

A COMPARISON OF EUROPEAN AND AMERICAN COWORKING SPACES. DRIVERS,  
SPATIAL CHARACTERISTICS AND MANAGEMENT STRUCTURES

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SOMMARIO

Even though the USA are considered the country where the coworking phenomenon first emerged in the mid-2000s (Kojo & Nenonen, 2017), most of the available literature focuses on European CS. There is room for exploring the different approaches to coworking spaces in Europe and in the USA with a more rigorous method. This paper proposes a first parallel study between Italian and American coworking spaces. The study uses descriptive statistics and geo-referenced mapping, based on two datasets that are developed by the authors for the cities of Milan (Italy) and New York City (USA) through desktop search.

These are analysed for what regards: type of building, land use, general business model (i.e. if they are networked or not), and year of foundation. The disparities coming to light partially reflect the geographic and socio-economic structure of the two countries, as well as the varied cultures and habits. Nevertheless, both regions acknowledge the community making and flexible working attitude provided by CS.

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# 1 Literature review

Coworking spaces (CS) have received massive attention from the media (e.g. <http://www.deskmag.com/>), but there is still large room for scientific studies in the field, mainly due to the novelty of the practice and its variety. The USA are considered the country where the coworking phenomenon first emerged in the mid-2000s (Kojo & Nenonen, 2017). This happened when in 2005 Brad Neuberg, a San Francisco software developer, found the first coworking space (Garrett, Spreitzer, & Bacevice, 2017a; Spinuzzi, 2012; Yang, Bisson, & Sanborn, 2019).

Scientific elaborations on coworking define it, first of all, as a service (Spinuzzi, 2012), which fit the theory of a progressive shift to Space-as-a-Service (SaaS) business models.

However, most of the available scientific literature focuses on European CSs, and a significant corpus of knowledge was developed in Italy.

**European contributions** have been mainly written by geographers, urban and regional economists, sociologists, and planners. Their studies often analyse single cities, such as in the cases of Rome and Milan in Italy (Fiorentino, 2019; Mariotti, Pacchi, & Di Vita, 2017), Barcelona in Spain (Coll-Martínez & Méndez-Ortega, 2019; Parrino, 2015), Helsinki in Finland (Di Marino & Lapintie, 2015; Kojo & Nenonen, 2010), London in the UK (Gandini & Cossu, 2019), and a few Dutch cities (Weijs-Perrée, van de Koeving, Appel-Meulenbroek, & Arentze, 2019).

Conversely, most of the extant debate on the **American context** has been produced through grey literature (Yang et al., 2019), such as anecdotal articles (Hubbard, 2018; Sisson, 2019) on real estate and design blog networks (e.g. <https://www.curbed.com/>), magazine articles (Spreitzer, Bacevice, & Garrett, 2015), company reports (e.g. Colliers, Cushman & Wakefield), and university newspapers (Green, 2014; Spreitzer, Garrett, & Bacevice, 2015; Wright, 2018; Zhou, 2019b). These address issues such as rural development and remote working (e.g. Hubbard, 2018; Sisson, 2019), real estate and coworking business models (e.g. Green, 2014; Zhou, 2019c) and community building mechanisms (Garrett, Spreitzer, & Bacevice, 2017b). Overall, different themes prevail in the two geographical areas: entrepreneurship, education and spatial/design characteristics for US papers; and innovation, economic effects, location factors and impacts at the urban scale for IT papers.

## 1.1 Gaps and Objectives

Extant literature is still scarce in cross-country comparisons, that could explain some empirical evidence, such as differences in location factors, aggregation trends, size, building types, building ownership, real estate business model, management structure, variety of users, provision of services and spaces, activities fostering community and network bonds, and more.

Moreover, most of the past studies on the topic are based on qualitative research. This is also motivated by the fact that no extensive databases exist collecting multiple country data.

Therefore, this paper contributes to fill these gaps by comparing CS in Italy and in the USA with a first exploratory analysis. The first objective was to build up an updated and comprehensive list of coworking spaces in Milan and NYC. The second objective was to quantitatively analyse the key characteristics of the existing spaces in the two cities. In particular, this study focuses on the following issues:

- Characteristics of CS in Milan and NYC investigated through type of building, land use, general business model (i.e. if they are networked or not), and year of foundation;
- Geographical distribution in the two cities of Milan and NYC, to understand main location patterns and aggregation trends.

## **2 Methodology**

First, all active CS in Milan and NYC were listed between April and June 2020 based on multiple approaches. The database of Milan derives from a larger database, including 549 coworking spaces and 130 makers spaces and fab labs across Italy, that was developed within the FARB research project founded by DASTU-Politecnico di Milano between 2016 and 2018, and coordinated by Ilaria Mariotti, Mina Akhavan and Stefano Di Vita. Within the COST Action 18214, the authors elaborated on that basis by verifying the existence of the same CS in 2020 and by integrating the list with new data provided by Italian Coworking. The database of New York City was put together mainly from the open source website CoWorker.com. Given the absence of any other source of information for this city, we relied on the approach that had been already adopted in previous studies. The choice of using this source for an initial collection of data about coworking spaces derives from the fact that: (a) it includes the majority of world's cities within 168 countries; (b) it is the most updated website (last data entered from February 2020) in terms of verified coworking spaces.

Then, the dataset was explored. The methodology employs descriptive statistics and GIS mapping.

## **3 Findings**

The database is now presented in an excel sheet, which accounts for:

- o 264 CSs in the NYC area, of which 248 are located in the city boundaries; and
- o 185 CSs in Milan, of which, including 19 makerspaces/fablabs.

In NYC, CSs are hosted mostly in office or commercial buildings, while in Milan they are often found in residential buildings. In NYC less than half of the coworking spaces have one single location, whereas the majority count more locations. In Milan the vast majority has one single location. However, most coworking spaces with more than one location count only two spaces in the same city. A large international network (i.e. ImpactHub) is present with one location in Milan. Coworking spaces with more than 5 locations are present exclusively in NYC. In NYC, a few CSs have opened in the last decade of the 20<sup>th</sup> century, whereas most of the youngest CSs in Milan have been founded between 2008 and 2009.

## **4 Discussion**

Briefly, CS in the USA show to be managed by professional or semi-professional companies. WeWork, ServeCorp and other networked CSs are often mentioned as the most influential trend-setters, while smaller creative communities remain underrepresented (Green, 2014). In Italy, despite exceptions like Impact Hub global network and Talent Garden, the panorama looks dominated by 'social' and 'start-up' incubators (Fiorentino, 2019), typically small, very small, and single location CS. These differences partially reflect the economic structure of the two countries. Italy is characterized by small and very small firms mainly developed within industrial districts (Becattini, 1979). The American economy, on the contrary, is dominated by big players. Even though small enterprises have multiplied and account for about half of all USA workers, regional convergence is still limited (Miles, 2019).

## **5 Conclusions and potential expansion**

The paper offers a first comparison between Italian and North American CS. It would be interesting to expand this comparison to the Nordics, where CS tend to be public and hosted in either public libraries or university campuses (Di Marino & Lapintie, 2015; Kojo & Nenonen, 2010). Both countries register difficulties in the profitability of the coworking space model. Further research on the business models is necessary, even though financial data is not publicly available (Sargent, 2016; Yang et al., 2019), to enhance stability and create more sustainable models of coworking.

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