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New trends in the development of office sharing: guidelines for public policy

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Abstract: The purpose of the study is to reveal office sharing as a form of organisation of economic relations in the model of shared consumption, as well as to determine the role of government regulation in stimulating the development of office sharing. The authors studied the components of office sharing [co-working spaces and 'office as a service' (OaaS)] and highlighted their advantages. The factors determining the nature of the development of office exchange in Russia are emphasised. The dynamics of the development of office sharing in Russia, including in the regional dimension, are analysed. The authors formulated proposals to enhance the development of office sharing in the regions of Russia through the implementation of state policy (ensuring security and improving institutional regulation; creating conditions for ensuring the growth of this sector of the sharing economy by optimising the implemented business models; increasing its stability).

Keywords: office sharing; state policy; sharing economy; economic relations; institutional regulation; co-working.

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1 Introduction

The change in the economic paradigm, the inevitable transformation of social processes, the increase in problems and risks due to the excessive development of the 'consumer society', as well as the digitalisation and network development of public relations have led to modified consumer behaviour and the emergence of new forms of economic relations – the economy of shared consumption (Lymar, 2018; Tavbulatova, 2013; Gukasyan et al., 2022).

Possible access, rather than ownership of physical and human assets, determines the content of the shared consumption economy (Botsman and Rogers, 2010), and the collective use of goods and services, exchange and rent allow society to break out of the model of overconsumption.

The economy of shared consumption extends to various areas of activity: rent of things, search for transport, rent of premises for work, short-term rental of housing, parking, and knowledge.

Rental of office space – in other words, co-working or office sharing, hybrid spaces, agile office, smart office new model for real estate owners and small businesses based on the concept of a service approach to office rental is becoming increasingly popular in megacities where commercial real estate markets are most developed (Shaikomalova, 2018).

Despite the innovative nature and the possibility of using technologies to change the usual business models, office sharing is not without drawbacks that hinder the development of this segment of the sharing economy in the regions.

Analysis of the current situation and assessment of the level of penetration of office sharing in the regions of Russia are relevant topics for modern research.

2 Materials and methods

Botsman and Rogers (2010), Sundararajan (2014), Dillahun and Malone (2015), Frenken et al. (2015), Lyman (2018), Glukhov and Glukhova (2019) and Filimonova et al. (2020) in their research describes the specific features of the sharing economy, as well as the benefits derived from the implementation of models of shared consumption by all participants in economic relations.

In particular, the authors point out that the economy of shared consumption differs from existing markets in the content of the transaction process and the exchange of products, as well as in the equality of relations between market participants and a high degree of trust between them. The main reasons for participating in joint consumption are the desire to obtain economic benefits as a result of meeting the need for a product or service, as well as the presence of unrealised social needs for mutual assistance and the development of new relationships. For example, the authors prove that the use of digital platforms and mobile apps contributes not only to the optimisation of the applied models of shared consumption but also to the formation of communities for communication between people (Heinrichs, 2013; Sundararajan, 2016).

The sharing economy extends to various sectors of the national economy, which provide transactions between individual participants and organisations through electronic platforms: joint exchange, donation of used goods; joint financing (crowd-funding and peer-to-peer lending); peer-to-peer placement (providing households with access to unused space); peer-to-peer transport (sharing a car or parking); professional services of freelancers ‘on demand’ (administration, consulting and accounting); household services ‘on-demand’ (freelance markets that perform household tasks such as grocery delivery) (Shmeleva et al., 2020; Kiryak, 2019; Avdokushin and Kuznetsova, 2020; Tiarcenter, 2020).

One of the most promising sectors of the sharing economy is office sharing, which has emerged as a result of the high cost of renting non-residential premises and the generational change in the labour market. This form of organisation of joint consumption meets the requirements of the time: flexible office spaces combine modern technologies, networking and elements of the educational environment and create a comfortable working space for interested users (Golikova and Lopatkin, 2017; Borisenko, 2016; RBC, 2020; Karpunina et al., 2023b).

The dynamics of the development of the sharing economy sectors in different countries and regions differ significantly due to the differentiation of the level of access to the Internet, distinctions in the level of digital infrastructure formation, the prevalence of consumer demand in large cities over rural areas, and the goals of the implemented regional policy (Gusev et al., 2021; Bychkova et al., 2020; Filimonova et al., 2016; Dostmohammad and Long, 2015; Shmeleva et al., 2020; Karpunina et al., 2022a).

The purpose of the study is to reveal office sharing as a form of organisation of economic relations in the model of shared consumption, as well as to identify its regional specifics in Russia.

2.1 Research objectives

- 1 Identify the specific features of office sharing as a form of organisation of economic relations in the model of shared consumption.
- 2 Analyse the dynamics of the development of office sharing in Russia.
- 3 Formulate proposals for the intensification of the development of office sharing in the Russian regions.

Methods used in the research: method of theoretical analysis and synthesis, graphic method, method of systematisation, logical, dialectical methods, system approach, graphical method, method of comparative analysis. The method of theoretical analysis and synthesis is used by the authors to reveal the specifics of office sharing as a form of organisation of economic relations in the model of shared consumption. The method of systematisation allowed the authors to highlight the advantages of office-sharing and the Russian specifics of office-sharing development. The graphical method is used to reflect the dynamics of the development of the office-sharing sector in Russia and, in particular, to demonstrate the distribution of co-working spaces in the regions of the country. In the process of forming proposals for intensifying the development of office sharing in the Russian regions, the authors used logical and dialectical methods, as well as a systematic approach. The methodology used has no limitations and can be used for further research on the economy of shared consumption.

3 Results and discussion

3.1 Specific features of office sharing as a form of organisation of economic relations in the model of shared consumption

Modern realities are such that the intensification of digital development causes changes in the established norms of social behaviour of people, the principles and forms of organisation of labour activity, and the way of life (Karpunina et al., 2023b, 2023c, 2023d).

Increasing the mobility of people and expanding the opportunities to carry out work duties without being physically tied to a specific place, switching to a flexible work schedule, and combining work for hire with the creation of their own business, created the prerequisites for reducing the importance of the office and using elements of

innovative infrastructure to perform work outside the office (Golikova and Lopatkin, 2017; Menshikova, 2019).

This functionality is now performed by flexible workspaces-co-working spaces, that is, spaces that provide premises and equipment for innovative companies at discounted prices. Co-working centres provide the following types of traditional services: Internet access with pre-defined characteristics, a variety of tables and chairs, the availability of storage cells, the availability of a printer for printing and photocopying, water, tea, coffee, cookies, etc., the ability to secure a place, rent a separate table for 2–4 people, rent meeting rooms, car/bike parking (Coworking, 2019).

The second component of office sharing – ‘office as a service’ (OaaS) – is the rental of user workstations directly. In this case, the customer forms their fleet of leased devices, both standard (a simple laptop for ordinary tasks with standard office applications, a powerful laptop for specific tasks), and other device formats (a monoblock, a classic PC or a business tablet). The equipment remains in the vendor’s ownership, is supported by the services is updated promptly, and is also provided for rent on favourable financial terms for customers. The operating system and the necessary applications (office suite, antivirus, email client, and others) are licensed with the possibility of monthly payment and without obligations under the terms of the contract (Softline, 2017). Thus, the client does not invest huge amounts of money and time in creating their services but uses the ready-made subscription to the required extent at the moment and can ask for support and advice in a convenient format around the clock.

Table 1 Advantages of office sharing as a form of economic relations

<i>Advantage</i>	<i>Content</i>
Harnessing the potential of flexible workspaces	<ul style="list-style-type: none">• Flexible terms of office rental, including the rental time, number of employees.• Flexible subscription system.
Access to different job formats	Differentiation of workplace formats by size, space organisation, functionality, and equipment (Karpunina et al., 2023b).
Providing a variety of services for business support and development	<ul style="list-style-type: none">• Educational, consulting, and legal services.• Networking.• Assistance in attracting partners, customers and investors (Krause, 2019; Zakirova et al., 2020).
Improving the efficiency of property use	Dosing capabilities and minimising the scale of use.
Increase the availability of services and optimise operating costs	<ul style="list-style-type: none">• Achieved by strengthening horizontal links and sharing most of the operating costs among all participants.• The cost of services is reduced, the speed of their provision is increased.
Collaboration	Positive cooperation is associated with the ability to cooperate with many individuals and involves the achievement of public interests (Jeon et al., 2011).

Source: Compiled by the authors

This specificity of the organisation of office sharing allows authors to present it as a form of economic relations that arise between entities (households, organisations), based on the collective use of goods and services, barter or lease on the terms of temporary access

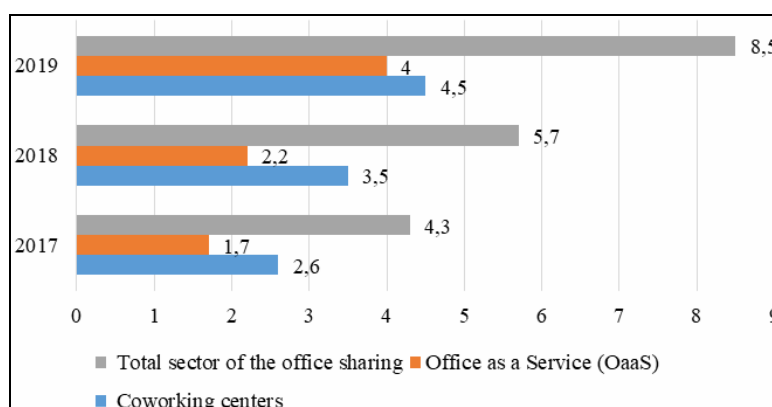
to the product, which can optimise the consumption of goods and services. This form of economic relations is due to the adaptation of private property within the framework of micro, small and medium-sized businesses to the conditions of the new digital reality. The advantages of office sharing are presented in Table 1.

The basis of the economic relations of office sharing is the monetisation of idle areas of non-residential real estate objects due to their connection to the system of sharing spaces for short-term rent.

3.2 Dynamics of the development of office sharing in Russia and the regions

In 2019, the volume of transactions on the main co-consumption platforms in Russia amounted to about 769.5 billion rubles. The growth rate increased, and the annual increase was 50% (RAEC, 2020). The Russian office-sharing sector showed similar dynamics. In 2017–2019, the office-sharing sector grew from 4.3 to 9 billion rubles. In 2019, the growth was 60% (Figure 1).

Figure 1 Dynamics of the development of the office sharing sector in Russia, 2017–2019 (see online version for colours)



Source: Compiled by the authors according to RAEC (2020)

The office-sharing sector in Russia is mainly formed through two main models: co-working and ready-made offices (OaaS).

The Russian specifics of the development of office-sharing are due to the high concentration of the population and consumer demand in cities with millions of inhabitants. That is why the development of office sharing began in the capital region and several major cities of the country. The city of Moscow lags behind European and North American megacities by 2–3 times in terms of the availability of co-working per capita. Nevertheless, Moscow ranks 7th in the ranking of European cities in terms of the number of co-working spaces and is the leader in Eastern Europe. According to PwC, in 2017, there were about 120 smart offices in the Moscow region, 64% were in small workspaces with fewer than 50 seats. There were 35 of them in St. Petersburg, and 425 co-working spaces in Russia as a whole (RBC, 2020). By 2019, there were more than 260 co-working spaces in Moscow, with a total area of more than 100 thousand square meters. In 2018–2019, their number doubled (an increase of 49%).

In Moscow, there are co-working workshops (creative, carpentry co-working, techno-working, etc.), architectural co-working, offices for working mothers, ‘anti-café’, special offices for people engaged in the technological environment, and others. In addition, free work areas equipped based on Business service centres are increasingly gaining popularity, and spaces for the collective work of students, professors and entrepreneurs are opening up in universities, including regional ones (RBC, 2020).

The opening of co-working spaces in smart office centres contributes to an accelerated increase in the area of mini-offices. Many non-network players have their niche specialisation. In particular, IT industry centres, platforms for architects, co-working spaces for working mothers, and co-working workshops for seamstresses, jewellers, and other professionals are being launched. Users of flexible office solutions are increasingly becoming large companies in the ICT sector (for example, Yandex, MTS, and Tinkoff).

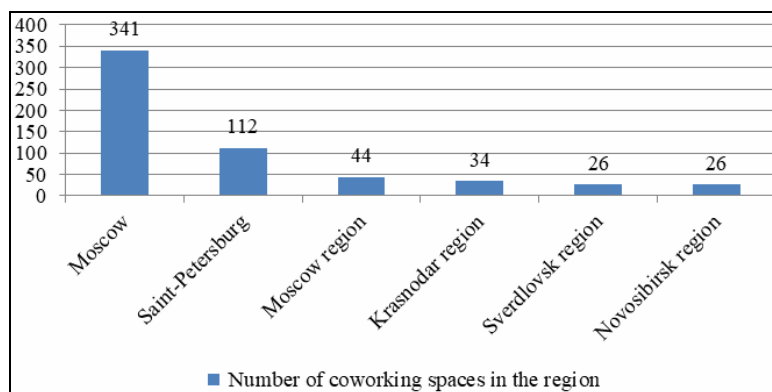
However, in the regions of Russia, the development of co-working is at an early stage. This is also because not all co-working sites bring profit to their owners. Some of them turn out to be social projects that are implemented on the terms of self-sufficiency and do not bring commercial profit. In particular, this applies to creative spaces and techno-workshops.

Nevertheless, the demand for short-term rental jobs in Russia exceeds the supply by almost 48 times, with continuous growth of both indicators. In 2018–2019, the volume of supply in the country as a whole increased by 60%, and demand – by 11%. The average price of renting a workplace is 13.9 thousand rubles per month (RBC, 2020).

In general, by 2020, co-working centres have been opened in 65 regions of Russia and 123 cities in the country.

The leaders in the number of co-working spaces are Moscow, St. Petersburg, the Moscow Region, the Krasnodar region, the Sverdlovsk region and the Novosibirsk region (Figure 2).

Figure 2 Distribution of co-working spaces in the regions of Russia, 2020 (see online version for colours)



Source: Compiled by the authors according to Coworking (2021)

Another eight regions of Russia have more than ten co-working spaces. Among them are the Republic of Tatarstan (20), the Republic of Bashkortostan (20), the Samara region

(20), the Rostov region (19), the Krasnoyarsk region (16), the Chelyabinsk region (14), the Nizhny Novgorod region (13), and the Tyumen region (12).

The leading cities in terms of the number of co-working spaces in Russia are Moscow and St. Petersburg. Excluding them from attention, the authors note that Yekaterinburg is the absolute leader in the number of co-working spaces: 23 spaces. The population of the city is 1,483,000, that is, for every 64,000 people there is 1 co-working centre. 16 of the 20 co-working spaces were opened in 2018. In Yekaterinburg, there is an international operator Regulus. The second co-working centre under the Regulus brand is opened in Chelyabinsk (Coworking Guide, 2021).

The second place is taken by Novosibirsk, where 21 co-working spaces are open for 1,613,000 people. Among them, there is one niche 'I sew easily', as well as a co-working for girls 'between us, girls'. More than half of the co-working spaces were opened in 2018.

Samara ranks third and has 16 co-working spaces per 1,157,000 people. Eight of them are open under the brand of the largest regional network 'Anik'. Co-working spaces 'Anik' are also open in Penza, Voronezh, and Tolyatti. In total, there are 15 spaces in the network. The average cost of renting a workplace was 3,600 rubles for one month (Coworking Guide, 2021).

In 2019, Russia saw the large-scale launch of four WeWork sites in Moscow. WeWork immediately became the fourth largest player by area in the Russian market.

Many Russian customers are becoming interested in the transfer of capital investments to operating ones, so there is an intensive development of 'the OaaS'. According to analysts, the demand for such services is growing – organisations in different industries are considering proposals for a service model for using IT services: networks of private clinics (standard white monoblocks in doctors' offices), design organisations (powerful graphics stations), banks (a fleet of laptops for employees) (Softline, 2017).

Co-working spaces are the workspaces that were the fastest to adapt to the changed reality during the COVID-19 pandemic and offer the market a product that meets the needs (Karpunina et al., 2022b, 2023b). However, among small companies, there has been a significant reduction in demand due to the transition to a remote work format. This caused the closure of non-network co-working sites or the takeover by large network co-working sites. For example, during the pandemic, We Work, SAP, Business Club, Space 1, SEOSPACES, and others have intensified their work. Large companies have started implementing strategies aimed at optimising office costs and have begun to prefer formats with flexible lease terms and low capital costs.

During the recovery of business activity, the demand for such spaces is steadily increasing (Openspace, 2020). Thus, the growth of flexible offices by the end of 2020 in the capital region was at least 55–60%, in St. Petersburg – 40–50%, in Yekaterinburg, Kazan, Novosibirsk, and the active development of co-working is also expected.

The development of various areas of the shared economy, in particular, the sharing office, is critical for the economic growth of the country, since they provide the so-called Pareto effect: 20% of the effort that gives 80% of the result.

The analysis of the dynamics of the development of office sharing in the Russian regions shows the potential for its growth and the emergence of new factors that contribute to its provision.

The key problems of office-sharing development in the Russian regions are security and imperfect institutional regulation, growth problems and instability. This requires the development of a set of measures aimed at overcoming existing restrictions. In particular, such measures should include:

- Ensuring the safety of all participants in economic relations and their protection from unscrupulous users who may cause damage to leased non-residential real estate.
- Institutional regulation of the quality of products and services exchanged by users. For example, the quality of the internet in co-working centres, the quality of specialised equipment that is rented out for short-term use on the terms of use.
- Increased activity of regulators. An example of such activity is Denmark, which was the first to allow property owners to report income directly to the territorial tax authorities. Pilot programs have been launched in some US states to determine the appropriate regulatory rules.
- Overcoming the growth problems associated with the imperfection of the implemented business models, which put companies operating under traditional schemes in unequal competitive conditions. For example, in addition to co-working and OaaS, there are companies on the market that use office space on the terms of collaborative long-term leases of traditional space (when small companies choose their neighbours based on the compatibility of fields of activity and corporate cultures). This mechanism for the implementation of lease relations at a certain stage of their development will benefit from office sharing.
- Overcoming the instability of the environment of interaction between the subjects of economic relations of office sharing by improving institutional regulation and ensuring the transparency of the business model.

4 Conclusions

The authors identified the specific features of office sharing as a form of organisation of economic relations in the model of shared consumption. The specifics of two components of office sharing are revealed: co-working spaces and 'OaaS'.

The advantages of office sharing as a form of economic relations are systematised. The authors analysed the dynamics of the development of office sharing in Russia. It is revealed that the development of office sharing in Russia is due to the high concentration of the population and consumer demand in cities with millions of inhabitants.

As of 2020, co-working centres are open in 65 regions of Russia and 123 cities in the country. The leaders in the number of co-working spaces are Moscow, St. Petersburg, the Moscow region, the Krasnodar region, the Sverdlovsk region and the Novosibirsk region.

The authors formulated proposals for the intensification of the development of office sharing in the Russian regions. The key areas of office-sharing development in the Russian regions are ensuring security and improving institutional regulation, creating conditions for ensuring the growth of this sector of the sharing economy by optimising the implemented business models, and increasing its stability.

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