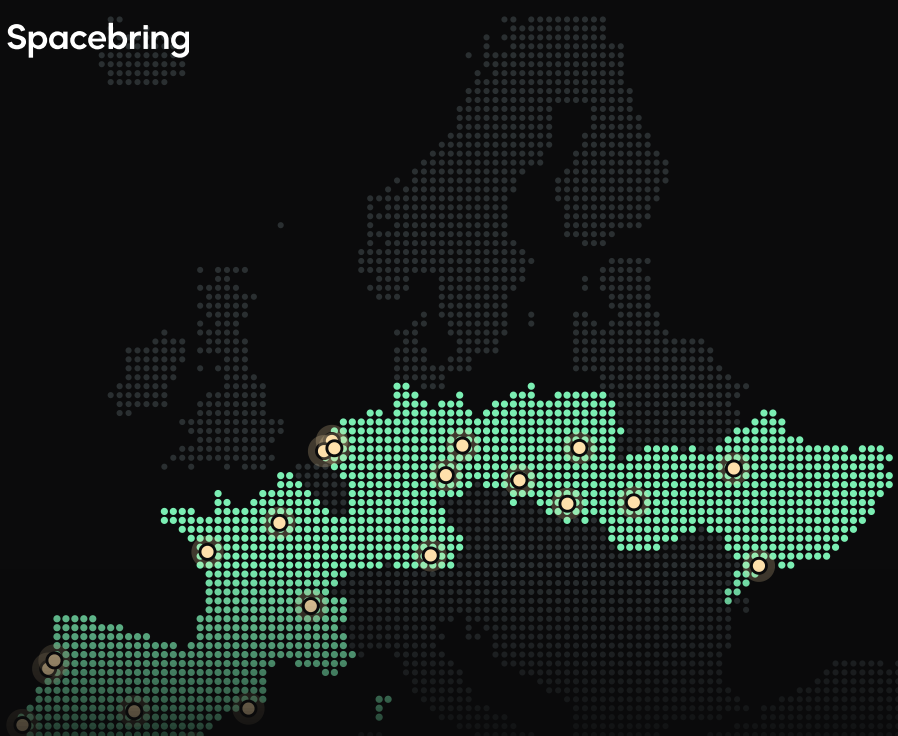




SPACEBRING RESEARCH

What European coworking spaces charge 2026

Desk, office and day-pass prices at 126 coworking spaces in 21 cities across 7 countries, and what the best-run spaces do to make buying easy

126 spaces

21 cities

7 countries

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Why we made this

Setting the price of a hot desk is one of the first decisions an operator makes, and one of the hardest to check. You know what the space across the street charges, but rarely how your prices compare with the wider market.

So we looked at 126 coworking spaces in Germany, France, Spain, the Netherlands, Poland, Portugal and Ukraine: what they charge, what their plans include and how easy they make it to buy.

AT A GLANCE

What a desk costs in Europe

€200

typical monthly hot desk

€165–271

where the middle half of hot-desk prices sit

+37%

typical fixed-desk premium over a hot desk

9.5

day passes cost about the same as a month of hot-desking

€18

typical day pass at independents
€34 at chains

28%

let a new member pay online
58% ask visitors to get in touch first

Country matters more than city size: the typical hot desk ranges from €160 in Ukraine to €249 in France, while major hubs and smaller cities are about €50 apart. And where members can book on their own, they make 75% of bookings themselves.

The European flex market in 2026

\$11.8bn

European coworking market in 2025

\$18.2bn forecast for 2031 · Mordor Intelligence

1,852

coworking spaces in Germany at the end of 2023

more than six times as many as in 2018 · BVCS

4,041

tiers-lieux (shared community workspaces) in France in 2026

up from 3,500 in 2023 · France Tiers-Lieux

3%+

of Poland's office stock is flexible workspace

up around 30% in three years · Colliers

The growth isn't limited to capitals: in Germany, the number of towns with at least one coworking space grew by more than 70% between 2020 and 2023.



The Polish flex market is being driven by a fundamental shift in how companies think about office space — from a fixed long-term commitment towards a more agile business tool. Hybrid working, changing team sizes, expansion into new markets and the need to minimise upfront investment are all increasing demand for flexible solutions. As a result, operators are moving beyond simple price-per-desk models, with pricing increasingly reflecting location, privacy, service levels, flexibility, scalability and the overall cost of occupancy.

Robert Romanowski

Senior Associate, Colliers Poland

With spaces opening well beyond the capitals, more operators need a price benchmark closer to home.

Figures on this page come from the third-party sources listed on page 23. Everything else in this report is our own research.

Who we looked at

In September 2026 we visited the websites of 126 coworking spaces in 21 cities: the largest hub, a regional city and a smaller market in each of seven countries. In October we re-checked every one.

	MAJOR HUB	REGIONAL CITY	SMALLER MARKET
Germany	Berlin	Munich	Leipzig
France	Paris	Lyon	Nantes
Spain	Madrid	Barcelona	Valencia
Netherlands	Amsterdam	Rotterdam	Utrecht
Poland	Warsaw	Kraków	Wrocław
Portugal	Lisbon	Porto	Braga
Ukraine	Kyiv	Lviv	Odesa

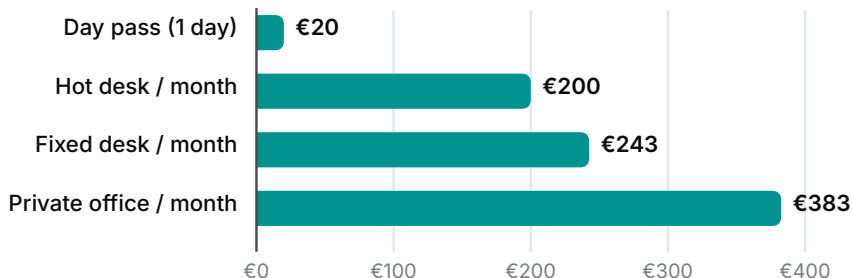
In every city we picked a mix of chain locations, independents and a specialist space such as a creative hub. We looked at what a future member sees before talking to anyone: the prices, what the plan includes and how to buy.

Prices are the standard monthly price of an unlimited hot desk, a fixed desk and an entry-level private office, plus a one-day pass, as advertised and converted to euros. Plans limited to a set number of days don't count as a hot desk. "Typical" means the middle price, so a few extreme prices don't skew the picture.

It's a hand-picked sample, not a census, so treat the figures as benchmarks rather than exact market averages.

The European price ladder

Typical price by product



At spaces that sell both, a desk of your own typically costs about a third more than a hot desk. The real jump is to a private office: the entry-level office costs almost twice as much as a hot desk.

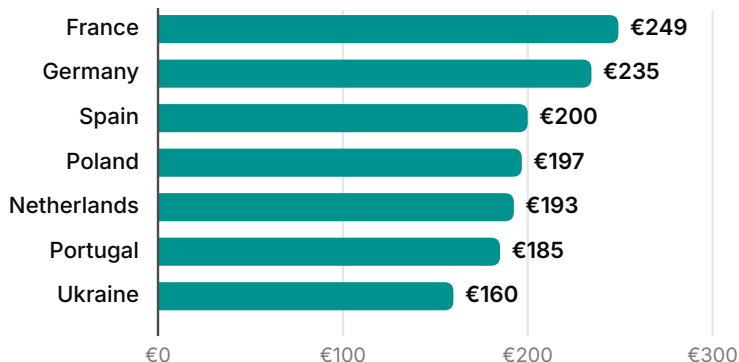
Not every space shows a hot-desk price we could compare: 43% don't. Some quote on request, some sell only part-time, daily or hourly access, and some don't list a hot desk at all. Office prices are the ones operators publish least: only about a third (37%) show one we could compare.

Monthly hot-desk prices: each dot is one space



Prices by country

Typical monthly hot desk by country



HOT DESK / MONTH	LOWER QUARTER	TYPICAL	UPPER QUARTER	DAY PASS
France	€178	€249	€278	€25
Germany	€192	€235	€342	€29
Spain	€180	€200	€259	€20
Poland	€133	€197	€271	€14
Netherlands	€169	€193	€309	€37
Portugal	€106	€185	€220	€20
Ukraine	€136	€160	€170	€15

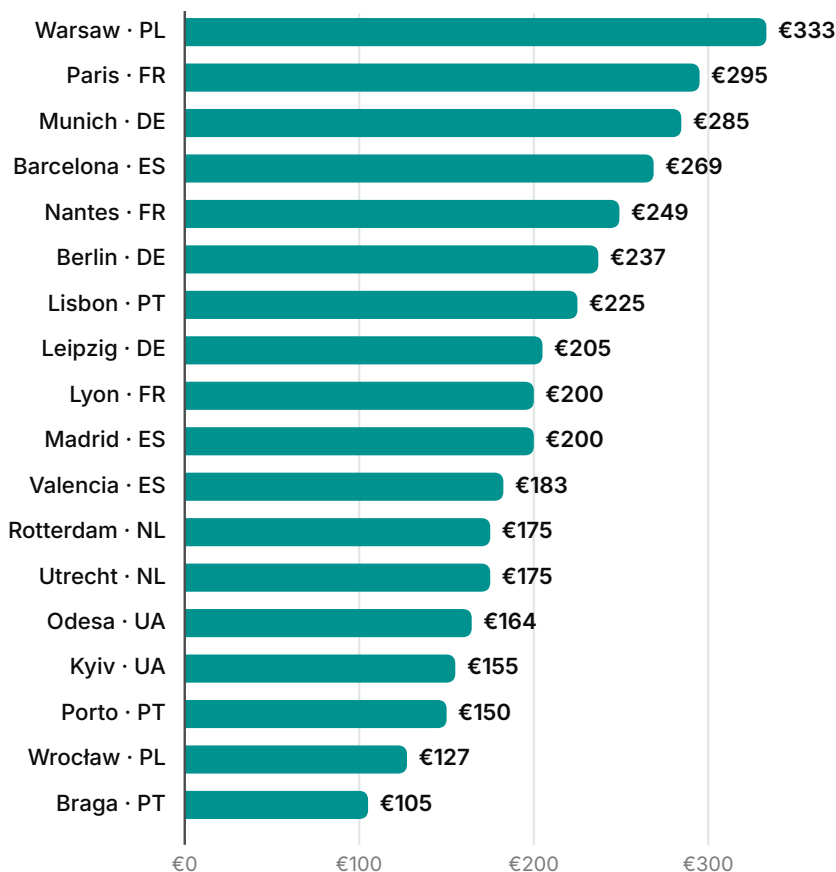
A quarter of spaces charge less than the lower-quarter price and a quarter more than the upper-quarter price.

HOW TO USE THIS

Place your hot-desk price on your country's row. Below the lower quarter is the budget end, above the upper quarter the premium end. Neither is wrong, as long as the rest of your offer tells the same story as your price.

18 cities, one desk

Typical monthly hot desk by city



We show cities with at least three comparable hot-desk prices; Amsterdam, Kraków and Lviv had fewer. With three to six prices per city, read each figure as a signal, not a market average.

City size matters less than you'd expect

It's tempting to think the capital always charges the most. The data tells a more mixed story.

TYPICAL PRICE	MAJOR HUB	REGIONAL CITY	SMALLER MARKET
Hot desk / month	€230	€205	€180
Fixed desk / month	€285	€219	€240
Private office / month	€510	€385	€375
Day pass	€23	€20	€18

Hot desks are the most even: about €50 a month separates major hubs from smaller cities, less than the gap between countries. Fixed desks and offices vary more, and major hubs charge the most for both.

Where we could compare, the capital is the most expensive city in only three of six countries. Munich (€285) sits above Berlin (€237), Barcelona (€269) above Madrid (€200), and Odesa (€164) above Kyiv (€155).

HOW TO USE THIS

Benchmark against your own city and your direct neighbours, not the capital. If you operate in a smaller city, the hot desk doesn't need a big discount; the larger differences show up in fixed desks and offices.

How the steps fit together

The absolute price is only half the picture. The other half is how your products relate to each other, because that's what can nudge a visitor from a day pass towards a membership.

+37%

typical fixed-desk premium over a hot desk

Middle half: +22% to +56%

9.5

day passes cost about the same as a month of hot-desking

Middle half: 8 to 11

Monthly hot desk vs day pass. A month of hot-desking typically costs as much as 9.5 day passes. So at most spaces, a member who comes in three days a week or more is better off on the monthly plan.

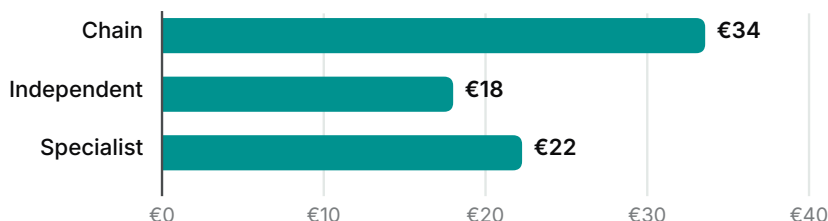
Day passes are common. About two in three spaces sell one. Half of published day passes cost between €16 and €30.

HOW TO USE THIS

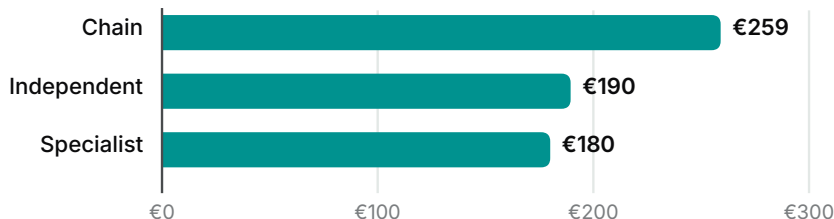
Divide your monthly hot-desk price by your day-pass price. If the result is well above 11, regular day-pass users have little reason to upgrade. If it's well below 8, your day pass may be too pricey to attract first-time visitors. Then check your fixed desk: a premium of about a third is typical.

How chains and independents price

Typical day pass by operator type



Typical monthly hot desk by operator type



The biggest gap is the day pass: €34 at chains against €18 at independents, about half the price. Monthly hot desks are closer: €259 at chains and €190 at independents. Several chain plans are network passes that work across many locations. We saw the same day-pass pattern in our UK study earlier this year.

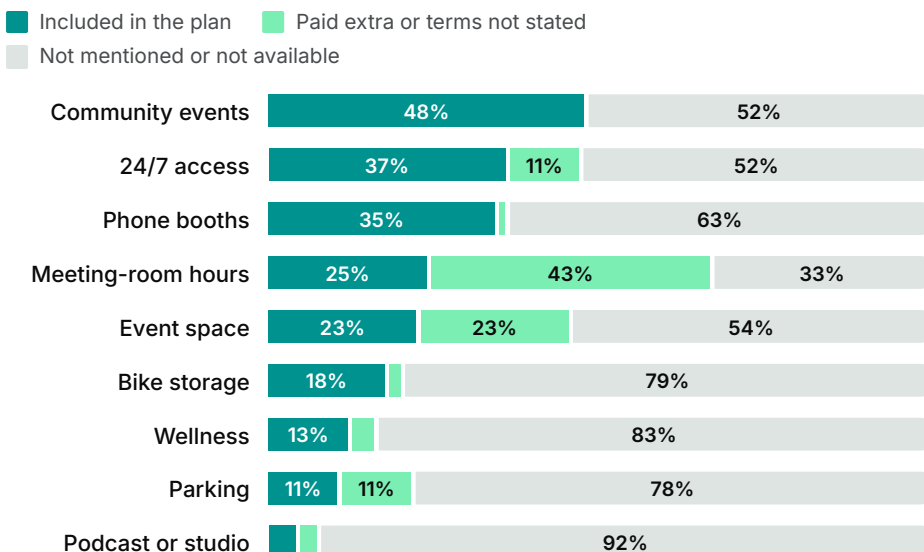
HOW TO USE THIS

If you're an independent, your day pass is already an attractive way for people to try your space. Treat it as the start of a relationship: welcome day-pass visitors properly, and follow up with a membership offer while the visit is still fresh.

What the price includes

Two spaces with the same price can offer very different value, so we also recorded what the headline plan includes: the monthly hot desk, or the entry plan where there isn't one.

What the headline plan includes (share of spaces)



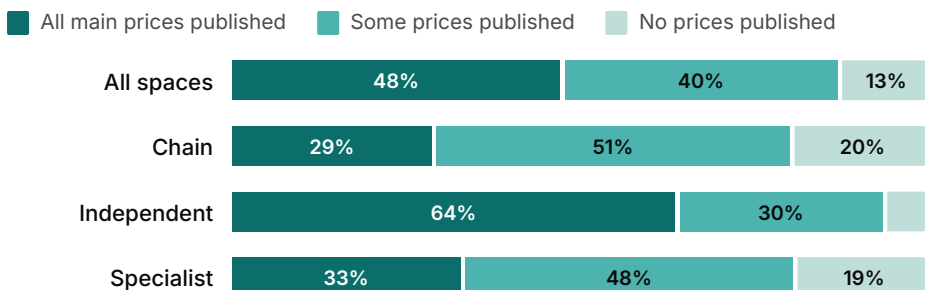
Community events are the most common inclusion (48% of plans), followed by 24/7 access (37%) and phone booths (35%). Meeting-room time is included in only a quarter of plans (25%). Many spaces don't mention some amenities at all, though they may still offer them.

HOW TO USE THIS

List what each plan includes right next to its price: access hours, meeting-room time, phone booths, events, coffee. It's the easiest way to explain why your price is what it is, and it saves answering the same questions by email.

How prices are shown

How much pricing is published, by operator type



Most spaces are open about price. 48% publish prices for all their main products and 40% publish some, typically the hot desk and day pass, with offices on request. Only 13% publish no prices at all.

Independents are the most open: 64% publish complete pricing, compared with 29% of chain locations. Chains more often price private offices and fixed desks on request.

One small detail is worth checking on your own site: whether each price says if VAT is included. 43% of spaces don't mention it, which mostly matters to freelancers and small companies comparing offers.

HOW TO USE THIS

Publish at least a “from” price for every product, including offices. A starting price helps visitors decide quickly whether you're in their budget, before they get in touch.

How members can buy

At every space, we noted the easiest way for a new customer to buy.

28%

pay online

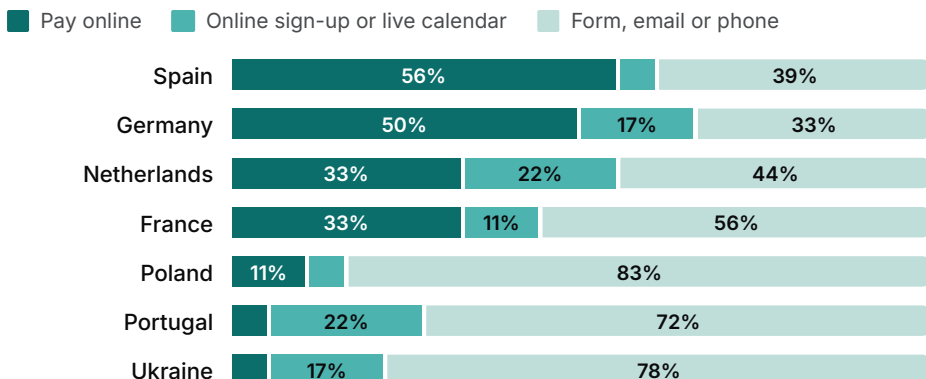
14%

 online sign-up or live
calendar

58%

form, email or phone

How a new member can buy, by country



Spain (56%) and Germany (50%) have the most spaces with online checkout. In France, Poland, Portugal and Ukraine, most spaces ask visitors to get in touch first. A contact form suits offices and custom deals; for a day pass or a monthly desk, a checkout lets people buy on the spot.

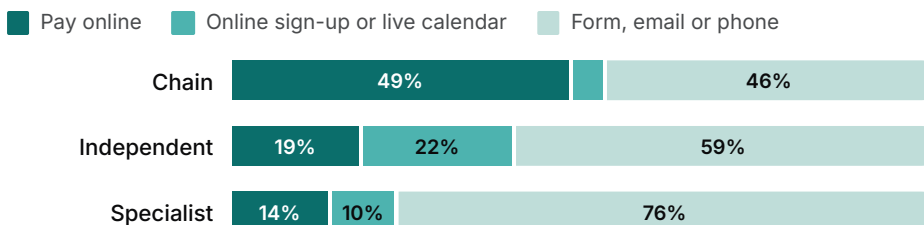


We have the policy of making it seamlessly easy for people to become betahaus members. An online check-in form helps to give them the possibility to decide today and become a member the next day. For larger teams we have tailor-made offers as well.

Madeleine Gummer v. Mohl
Co-Founder, betahaus

Chains and independents

How a new member can buy, by operator type



Chains are furthest ahead: 49% of chain locations take payment online, compared with 19% of independents and 14% of specialist spaces. Independents lead on openness instead, so for many of them the price is already on the page and the checkout is the one step left to add.



If only 30% of coworking spaces have an easy online process in place for booking a day pass — meaning they are also properly organized to welcome day users and make them feel comfortable — we can reasonably assume that the remaining 70% are missing out on an interesting revenue opportunity.

Some operators may believe that day users are not an attractive customer segment to accommodate. But in an era of hybrid working, it may be worth thinking twice.

Jean-Yves Huwart

Founder & CEO, Coworking Europe

SPACES DOING THIS WELL

betahaus Berlin: “Buy Now” buttons on its memberships and day pass open a checkout with a date picker.

La Vaca Coworking, Barcelona: a “Buy it” button on the Flex plan opens a card checkout; once they've paid, members can simply show up.

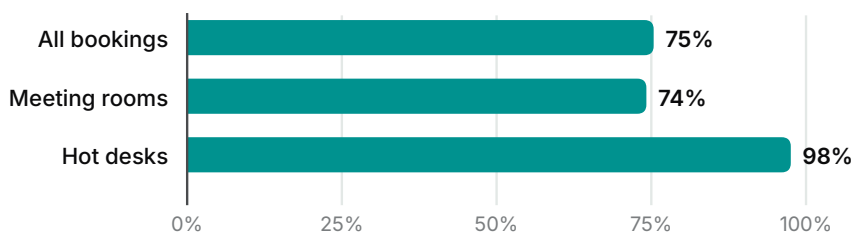
Cooffice, Odesa: takes card payments online and links to member portals for booking. Full disclosure: Cooffice runs on Spacebring.

Inside spaces powered by Spacebring

Anonymised booking data from spaces powered by Spacebring, in the same seven countries, shows what members do once they can book online.

Members make most bookings themselves

Share of bookings made by members themselves, typical location



When members can book on their own, they do most of the booking. At the typical location, **three in four bookings** are made by members, not staff, and almost every hot-desk booking.

And members don't wait for office hours. About **one in five** of their bookings (18%) is made before 9:00, after 18:00 or at the weekend.

HOW TO USE THIS

Try booking at your own space at 8 pm, from your phone, without asking anyone. If it takes more than a couple of taps, that's an easy win.

These spaces all offer online booking, so read this as self-service in practice, not a market average. "Typical" is the middle location; office hours are Monday to Friday, 9:00–18:00.

Rooms are booked at short notice

2 hours

typical time between booking a meeting room and using it

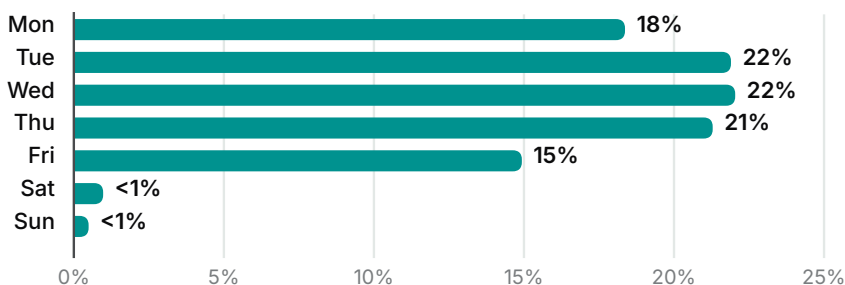
67%

of meeting-room bookings are for the same day

1 hour

typical meeting-room booking
53% are one hour or less

Meeting-room bookings by day of the week (average location)



Meeting rooms are mostly an on-the-day decision. Tuesday to Thursday are the busy days; Friday is the calmest weekday.

Hot desks are planned a little further ahead than meeting rooms. At the typical location, 43% of hot-desk bookings are made on the day, about half in the week before, and hardly any (4%) more than a week ahead. Wednesday and Thursday are the busiest days.

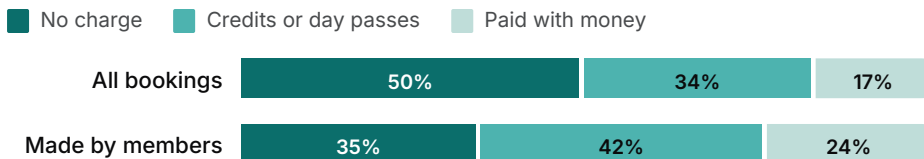
Plans change, too: about one booking in seven (14%) is cancelled.

HOW TO USE THIS

Most room bookings happen on the day, so make sure a member can book a room from their phone in under a minute. Quiet Fridays are a natural slot for trial days, tours and events.

Credits do a lot of the work

How bookings are paid (average location)



Most bookings don't involve a money payment. At the average location, 50% carry no charge at all: the team booked them as free, or the room or desk is free for anyone to book. Another 34% use credits or day passes, and 17% are paid with money.

Among bookings members make themselves, credits take the lead: together with day passes they cover **42%**, while 24% are paid with money, mostly by card. That average hides big differences: at more than half of locations card payments are rare, while at about one in five they're the main way members pay. Bookings entered by staff are more often free.

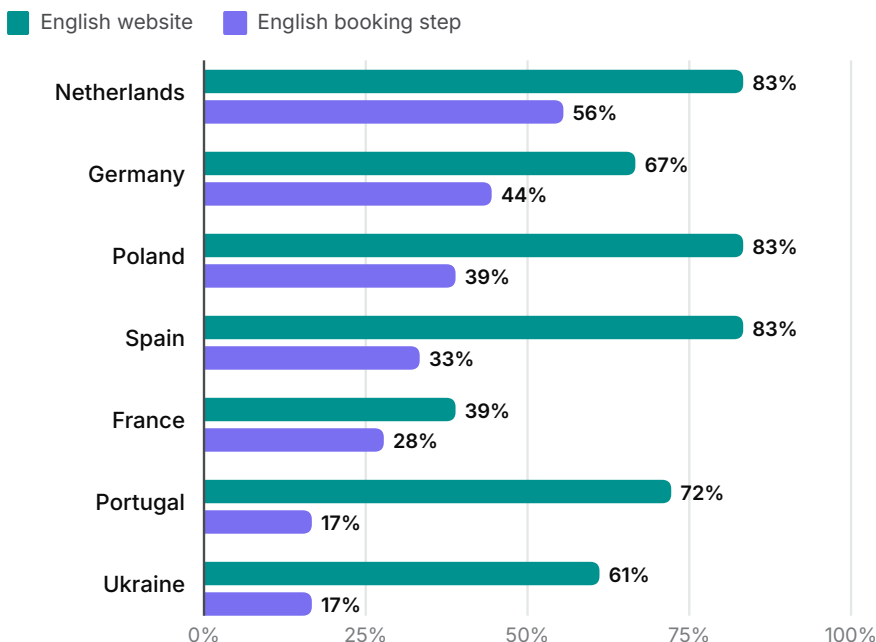
HOW TO USE THIS

Credits are the most common way members pay for their own bookings, so the credits or hours in a plan are part of your price. Keep the balance visible when members book, and they'll know what they're getting.

Credits and day passes can come with a plan or be bought separately.

English on the site and at checkout

Share of spaces with English available, by country



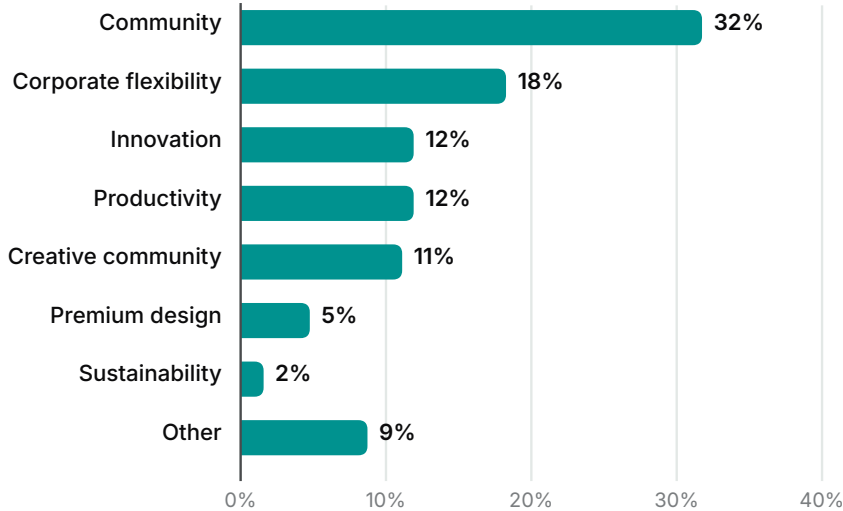
70% of spaces have an English website, but only a third (33%) clearly let visitors book in English. The Netherlands offers an English booking step most often (56% of spaces).

HOW TO USE THIS

If you serve international visitors, walk through your booking in English, from plan page to confirmation email.

Community is the main promise

Main message of the homepage (share of spaces)



About one in three spaces (32%) leads with community, and another 11% with a creative community. Corporate flexibility comes second (18%), and it's the most common message at chain locations. Almost none lead with sustainability.

The most common choice is everyone: 46% name a mixed audience. The clearest niches are freelancers (21%) and startups (17%); 8% speak directly to small and medium-sized businesses.

HOW TO USE THIS

If your price sits at the premium end of your country's range, your homepage is where you show why. A clear audience and a clear promise can make that case for you.

A quick pricing check

Five questions to ask about your own space, using the benchmarks in this snapshot.

1**Where does your hot desk sit?**

Find your country's row on page 7. Is your price in the lower quarter, the typical middle or the upper quarter, and does the rest of your offer match?

2**Is your fixed desk about a third more?**

Half of spaces charge between 22% and 56% more for a fixed desk than for a hot desk.

3**Does a month cost 8–11 day passes?**

Half of spaces fall in that range. Outside it, check whether your day pass or your membership is doing its job.

4**Does every plan say what's included?**

List access hours, meeting-room time, phone booths and events next to the price. At spaces powered by Spacebring, credits pay for more member bookings than any other method, so they're part of your price too.

5**Can a new member buy online?**

Start with the day pass and the monthly hot desk, two products people often buy without a conversation. At spaces powered by Spacebring, about one in five member bookings is made outside office hours.

If any answer surprises you, that's the place to start.

Europe and the UK

This is the European companion to our UK coworking market report, published in July 2026, and it uses the same approach so the two can be read together.

	EUROPE 2026	UK 2026
Typical monthly hot desk	€200	about £250
Pay online	28%	38%
Form, email or phone	58%	53%
Smoother booking at	Chains	Independents
Higher day-pass prices at	Chains	Chains

UK figures from Spacebring's UK coworking space market report 2026 (July 2026). Prices are shown in each report's own currency.

Across European cities of different sizes, the typical hot desk costs €180–€230 a month, a fixed desk about a third more where a space sells both, and a month about 9 to 10 day passes. The spaces that stand out pair a clear price with a clear list of what's included and an easy way to buy. Most of that happens on your website.

Sources

Market context (page 4)

Bundesverband Coworking Spaces Deutschland (BVCS), coworking statistics for Germany 2023, 28 February 2024. bundesverband-coworking.de

France Tiers-Lieux, *Recensement 2026*, 28 August 2026. observatoire.francetierslieux.fr

Colliers, Poland flex market figures reported by Coworking Europe, 18 May 2026. coworkingeurope.net

Mordor Intelligence, *Europe Coworking Spaces Market – Size, Share & Industry Analysis*, updated 9 March 2026. mordorintelligence.com

UK comparison (pages 11 and 22)

Spacebring, *UK coworking space market report 2026: pricing, trends & owner insights*, 22 July 2026. spacebring.com/blog

Our data

Spacebring European coworking market dataset: 126 spaces, collected 9–10 September 2026 and re-checked on 9 October 2026 on operators' own websites. A hot desk is the cheapest unlimited monthly plan; plans limited to a set number of days are left out. Prices change; figures describe what was published on the date checked for each space.

Spacebring platform data (pages 16–18)

Anonymised, aggregated export from the Spacebring platform, extracted 28 September 2026: live locations in the seven countries, with bookings from 1 October 2024 to the extraction date. Test networks, deleted or inactive locations, locations without a country and calendar imports are left out; cancelled bookings count only towards the cancellation share. Figures are shares and typical values across locations; each covers at least 5 locations and 3 operators, with no operator behind more than half of them. Self-service and payment figures use bookings made from November 2025, leaving out June 2026, when who made a booking was not reliably recorded. “No charge” means booked as free by staff, a resource anyone can book for free, or a 100% discount.

Notes

Medians and percentiles are of prices as advertised and are rounded to the nearest euro. Percentages are of all 126 spaces unless stated otherwise and may not add to 100 because of rounding. Prices flagged in the dataset as “from” prices, campaign prices or network passes are included as advertised. Exchange rates: European Central Bank and National Bank of Ukraine, 8 September 2026.



Let members book and pay on your website.

Spacebring helps coworking space operators deliver superior member service through automated operations, built-in AI and an admin mobile app. Members sign up, book, pay and get support in one branded experience, and operators spend less time on admin across every location.



SCAN TO BOOK A DEMO

See how Spacebring can help your space sell day passes, desks and rooms online.

ABOUT THIS RESEARCH

Research by Spacebring, based on the websites of 126 coworking spaces and anonymised data from the Spacebring platform.