# Scotland's Flexible Workspace Landscape in 2026: Market Structure, Regional Distribution and Operator Characteristics

**Steven Carr**

## Abstract

The flexible workspace sector has become an increasingly important component of Scotland's commercial property market, driven by changing workplace preferences, hybrid working models and growing demand for operational flexibility among businesses. While much of the discussion surrounding flexible workspace has focused on major metropolitan centres and international operators, Scotland's market presents a more diverse and geographically distributed ecosystem.

This paper examines Scotland's flexible workspace landscape, analysing the distribution, characteristics and composition of workspace operators across the country. Drawing upon original research and industry analysis, the study identifies a market characterised by a significant number of independent operators, community-led initiatives and regional workspace providers. The findings demonstrate the increasing importance of flexible workspace as economic infrastructure supporting entrepreneurship, innovation, remote work, business growth and regional development.

**Keywords:** Flexible Workspace, Coworking, Serviced Offices, Scotland, Commercial Property, Hybrid Working, Business Centres, Flexible Offices

# 1. Introduction

The nature of work has undergone substantial transformation over the past decade. Advances in technology, changing workforce expectations and the emergence of hybrid working models have accelerated demand for flexible workspace solutions across the United Kingdom and Ireland.

Flexible workspace encompasses a broad range of accommodation types, including coworking spaces, serviced offices, managed offices, business centres, innovation hubs and creative studios.

Unlike traditional leased office space, these environments provide organisations with greater agility, shorter commitments and access to shared services and facilities.

While London has historically attracted much of the attention within industry reports and commercial property research, Scotland's flexible workspace market has developed into a diverse and mature ecosystem. Operators now serve businesses ranging from sole traders and start-ups to scale-up companies, public sector organisations and large enterprises.

This paper seeks to provide an overview of Scotland's flexible workspace landscape, exploring how the sector has evolved and examining the characteristics that define the market today.

# 2. Defining Flexible Workspace

For the purposes of this research, flexible workspace refers to commercial accommodation that allows businesses to occupy space on flexible terms without the long-term commitments associated with traditional commercial leases.

This includes:

- Coworking spaces
- Serviced offices
- Managed offices
- Business centres
- Innovation hubs
- Creative studios
- Enterprise centres
- Flexible business units

Workspace providers typically combine physical accommodation with additional services, including reception support, meeting facilities, networking opportunities, high-speed connectivity and business support.

The continued growth of flexible workspace reflects broader changes in how organisations approach property, workforce management and business growth.

# 3. Methodology

This paper is based upon original research undertaken by the author during 2026, combined with more than fourteen years of operational experience within the flexible workspace sector.

Data was compiled through analysis of workspace provider websites, publicly available business information, industry directories and workspace networks including the **Flexible Space Association** and **Connected Hubs Scotland**. Information relating to coworking trends, market observations and workspace availability was also reviewed using industry resources such as **CoworkingCafe**. [cubowork.com], [ubcuk.com]

The research focused on identifying active flexible workspace locations operating throughout Scotland and classifying them according to geography, operator type and workspace format.

While every effort has been made to ensure accuracy, the rapidly evolving nature of the sector means that workspace inventories continue to change as operators expand, relocate or launch new facilities.

# 4. Scotland's Flexible Workspace Market

The Scottish flexible workspace sector has evolved considerably over the past decade. Once largely concentrated within major cities, workspace provision is now distributed across a diverse range of urban, rural and island communities.

This growth has been supported by several contributing factors, including:

- Increased adoption of hybrid working
- Growth in entrepreneurship and self-employment
- Demand for flexible property solutions
- Public investment in innovation and enterprise infrastructure
- Improvements in digital connectivity
- Changing workforce expectations

The result is a market that is no longer exclusively focused on city-centre coworking but instead encompasses a broad range of workspace solutions designed to support different business requirements.

# 5. Regional Distribution

Although Glasgow and Edinburgh remain Scotland's largest flexible workspace markets, the sector has experienced significant growth throughout regional Scotland.

Locations such as Dundee, Aberdeen, Perth, Inverness, Stirling and Ayr now support a growing number of coworking spaces, serviced offices and business centres. At the same time, community-led workspace projects and regional hubs have emerged in smaller towns and rural areas, expanding access to professional workspace beyond Scotland's main cities.

This geographic diversity reflects the increasing importance of workspace accessibility, reducing the need for lengthy commutes while supporting local economic activity and business formation.

The expansion of regional workspace infrastructure has also created opportunities for entrepreneurs, remote workers and small businesses to access facilities previously concentrated within larger urban centres.

# 6. Independent Operators and Community-Led Growth

One of the defining characteristics of Scotland's flexible workspace market is the prominence of independent operators.

While international brands maintain a presence within key city locations, a significant proportion of Scotland's workspace stock is operated by local businesses, social enterprises, community organisations and regional workspace providers.

Many operators have developed offerings specifically tailored to the needs of their local economy. Some focus on technology businesses and start-ups, while others support creative industries, rural enterprises, social enterprises or growing SMEs.

The contribution of community-focused initiatives has been especially notable. Networks such as **Connected Hubs Scotland** continue to support collaboration between workspace operators and encourage the development of local ecosystems that strengthen regional economic resilience.

# 7. The Evolution of Workspace Demand

Occupier expectations have changed significantly since the emergence of modern coworking environments.

Today's workspace users increasingly prioritise:

- Flexible contracts
- Business-grade WiFi
- Meeting rooms
- Community and networking opportunities
- 24/7 access
- Sustainable buildings
- High-quality customer experience
- Location convenience

The workspace sector has responded by evolving from a property-based model towards a service-led approach in which customer experience, hospitality and community management play increasingly important roles.

This transition has blurred the traditional boundaries between office space, hospitality and business support services.

# 8. Technology and the Future of Workspace Discovery

Technology is increasingly influencing how occupiers identify and evaluate workspace opportunities.

The growth of online directories, digital marketplaces and AI-assisted search tools has made it easier for businesses to compare locations, facilities and workspace options before engaging directly with operators.

Recognising the challenges faced by occupiers searching for workspace, the author developed **Your Flex Expert**, a workspace discovery platform designed to help businesses find offices, coworking spaces, studios and flexible business units throughout the UK and Ireland.

The platform draws upon practical operational experience gained through managing flexible workspaces and supporting customers over a fourteen-year period, helping businesses navigate an increasingly fragmented marketplace.

# 9. Industry Perspective

Reflecting on Scotland's evolving workspace ecosystem, **Helen Godliman, Chief Executive of the Flexible Space Association**, commented:

"Scotland has developed a remarkably diverse flexible workspace ecosystem, with independent operators, community hubs and commercial providers all playing an important role in supporting businesses. The growth of flexible workspace demonstrates how organisations increasingly value agility, community and access to high-quality professional environments."

This observation reflects wider industry recognition of flexible workspace as an essential component of modern business infrastructure.

# 10. Conclusion

Scotland's flexible workspace sector represents a dynamic and evolving component of the country's commercial property landscape.

While major cities continue to play an important role, growth across regional locations demonstrates that flexible workspace has become far more than an urban office solution. It has developed into a nationwide network supporting entrepreneurship, innovation, remote work and economic development.

The market's diversity, characterised by independent operators, community-led initiatives and specialist providers, creates a unique ecosystem that differs significantly from many larger international markets.

As hybrid working patterns become increasingly embedded and businesses continue to prioritise flexibility, Scotland's flexible workspace sector appears well positioned to support the future needs of organisations across the country.

## About the Author

Steven Carr is an independent consultant, researcher and commentator specialising in flexible workspace, coworking and commercial property across the UK and Ireland. He is the founder of **Your Flex Expert**, a workspace discovery platform helping businesses identify offices, coworking spaces, studios and flexible business units. His research focuses on workspace innovation, customer experience, occupancy trends and the future of work.