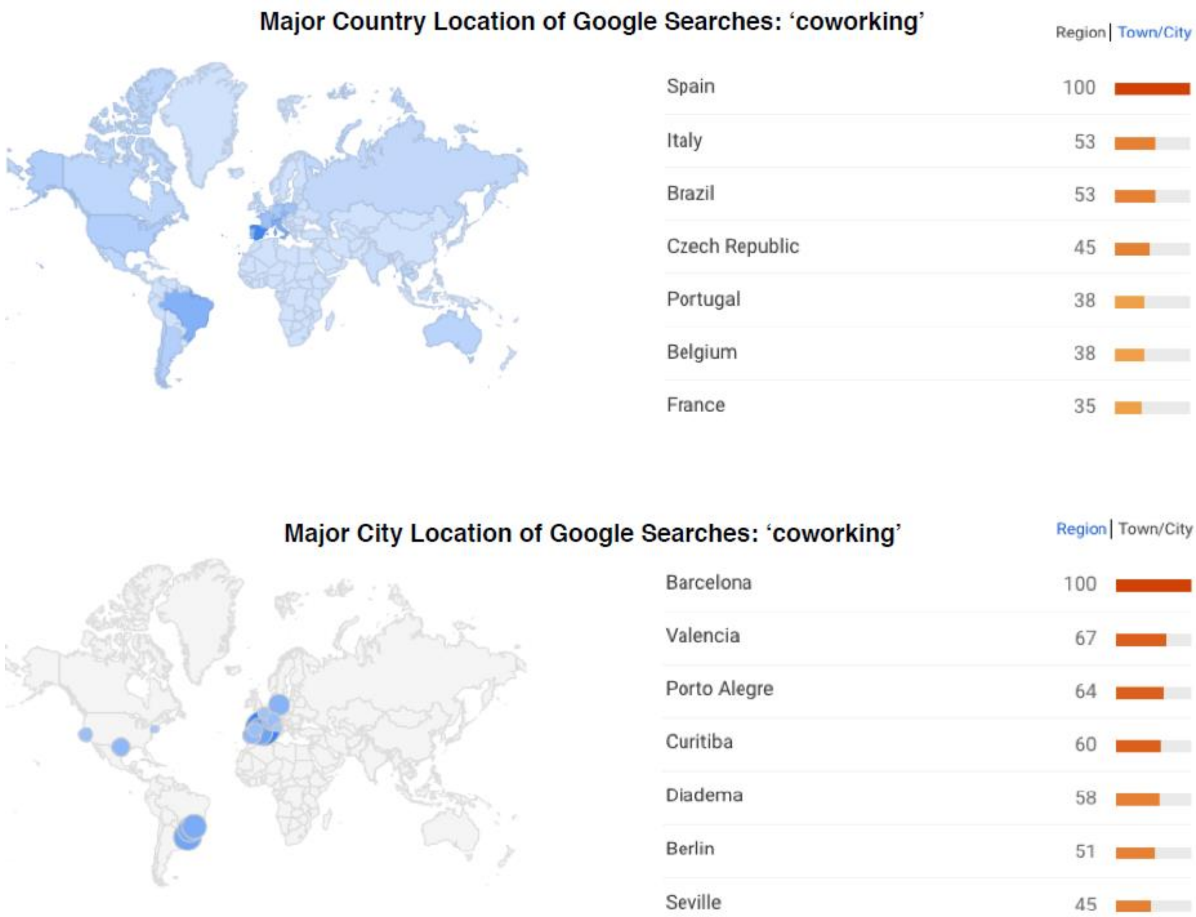

*Figure 4. Number of coworking spaces worldwide. 2011-2017*


Source: Deskmag (2017)

The continuous increase of interest for coworking activities is also demonstrated by aggregated data on Google searches. According to Waters-Lynch and al (2017: 16-17) not only the growth of searches based on the term increased exponentially in the last years; if we consider countries and cities, we can find Spain, Italy and Barcelona as topping the countries and cities search ranks until 2015, as shown in the figure 5 below[1].

[1] It is worthy to note that authors affirm that the causes of the top ranking for Spain and Barcelona "are not clear, although the Spanish economic crisis and high rates of youth unemployment are cited as factors present in the minds of Spanish coworkers" (Waters-Lynch et al 2016: 18).

*Figure 5. Major city and country location of Google Searches on ‘coworking’*




Source: Waters-Lynch et al 2016: 19.

## 2. Basics: year of foundation, legal status and platforms

Before analysing data regarding the year of foundation of coworking spaces in Cowork-med territories, it is worthy to provide a short summary of the history of coworking activities.

The commonly shared origin stories of coworking practices are three. The first deals with the opening in San Francisco, in 2005, of a new space by a computer programer and open-source supporter (Brad Neuberg). This space, named *Spiral Muse*, was located in the Mission District; Neuberg published an invitation on his blog later considered the “founding moment for the coworking movement” (Waters-Lynch et al 2016: 5). The second deals with a small group of social entrepreneurs, who in the same 2005 opened a space called The Hub (now Impact Hub) on the top floor of an old warehouse in Islington, London. This space was founded on the wake of social movements contrasting unregulated globalisation and was actually the cornerstone of coworking spaces operating in the field of social entreprenurial innovation (nowadays, Impact Hub represents a network of coworking spaces operating worldwide and therefore in MED areas as well). The third story is about two room-mates and self-employed software programers, Amit Gupta and Luke Crawford, who in 2006, in New York City, decided to invite friends to work informally at home with them: these gatherings were named jellies because Gupta and Crawford conceived “the idea while eating jellybeans” (Grossman 2007). As Waters-Lynch et al assert (2016: 7), “although these three examples began as contemporaneous but independently named social practices, we can conceptualise them under a broad frame of ‘coworking’”, since all the three share the search for a ‘third way’ of work relations involving both “physical proximity and social cooperation”.

Coworking Wiki timeline is very useful to reconstruct the evolution of this phenomenon[2]. The first attested use of the word ‘coworking’ dates back to 1999, when game designer and theorist Brian DeKoven launched the word "coworking" to describe the “working together as equals” pattern he observed during game design amongst people that shared “a deep appreciation of the joy of participating in a creative, playful community” (DeKoven (2013). DeKoven never applied the term to characterise shared workspace enterprises. After Neuberg’s *Spiral Muse*, *The Hub* and *Jelly*, the movement began to assume the characteristics we are more familiar about: in 2006, in San Francisco, *Citizen Space* opened, an important step in coworking history due to the leading role played by that space; in 2007 the term ‘coworking’ appears for the first time on Wikipedia and becomes very popular in Spain on Google Search (at the end of the same year in Barcelona, in the neighborhood of Gracia, the first Spanish coworking space opened); in 2008 coworking activities strats to spread in Europe, while two years later the first coworking barcamp was held in Italy (April 2010). At the end of 2010 the first Coworking Europe conference took place in Brussels, attended by more than 150 people from 22 countries and soon after followed by the first European JellyWeek (January 2011) and the first conference on coworking in Spain (May 2011).

Our census confirm that coworking spaces in Coworkmed area began their activities before 2012 mainly in Catalunya (10 out of 40 of the Catalan spaces). As it can be seen in table 3 and figure 6, in terms of year of foundation the outcome is quite balanced: there is a

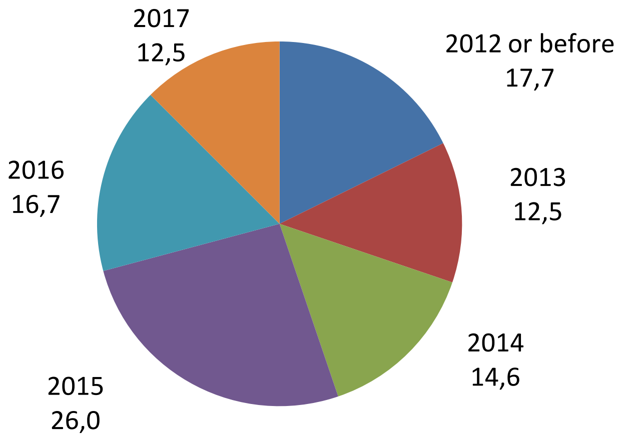
[2] http://wiki.coworking.org/w/page/68852527/History%20of%20Coworking%20-%20a%20timeline.

peak in 2015, but overall variability is low. 2017 should be interpreted more cautiously, since it is the year of the survey and some new space could have been more difficult to reach.

*Table 3. Year of foundation by country/region*

| *Year* | *Catalunya* | *Croatia* | *PACA* | *Greece* | *Tuscany* | *Total* | *%* |
|---|---|---|---|---|---|---|---|
| 2012 or before | 10 | - | 2 | 3 | 2 | 17 | 17,7 |
| 2013 | 7 | 1 | - | 4 | - | 12 | 12,5 |
| 2014 | 4 | 1 | 3 | 3 | 3 | 14 | 14,6 |
| 2015 | 8 | 2 | 9 | 1 | 5 | 25 | 26,0 |
| 2016 | 8 | 3 | 2 | - | 3 | 16 | 16,7 |
| 2017 | 3 | 2 | 4 | 2 | 1 | 12 | 12,5 |
| Total | 40 | 9 | 20 | 13 | 14 | 96 | 100,0 |

*Figure 6. Year of foundation by country/region (% on total respondents)*

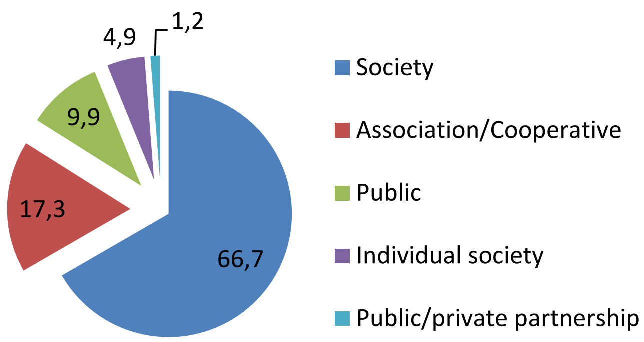



As shown in table 4 and figure 7, coworking spaces responding to the survey are mainly led by societies (54 out of 81, 66,7%). When specified, these societies are mainly limited companies; if public institutions are involved (9 spaces), as direct owners or partners, they are mostly local administrations or municipalities.

*Table 4. Legal status of coworking spaces*

| *Legal status* | *a.v.* | *%* |
|---|---|---|
| Society | 54 | 66,7 |
| Association/Cooperative | 14 | 17,3 |
| Public (local institutions) | 8 | 9,9 |
| Individual society | 4 | 4,9 |
| Public/private partnership | 1 | 1,2 |
| Total | 81 | 100,0 |

*Figure 7. Legal status of coworking spaces (% on total respondents)*




Societies are the most frequent typology in each territory, and represent the great majority both in Greece and Tuscany (Table 5). We can notice a relevant number of spaces led in the form of associations or cooperatives in PACA (7 out of 19). In this territory, if we sum up these 7 spaces to the 2 having a public management, these two typologies together count for half of respondents.

*Table 5. Legal status of coworking spaces by country/region*

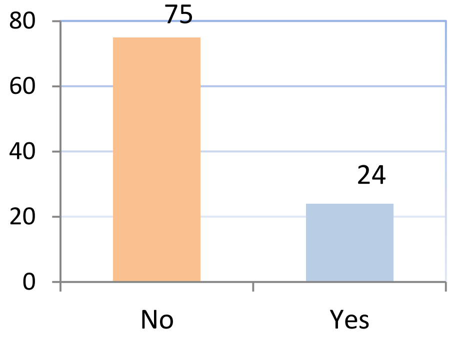
| *Country/Region* | *Society* | *Assoc./ Coop.* | *Public* | *Other/Not identifiable* | *Individual society* | *Public/priv. partnership* | *Total* |
|---|---|---|---|---|---|---|---|
| Catalunya | 16 | 2 | 5 | 3 | 4 | - | 30 |
| Croatia | 4 | 2 | 1 | - | - | 1 | 8 |
| PACA | 9 | 7 | 2 | 1 | - | - | 19 |
| Greece | 12 | 2 | - | 1 | - | - | 15 |
| Tuscany | 13 | 1 | - | - | - | - | 14 |
| Total | 54 | 14 | 8 | 5 | 4 | 1 | 86 |

The online questionnaire contained also a question about the possible belonging of each coworking space to a platform, i.e. the possible existence of formal ties linking a single space to a major network with other spaces located elsewhere. The intention here was to verify the frequency of activities set up with connections extending beyond the localised social or economic initiatives taken by the founders. The overall outcome (Table 6, figure 8) indicates that one out of four are coworking spaces connected to a platform. It is also possible to notice some relevant differences: while in PACA 17 out of 20 are spaces detached from any link to a broader platform, this typology has a relevant incidence in Tuscany (5 spaces out of 14 are linked to a platform). The average is not much different than the last data resulting on this topic from a Deskmag worldwide survey: according to data dating back to 2012, 79% of coworking spaces worldwide do not belong to any platform/network of coworking spaces (Deskmag 2012).

*Table 6. Is the coworking space part of a larger platform?*

| *Response* | *Catalunya* | *Croatia* | *PACA* | *Greece* | *Tuscany* | *Total* |
|---|---|---|---|---|---|---|
| No | 30 | 6 | 17 | 13 | 9 | 75 |
| Yes | 10 | 3 | 3 | 3 | 5 | 24 |
| Total | 40 | 9 | 20 | 16 | 14 | 99 |

*Figure 8. Is the coworking space part of a larger platform?*

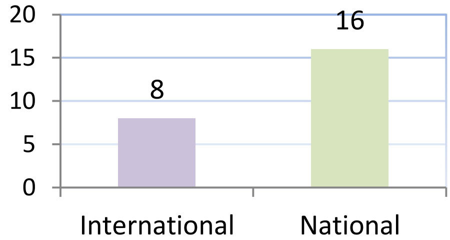



Among the respondents (24) belonging to a platform, two out of three are connected to a national network (table 7, figure 9). International networks prevail in Greece (where all three spaces connected to a network are connected to an international platform) and Croatia (although in both countries the small number of cases must be considered); the national ones are the only presence in PACA and the great majority in Catalunya and Tuscany (80%).

*Table 7. Type of platform by country/region*

| *Type of platform* | *Catalunya* | *Croatia* | *PACA* | *Greece* | *Tuscany* | *Total* |
|---|---|---|---|---|---|---|
| International | 2 | 2 | - | 3 | 1 | 8 |
| National | 8 | 1 | 3 | - | 4 | 16 |
| Total | 10 | 3 | 3 | 3 | 5 | 24 |

*Figure 9. Type of platform by country/region*



## 4. Location

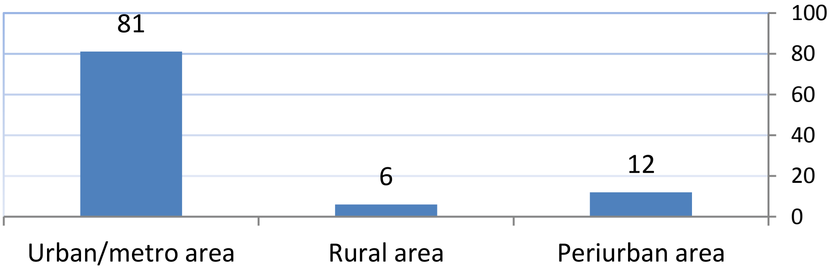
Location of the spaces is a fundamental aspect. This is well known: yearly Deskmag surveys and many other studies repeatedly show how basic the geographical position of coworking spaces is for their success. It is meaningful that in the final list of recommendations presented at the end of a recent European project on coworking, the first point was titled “Choose the right location” (Lukjanska 2016). This recommendation was the result of an online survey directed to identify motivations and obstacles to consider when opening a coworking space: as the coworking founders were asked to give three recommendations for new potential coworking founders, the majority of them considered the location as the most important aspect.

In Coworkmed census 81% of spaces are located in a urban area (table 8, figure 10). The percentages of urban coworking spaces vary: 81,2% in Greece, 90% in Catalunya[3], 100% (all nine respondents) in Croatia, 70% in PACA (where five spaces are located in a rural area) and 65,2% in Tuscany (where non-urban spaces are located almost exclusively in periurban areas). This results do not look as a surprise, since coworking spaces tend usually to cluster around “inner urban, creative suburbs” (Waters-Lynch et al 2016: 24). Nevertheless, non-urban spaces are not at all negligible, above in PACA and Tuscany, where data seem to show the existence of a series of experiences tied to more peripheral territories.

*Table 8. Location of coworking spaces by country/region*

| *Area* | *Catalunya* | *Croatia* | *PACA* | *Greece* | *Tuscany* | *Total* |
|---|---|---|---|---|---|---|
| Periurban area | - | - | 5 | 2 | 5 | 12 |
| Rural area | 4 | - | 1 | 1 | - | 6 |
| Urban/metrop. area | 36 | 9 | 14 | 13 | 9 | 81 |
| Total | 40 | 9 | 20 | 16 | 14 | 99 |

*Figure 10. Location of coworking spaces*




[3] Filling one of the sections of the online questionnaire reserved to open questions, a Catalan coworking manager has written that “the majority of users sees localisation as a strategic factor”.

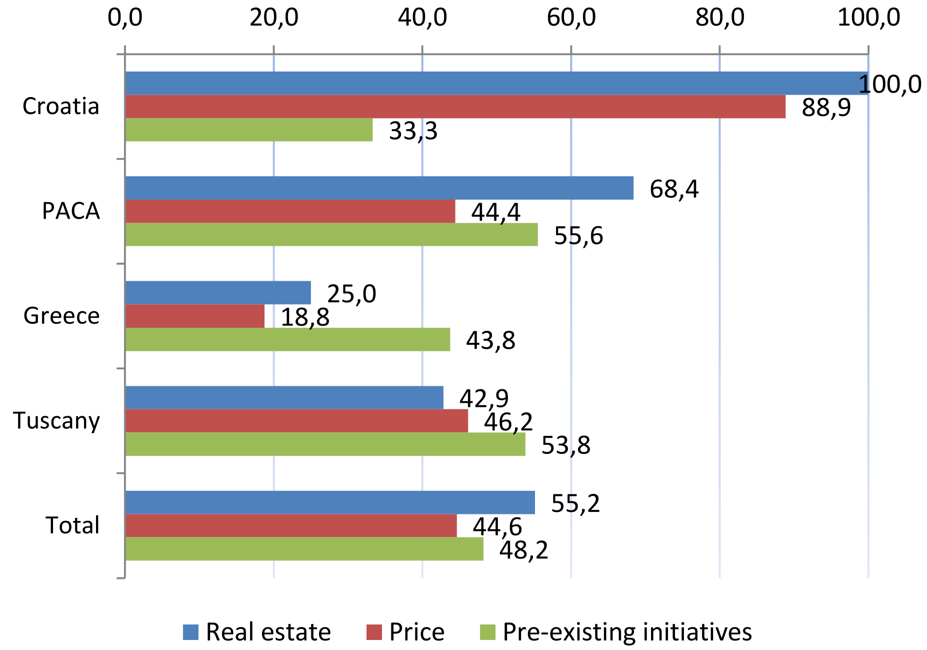
Through the census we tried to investigate the reasons for the choice of location. The online questionnaire has proposed three response alternatives: real estate conditions (property or availability in any other form of a specific building); the accessible price; any pre-existing initiatives (when coworking spaces arise from a previous mobilisation of economic or social networks in a specific area, neighbourhood or space). Respondents were asked to rate the relevance of each of these alternatives[4]. Table 9 and figure 11 show the variability of reasons among the different territories: while in Croatia the localisation is strongly influenced by the structural conditions (real estate conditions and price), in Greece and Tuscany pre-existing initiative appear as a most relevant factor. PACA has a prevalence of the real-estate factor, but with high percentages of the other two answers too.

*Table 9. Main reasons of the localisation*

| *Real estate conditions* | *Relev./Very rel.(a)* | *Not rel /Quite rel (b)* | *Resp. (c)* | *% a/c* |
|---|---|---|---|---|
| Croatia | 9 | - | 9 | 100,0 |
| PACA | 13 | 6 | 19 | 68,4 |
| Greece | 4 | 12 | 16 | 25,0 |
| Tuscany | 6 | 8 | 14 | 42,9 |
| *Total* | *32* | *26* | *58* | *55,2* |
| *Price affordability* | *Relev./Very rel.(a)* | *Not rel /Quite rel (b)* | *Resp. (c)* | *% a/c* |
| Croatia | 8 | 1 | 9 | 88,9 |
| PACA | 8 | 10 | 18 | 44,4 |
| Greece | 3 | 13 | 16 | 18,8 |
| Tuscany | 6 | 7 | 13 | 46,2 |
| *Total* | *25* | *31* | *56* | *44,6* |
| *Pre-existing initiatives* | *Relev./Very rel.(a)* | *Not rel /Quite rel (b)* | *Resp. (c)* | *% a/c* |
| Croatia | 3 | 6 | 9 | 33,3 |
| PACA | 10 | 8 | 18 | 55,6 |
| Greece | 7 | 9 | 16 | 43,8 |
| Tuscany | 7 | 6 | 13 | 53,8 |
| *Total* | *27* | *29* | *56* | *48,2* |

[4] Due to different methods used for collecting data, information regarding Catalan coworking spaces about this variable are not available.

*Figure 11. Main reasons of the localisation (% of relevant/very relevant responses)*

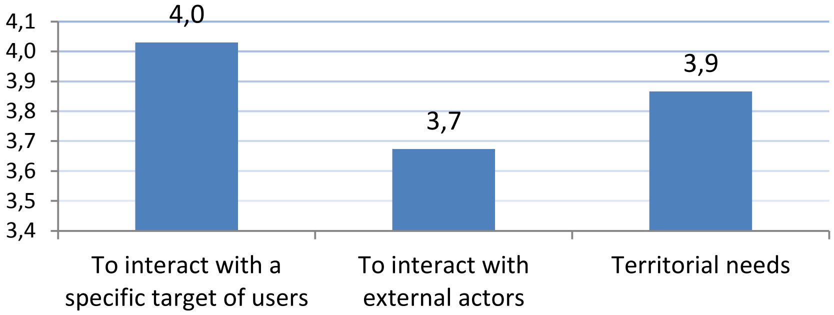



Another section of the survey was dedicated to deepening the specificities of coworking spaces due to the geographical localisation. The topic was investigated by asking coworking managers to evaluate in a scale from 1 (*Strongly disagree*) to 5 (*Strongly agree*) the three following response alternatives: a) "to interact with a specific target of users"; b) "to interact with external actors"; c) "territorial needs" (the question was the following: *Do you agree or disagree with the following statements regarding the coworking space specificities due to your peculiar geographic localisation?*). Table 10 and figure 12 show a balanced overall result: the highest score concerns the interaction with a specific target of users, thus suggesting the relevance of specialisation or sectoral clustering factors (mean 4,0, with the peak in Tuscany, 4,2). Immediately afterwards follow the 'territorial needs' (3,9, with a relevant 4,4 in PACA), some decimal more than the interaction with 'external actors' (3,7, with no relevant differences between territories).

*Table 10. Coworking spaces specificities related to the geographical localisation by country/region* (from 1= strongly disagree to 5= strongly agree)

| *Reason* | *Catalunya* | *Croatia* | *PACA* | *Greece* | *Tuscany* | *Total* |
|---|---|---|---|---|---|---|
| To interact with a specific target of users | 4,2 | 3,9 | 4,0 | 3,5 | 4,2 | 4,0 |
| To interact with external actors | 3,7 | 3,6 | 3,8 | 3,6 | 3,6 | 3,7 |
| Total | 3,8 | 3,6 | 4,4 | 3,5 | 3,9 | 3,9 |

Figure 12. *Specificities due to the geographical localisation (overall average)*




In case of score '4' or '5' for the 'Territorial needs' answer, the questionnaire has asked to describe the kind of territorial needs respondents were referring to. Among the 57 responses containing a score of '4' (20) or '5' (37), 31 coworking managers added a descriptive response. These answers have been coded and grouped as in table 11 (the third column contains the most expressive examples of each category). As you can see, the existence of ecosystem connections, the uniqueness of the space in a specific location, and above all the accessibility thanks to the geographical position (proximity to the transport networks or hypercentrality) are the most frequent answers (the total number is higher than 31 because some answers can be coded under multiple categories).

*Table 11. Typology of territorial needs*

| *Category* | *Number of resp.* | *Most meaningful responses* |
|---|---|---|
| Accessibility | 13 | - *Central location - a lot of tourists and visitors stay or pass through the centre of* [name of the town]<br>- *Hyper central in the city, very accessible by foot, transport* |
| Ecosystem connections | 9 | - *In this area people create companies more than in other areas but those companies don't last because of the lack of services like those offered by* [name of the coworking space]<br>- *We are in a neighborhhod looking for technological activi-ties, and we are a coworking providing such services*<br>- *We are connected to the local textile industry* |
| Uniqueness of the space | 8 | - *We are the only coworking space in* [name of the town]<br>- *We are close to the University and to many companies, the area is improving*<br>- *Without our space, many skilled professionalswould be obliged to reach urban areas* [rural coworking space] |
| Transport networks | 8 | - *Well connected to the transport network, it's close to the city center*<br>- *Connected with the airport in 15 minutes* |
| Place attraction | 5 | - *Very beatiful place - ex industry*<br>- *Quite area, green environment* |
| Market study | 1 | Not specified |
| Quality of the web conn. | 1 | *There is optical fiber* |

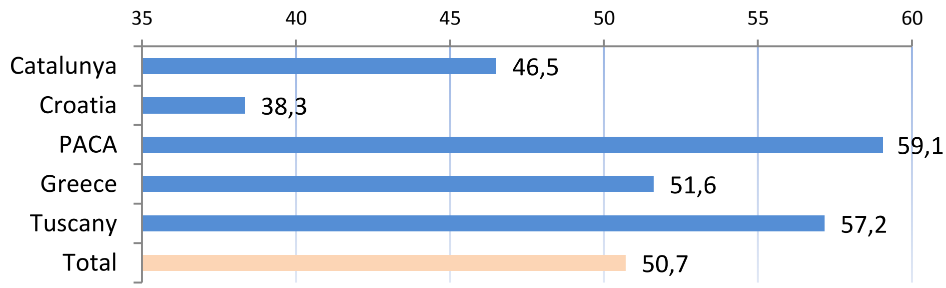
## 5. Users' profiles

The following pages reconstruct coworkers' profiles according to data collected in a specific section of the online questionnaire. Coworking managers have been required to respond to questions dealing with four different characteristics of coworkers: sex, age, education, and profession. Respondents have been asked to indicate an estimated percentage for three variables (sex, age and education) and a ranking of the three most frequent professions for the fourth. In the following tables and figures the percentages and responses are therefore the result of estimates made by coworking managers. The data are presented in subparagraphs, following the sequence of questions in the online questionnaire.

### *5.1. Sex*

The average percentage resulting from coworking managers' responses show a slight male majority (50,7%, figure 13), but with relevant territorial differences. In Croatia the female component represents a large majority of users/members (almost 62%), while in PACA and Tuscany the incidence of the male component is respectively 6 and 4 percentage points higher than the overall average.

*Figure 13. Mail percentage per country/region  (average of percentages)*




If we consider the total number of residents in Eu and in countries/regions involved in Coworkmed project at the beginning of 2016 (table 12), we can notice a slight majority of females (around 51/52% in all territories).  Since in our census we are comparing percentages and not absolute values, census data do not necessarily deviate from data regarding the overall population: indeed, knowing that Catalan coworking spaces and their members are relatively more numerous than spaces and members in the other areas, the higher percentage of women in Catalunya is compatible with a majority in absolute values of the female component in the Coworkmed area considered as a whole.

*Table 12. Population by sex in EU and Coworkmed territories. January 1, 2016*

| *Area* | *Total* | *Males* | *Females* | *Female %* |
|---|---|---|---|---|
| European Union (28 countries) | 510.278.701 | 249.367.173 | 260.911.528 | 51,1 |
| Greece | 10.783.748 | 5.224.210 | 5.559.538 | 51,6 |
| Cataluña | 7.408.290 | 3.627.940 | 3.780.350 | 51,0 |
| Provence-Alpes-Côte d'Azur | 5.024.192 | 2.407.969 | 2.616.223 | 52,1 |
| Croatia | 4.190.669 | 2.022.797 | 2.167.872 | 51,7 |
| Toscana | 3.744.398 | 1.801.468 | 1.942.930 | 51,9 |

Table 13 shows that according to coworking managers the distribution by sex is quite balanced in almost half of the spaces (44 out of 95 havent' any sex representing more than 60% of the total). A meaningful majority (between 61% and 80%) is reached in 37 spaces (in 20 it is about a male majority, in 17 about a female majority), while in only 14 spaces (equally distributed in terms of sex prevalence) we notice a strong male or female majority (higher than 81%).

*Table 13. Users by sex and country/region (percentage interval)*

| *Percentage interval* | *Catalunya* | *Croatia* | *PACA* | *Greece* | *Tuscany* | *Total* |
|---|---|---|---|---|---|---|
| 0-20: strong female majority | 2 | 2 | - | 1 | 2 | 7 |
| 21-40: female majority | 7 | 2 | 2 | 5 | 1 | 17 |
| 41-60: balance | 20 | 5 | 11 | 3 | 5 | 44 |
| 61-80: male majority | 8 | - | 3 | 6 | 3 | 20 |
| 81-100: strong male majority | 2 | - | 2 | 1 | 2 | 7 |
| Total | 39 | 9 | 18 | 16 | 13 | 95 |
| *Male average* | *46,4* | *38,3* | *59,1* | *51,6* | *57,2* | *50,7* |

As for users' profiles, the most important term of comparison is the recent Global Coworking Survey (Deskmag 2017b)[5]. The survey shows "the continuously rising share of female members", especially between frelancers and employees who work in coworking spaces. However, the same survey highlights that "once women marry, the share of female members drops, especially in the age group between 30 and 50 years". The interpretation is unambiguous: "the main reason for this appears to be child care", in particular, "while many women still seem to be able to combine their private and professional lives after having their

[5] The 2017 Global Coworking Survey was realised online from November 9 to December 23, 2016. 1876 people took part. The list of partners and supportes of the survey is available here: http://www.deskmag.com/en/background-of-the-2017-global-coworking-survey.

first child, the number of female members in coworking spaces drops rapidly once they become pregnant again" (Foertsch 2017). Even if our census is not able to add nothing to this indication, it is not hazardous to imagine that in the MED area, due to its historical fractures in the job market, this issue is probably even more relevant.

### 5.2. Age

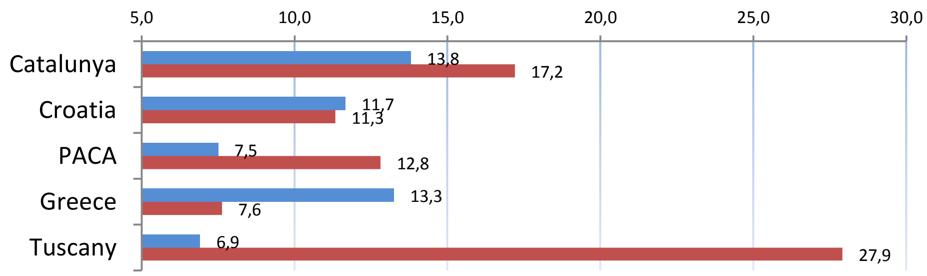
Users' age is shown in table 14: also data about this variable derive from estimated percentages provided by coworking managers. In all territories but Catalunya, the group aged between 25 and 34 is the most frequent: the highest percentage reached by this group is 47,9% in Greece. The higher average age in Catalunya is probably related to the seniority of coworking spaces in this area, higher than in the other territories (see infra, table 3).

*Table 14. Users by age group and country/region (percentage)*

| *Age group* | *Catalunya* | *Croatia* | *PACA* | *Greece* | *Tuscany* |
|---|---|---|---|---|---|
| Up to 24 | 13,8 | 11,7 | 7,5 | 13,3 | 6,9 |
| 25-34 | 32,0 | 49,4 | 45,0 | 47,9 | 33,9 |
| 35-44 | 37,0 | 27,6 | 34,7 | 31,2 | 31,3 |
| 44 and more | 17,2 | 11,3 | 12,8 | 7,6 | 27,9 |
| Total | 100,0 | 100,0 | 100,0 | 100,0 | 100,0 |

Figure 14 compare the weight of the two opposite poles, the youngest group (up to 24) and the oldest group (44 and more): in Catalunya, PACA and (sharply) in Tuscany the second group outnumber the first, while in Greece and Croatia the youngest prevails. Data from Tuscany are particularly relevant, given that the Tuscan legal framework on coworking is strictly related to youth policies: according to these estimates, between Tuscan coworkers one out of three risk to be outside the age threshold (40 years) required to be eligible for the regional financial incentives.

*Figure 14. Percentage of age groups up to 24 and 44 and more by country/region*



There is however no doubt that coworkers represent a component characterised by a quite low age average in the labour markets of all Coworkmed territories. In table 15 it is possible to observe the distribution by age group of population aged between 20 and 64 in Coworkmed territories:  if we consider the overall population, the percentage of population aged between 44 and 64 is much higher than the incidence of this age group between coworkers (as estimated in table 15): according to Eurostat data the age group between 44 and 64 never represents less than 44% of the whole group 20-64, while in table 15 even Tuscan figures (almost 28% of coworkers aged 44 or more) are very far from the incidence of this age group on the overall population aged between 20 and 64 years (almost 50% in 2016).

*Table 15. Eu and Coworkmed territories population per age group. January 1, 2016 (absolute values and percentages)*

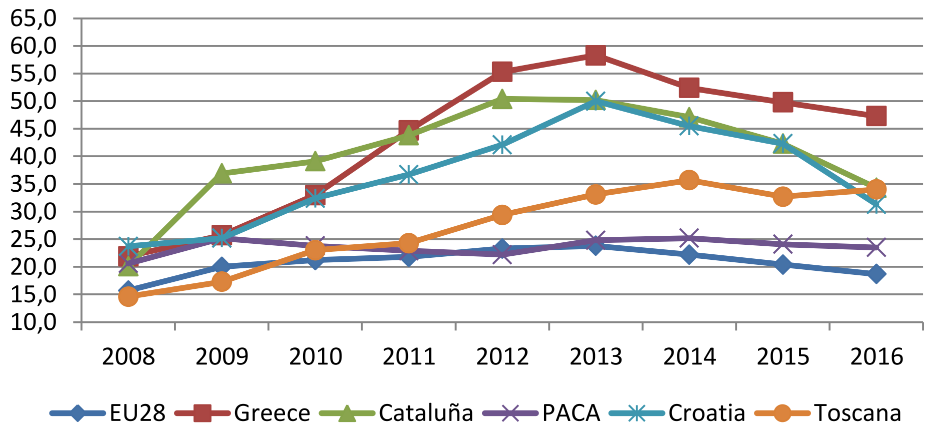
| *Absolute values* | | | | | |
|---|---|---|---|---|---|
| *Area* | *20-24* | *25-34* | *35-44* | *44-64* | *Total* |
| EU 28 | 29.296.378 | 65.597.918 | 70.890.787 | 140.098.606 | 305.883.689 |
| Greece | 558.125 | 1.301.807 | 1.617.673 | 2.921.782 | 6.399.387 |
| Catalunya | 352.141 | 881.500 | 1.271.695 | 1.994.391 | 4.499.727 |
| PACA | 265.814 | 568.720 | 619.795 | 1.328.548 | 2.782.877 |
| Croatia | 243.706 | 546.331 | 566.992 | 1.181.640 | 2.538.669 |
| Toscana | 161.390 | 384.837 | 544.683 | 1.085.592 | 2.176.502 |
| *Percentages* | | | | | |
| *Area* | *20-24* | *25-34* | *35-44* | *44-64* | *Totale* |
| EU 28 | 9,6 | 21,4 | 23,2 | 45,8 | 100,0 |
| Greece | 8,7 | 20,3 | 25,3 | 45,7 | 100,0 |
| Catalunya | 7,8 | 19,6 | 28,3 | 44,3 | 100,0 |
| PACA | 9,6 | 20,4 | 22,3 | 47,7 | 100,0 |
| Croatia | 9,6 | 21,5 | 22,3 | 46,5 | 100,0 |
| Toscana | 7,4 | 17,7 | 25,0 | 49,9 | 100,0 |

The Global Coworking Survey highlights that while “coworking spaces are growing older, (...) the current average age of coworking space members is a little over 36 years, compared to 35 years in the previous year”. The oldest members are entrepreneurs with staff (average age 40 years), followed by freelancers (38 years); the youngest are employees (33 years; Foertsch 2017). Moreover, it has to be remembered that young people have been one of the social groups hit hardest by the global financial crisis: in table 16 and figure 15 it is possible to notice that while in the whole EU the increase on unemployment rates in age group 15-24 between 2008 and 2016 has been not negligible but all in all restrained, in some of Coworkmed countries the percentage has more or less doubled (see the impressive figures about Greece and Tuscany). EU shift from "policy promoting small and medium-sized enterprises towards policy promoting entrepreneurship" has therefore been "partly driven" by the steady decline in youth employment rates registered in many Member States (Eurofound 2016: 1).

*Table 16. Unemployment rates (%) from 15 to 24 years in EU and Coworkmed territories. 2008-2016*

| *Area* | *2008* | *2009* | *2010* | *2011* | *2012* | *2013* | *2014* | *2015* | *2016* |
|---|---|---|---|---|---|---|---|---|---|
| EU28 | 15,7 | 20,0 | 21,2 | 21,8 | 23,3 | 23,8 | 22,2 | 20,4 | 18,7 |
| Greece | 21,9 | 25,7 | 33,0 | 44,7 | 55,3 | 58,3 | 52,4 | 49,8 | 47,3 |
| Catalunya | 20,1 | 36,9 | 39,1 | 43,8 | 50,4 | 50,2 | 47,1 | 42,3 | 34,3 |
| PACA | 20,6 | 25,2 | 23,8 | 22,9 | 22,2 | 24,8 | 25,2 | 24,1 | 23,5 |
| Croatia | 23,7 | 25,2 | 32,4 | 36,7 | 42,1 | 50,0 | 45,5 | 42,3 | 31,3 |
| Toscana | 14,6 | 17,3 | 23,0 | 24,3 | 29,4 | 33,1 | 35,7 | 32,7 | 34,0 |

*Figure 15. Unemployment rates (%) from 15 to 24 years in EU and Coworkmed territories. 2008-2016*




### *5.3. Education*

It is well known that coworkers are highly educated. According to the Global Coworking Survey "around 85% of them have finished an academic education. 41% currently hold a bachelor's, another 41% have a master's and 4% have already received their doctorate", with small differences between coworkers according to their professional status (Foertsch 2017). According to another, more localised but equally meaningful source (dealing with coworkers active in coworking spaces in the city of Milan), the percentage of users with at least a bachelor's was in 2014 around 85% (at that time, in Italy the percentage of people with the same education level was around 20%); even more meaningful, 49% of coworkers had at least a parent with a bachelor's (22% both parents; Colleoni, Arvidsson 2014).

Our census confirms this feature (table 17): the percentage of users with at least the first stage of tertiary education (ISCED 5-8) is in all territories at least around 60% (like in Catalunya) or higher (even much higher, like in Tuscany, where the corresponding percentage is almost 84%). It is worthy to notice, moreover, the high percentage of users with a phd in Catalunya (18%), Greece (17,5%) and PACA (13,2%).

*Table 17. Users by education attainment level (percentages) in Coworkmed territories*

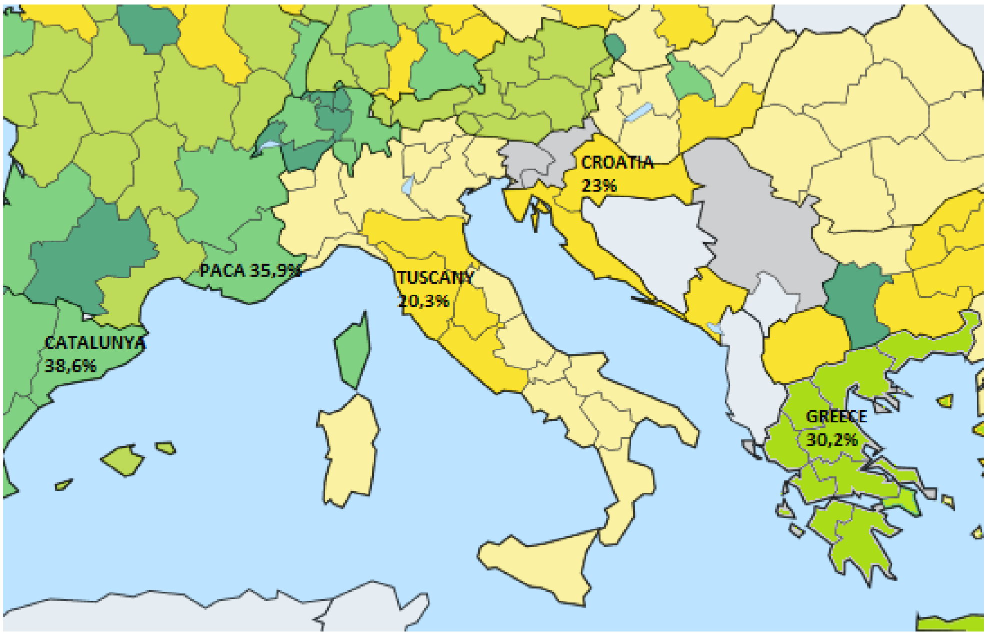
| *Education* | *Catalunya* | *Croatia* | *PACA* | *Greece* | *Tuscany* |
|---|---|---|---|---|---|
| Less than primary, primary and lower secondary education (ISCED 0-2) | 20,0 | 4,4 | 2,1 | 6,9 | 1,5 |
| Upper secondary and post-secondary non-tertiary education (ISCED 3-4) | 20,5 | 20,2 | 20,6 | 22,1 | 14,7 |
| Short-cycle tertiary education, or equivalent level, Masters or equivalent level (ISCED 5-7) | 41,5 | 70,3 | 64,1 | 53,4 | 74,6 |
| Doctoral or equivalent level (ISCED 8) | 18,0 | 5,0 | 13,2 | 17,5 | 9,2 |
| Total | 100,0 | 100,0 | 100,0 | 100,0 | 100,0 |

The above mentioned percentages are even more significant if compared with the percentage of population aged between 25 and 64 years in Coworkmed territories (table 18 and figure 16). While coworkers with at least tertiary education (ISCED 5-8) are in all territories the large majority, the incidence of the same group on the overall population between 25 as 64 is not higher than 38,6% (in Catalunya) and represents only 20,3% in Tuscany.

*Table 18. Percentage of population aged 25-64 with tertiary education (levels 5-8 ISCED) in EU and Coworkmed territories*

| *Area* | *2012* | *2013* | *2014* | *2015* | *2016* |
|---|---|---|---|---|---|
| EU 28 | 27,7 | 28,6 | 29,3 | 30,1 | 30,7 |
| Greece | 26,1 | 27,4 | 28,1 | 29,1 | 30,2 |
| Catalunya | 32,8 | 34,8 | 37,0 | 37,5 | 38,6 |
| PACA | 31,1 | 33,2 | 34,9 | 35,6 | 35,9 |
| Croatia | 18,5 | 19,8 | 21,3 | 22,7 | 23,0 |
| Tuscany | 16,9 | 17,0 | 17,4 | 19,3 | 20,3 |

*Figure 16. Percentage of population aged 25-64 with tertiary education (levels 5-8 ISCED) in Coworkmed territories (2016)*




### *5.4. Professional condition*

Users' professional condition has been investigated by asking to coworking managers: a) to estimate in percentage the incidence of freelancers, startuppers, small teams and SMES; b) to list the first three professions attending their spaces.

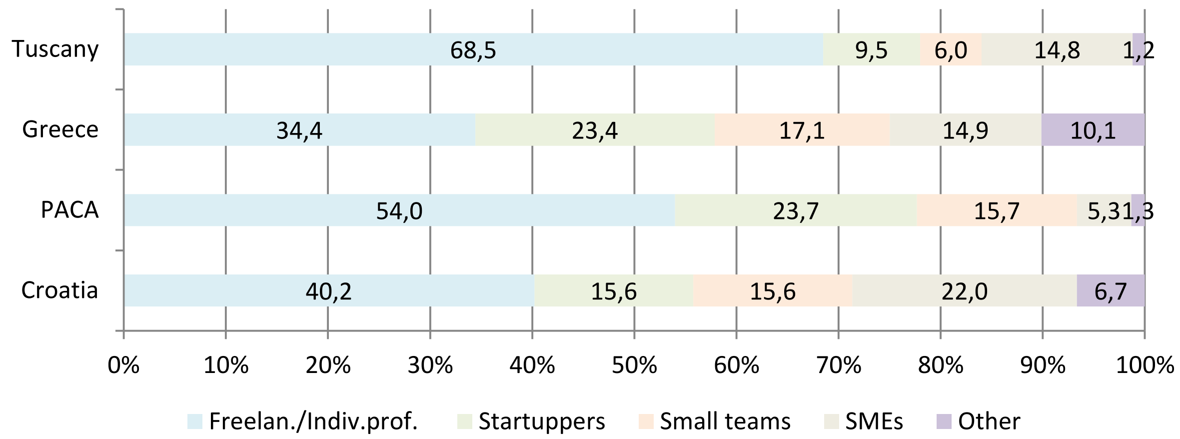
Table 19 and figure 17[6] shows that inall Coworkmed territories freelancers are the most frequent professional group, even if the size of their prevalence is quite differentiated: they are a strong majority in Tuscany (68,5%) and PACA (54%), while in Greece they are followed not very far from the startuppers (23,4%). Croatian coworking spaces are characterised by a significant percentage of SMEs (22%).

*Table 19. Users' professional conditions by country/region (percentages)*

| *Professional condition* | *Croatia* | *PACA* | *Greece* | *Tuscany* |
|---|---|---|---|---|
| Freelancers/indiv. professionals | 40,2 | 54,0 | 34,4 | 68,5 |
| Startuppers | 15,6 | 23,7 | 23,4 | 9,5 |
| Small teams | 15,6 | 15,7 | 17,1 | 6,0 |
| SMEs | 22,0 | 5,3 | 14,9 | 14,8 |
| Other | 6,7 | 1,3 | 10,1 | 1,2 |
| Total | 100,0 | 100,0 | 100,0 | 100,0 |

[6] See above, note 4.

*Figures 17. Users' professional conditions by country/region (percentages)*




With regard to the aforementioned point b), tables 20 and 21 show the results. 38 coworking managers filled in this section of the questionnaire: the prevalence of programmers, developers and all professions related to the ICT sector is evident (they are mentioned in twenty cases in first place, and in 29 cases among the first three places). Media and Communication professionals follow at distance, being mentioned only in four cases in first place, and in 19 between the first three. In Table 22, the great dispersion of professions under the "others" label, including producers, writers, training professionals, deserves to be noted. ICT professions are the most frequent professions also according to Deskmag Survey: the most up-to-date data show that these professions "were able to slightly increase their ratio compared to the previous year" (from 20% to 22%; Foertsch 2017).

*Table 20. Profession indicated as #1 in ranking by coworking managers*

| *Profession* | *N. of mentions* |
|---|---|
| ICT professions (programmers/developers/webmasters/webdesigners) | 20 |
| Designers/Graphic Designers | 6 |
| Media and Communication (journalists/PR/Events organisers) | 5 |
| Training professionals | 4 |
| Others (tourism professionals, surveyors, manufacgturers) | 3 |

*Table 21. Professional conditions mentioned as the most frequent three by coworking managers*

| *Profession* | *N. of mentions* |
|---|---|
| ICT professions (programmers/developers/webmasters/webdesigners) | 29 |
| Designers/Graphic Designers | 19 |
| Media and Communication (journalists/PR/Events organisers) | 8 |
| Others | 40 |

## Summary

This report presents the results of the survey carried out in territories involved in Coworkmed project to realise a census of coworking spaces and coworkers (activity 3.3.1).

The report is oriented to analyse the main characteristics of coworking spaces (year of foundation, legal status, being part of a platform or not, location) and users' profiles (sex, age, education, professions).

The survey has been carried out in two different stages. The first ended on June 23rd with a low response rate (11.6%). Due to the unsatisfactory outcome, in Barcelona Coworkmed partners took two major decisions: a) to put in place a second stage of the census by decentralising the data collection activity; b) to better integrate the research tools regarding census (3.3.1) and other studies (3.5, 3.6 and 3.7). After the adoption of a unified tool of research, each partner has been left free to decide how to submit the research tools to their own recipients (the list of national/regional coworking spaces). The second stage of the census has been carried out from September to November 2017. The resulting dataset was finalised at the end of December (in view of the Larissa workshop in January 2018). The decentralised management of the census proved to be effective: the response rate, increased to more than 30% (99 coworking spaces out of a total of 320).

The main results are displayed as follows:

- Coworking spaces in the Coworkmed area represent around 2,3% out of total estimated coworking spaces in the world.
- They started their activities before 2012 mainly in Catalunya (10 out of 40 of the Catalan spaces). As for the following years data are quite balanced.
- Coworking spaces in Coworkmed area responding to the survey are mainly led by societies (66,7%); when specified, these societies are mainly limited companies; if public institutions are involved, as direct owners or partners, they are mostly local administrations or municipalities.
- One out of four coworking spaces are connected to a platform, and two out of three among them are connected to a national network (national networks prevail in PACA, Tuscany and Catalunya).
- 81% of cowrking spaces are located in a urban area (but in PACA there is a relevant number of spaces located in a rural area); in Croatia the localisation is strongly influenced by

the structural conditions (real estate conditions and price), while in Greece and Tuscany pre-existing initiative appear as a most relevant factor.

- About the kind of territorial needs related to coworking spaces localisation, the most frequent responses refer to the existence of ecosystem connections, to the uniqueness of the space in a specific location, and above all to the accessibility thanks to the geographical position (proximity to the transport networks or hypercentrality).
- Coworkers' profiles arising from the data show that in the Coworkmed area gender distribution is balanced and that coworkers are young if compared to the overall population in work age: the group aged between 25 and 34 is the most frequent, even if with not negligible differences among Coworkmed countries and regions (Tuscany, PACA and Catalunya have a higher incidence of coworkers aged over 35).
- Confirming all information taken from previous sources, also coworkers of the Coworkmed area are highly educated: the percentage of users with at least the first stage of tertiary education (ISCED 5-8) is in all territories at least around 60%, with significant percentages of coworkers holding a Phd.
- Freelancers are the most frequent professional group, even if the size of their prevalence is quite differentiated among Coworkmed territories; as for professions, the prevalence of programmers, developers and all professions related to the ICT sector is evident.

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## Annex 1. The questionnaire

0. General data

Coworking Name_
Full Address_
Legal Status_
Office space (in square-meters, approximately) _

*Employers and employees*

□ How many permanent employees did the coworking space employ at the end of the 2016?
- How many of them were full-time? _

□ How many temporary employees did the coworking space employ at the end of the 2016?
- How many of them were full-time? _

*Short description of the coworking space history*

□ Year of Foundation_

□ Is the Coworking space part of a larger network or a platform? _
Y/N
- If Yes, is it a national or an international network/platform? _
National/International

□ Please describe briefly (max 600 characters) the origin of the coworking space in terms of groups/people taking the first initiatives and partnerships (if existing) _

1. Geographical localization and interactions with business/social local environment

□ The coworking space is located in a:
- Urban area
- Periurban area
- Rural area

□ Which are the main reasons why your coworking is located in the actual site?
(Rate each variable following this scale: 1= not relevant; 2= quite relevant; 3= relevant; 4= very relevant)
- Real estate conditions (pre-existing ownership or availability of a specific building/area)
- Price affordability of the space/location
- Pre-existing social or economic initiatives by the founders in the area of the site
- Other

□ Do you agree or disagree with the following statements regarding the coworking space specificities due to your peculiar geographic localisation?
(1= strongly disagree; 2= somewhat disagree; 3= neither agree nor disagree; 4= somewhat agree; 5= strongly agree)
- Our localisation provides us higher opportunities to interact with a specific target of members/users
- Our localisation allows us to interact and develop partnerships with external actors/enterprises/ centres/universities
- Our localisation fullfills specific needs and demands of our territory

□ Only if you grade 4 or 5 to the previous question on territorial needs and demands: please, briefly specify the kind of needs and demands you are referring to:_

□ Interactions with other centers or services: please rate for each typology in the list the level of interactions in terms of relevance and frequency: 1= very low; 2= low; 3=medium; 4= high; 5= very high)

| | Relevance | Frequency |
|---|---|---|
| - University/Universities | ________ | ________ |
| - Business centres | ________ | ________ |

- Fab lab ________ ________
- Living Lab ________ ________
- Private investors ________ ________
- Business incubators/accelerators ________ ________
- Municipality/City Council ________ ________
- Regional administration ________ ________
- Other private actors (please specify) ________ ________
- Other public authority (please specify) ________ ________

□ Spill-Over and Spin-off effects. Please describe (if existing) spill-over or spin-off effects generated by interactions with one or several of the external actors previously listed_

2. Sectors of activity

□ Does a sectoral specialisation of the coworking space exist?
Y/N
- If Yes:
    □ Which is the sector?
    - Manucfacturing
    - Creative industries
    - Social innovation, social policies
    - ICT
    - Other
    □ Is this specialisation linked to the origin of the coworking space or has it arisen all along the evolution of the activities?
    (1= strongly disagree; 2= somewhat disagree; 3= neither agree nor disagree; 4= somewhat agree; 5= strongly agree)
    - The sectoral specialisation is linked to the way in which the coworking has been founded
    - The sectoral specialisation is due to changes occurred while operating with users/members and external actors
    - The sectoral specialisation is due to changes occurred in the social/business environment
    - The sectoral specialisation is the result of a mix between the two previous answers
    - Other

3. Members/users profiles

□ Please provide a socio-demographic description of your members/users indicating an estimate (in percentage) for each one of the following variables:

*Gender*
- Male %_
- Female %_

*Age groups*
- Up to 24 %_
- 25-34 %_
- 35-44 %_
- 45+ %_

*Education*
[ISCED Classification 2011, http://www.uis.unesco.org/Education/Documents/isced-2011-en.pdf]
- Less than primary, primary and lower secondary education (ISCED 2011 levels 0-2) %_
- Upper secondary and post-secondary non-tertiary education (ISCED 2011 levels 3 and 4) %_
- Short-cycle tertiary education, Bachelor's or equivalent level, Master's or equivalent level (ISCED 2011 levels 5-7) %_
- Doctoral or equivalent level (ISCED 2011 level 8) %_

*Professional condition*

- Freelancers/individual professionals %_
- Startuppers %_
- Small Teams %_
- SMEs %_

Other(s) %_

□ Please indicate the first three professionals figures (examples: media professionals, designers, developpers, ecc.) in terms of attendance of the coworking space (please indicate the estimated percentage of each figure out of the overall number of users/members)

1) _
2) _
3) _

<u>4. Services offered</u>

□ Opening hours of the coworking space_

□ Number of desks/workstations_

□ Which percentage of the coworking space surface is dedicated to (if a specific space doesn't exist – for instance private meeting rooms -, please write "0%"):

- Shared working areas ) %_
- Private meeting rooms ) %_
- Conference rooms %_
- Other spaces (bar/cafès/kitchen/leisure spaces etc.) %_

□ Which of these common spaces/facilities are present in the coworking space (Y/N)?

- Restaurant/Snack bar
- Bar/Café
- Conference room(s)
- Recreational spaces
- Childcare facilities
- Other%_

□ Beyond the previously listed ones, which of these services do you offer to your members/users (Y/N)?

- Library
- Parking
- Seminars
- Training sessions
- Events and/or workshops
- Web hosting
- Registered office hosting
- Videoconferencing

□ Does the coworking space employ specific figures or facilitators <u>exclusively</u> to promote relationships between members/users and to enhance the community (facilitators, mentors) (Y/N)?

- If Yes, how many? _