



CEE

YEAR 10, ISSUE 8
SPECIAL ISSUE

LEGAL MATTERS

CEE BY THE NUMBERS



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FOREWORD AND DEFINITIONS

By Radu Cotarcea

The biennial *CEE by the Numbers* report – a compilation and presentation of hard data about the lawyers at leading law firms of Central and Eastern Europe – is a source of real pride at CEE Legal Matters. This report is our fourth, following the first in April 2014 (published as part of our special *Glass CEELing* issue), and the second, third, and fourth published as standalone reports in 2017, 2019, and 2021. Like its predecessors, it includes information not only about the size and gender breakdown of the leading law firms in the region but also allows readers to track and measure the growth (or decline) of those numbers over previous years.

We are grateful to those firms that took the time to respond to our inquiries on the matter, and we hope they – and everyone else – will give us their feedback on the issue. We look forward to receiving (and publishing, if possible) that feedback over the months to come.

Methodology

CEE Legal Matters covers the legal markets of Albania, Austria, Bosnia and Herzegovina, Bulgaria, Croatia, the Czech Republic, Estonia, Greece, Hungary, Kosovo, Latvia, Lithuania, Moldova, Montenegro, North Macedonia, Poland, Romania, Serbia, Slovakia, Slovenia, Turkiye, and Ukraine. Due to the ongoing war in Ukraine, we have an embargo on covering the Russian and Belarussian markets, with those two countries being stricken from the data sets used from the past as well. The data in this report was gathered between August 1 and September 31, 2023, from the websites of 733 law firms (with a total of 1,162 offices) ranked by *Chambers & Partners* and *Legal 500* in any one practice area in each of those 22 countries (excepting those law firms which do not distinguish between partners and associates on their websites or which do not list their associates), and from 57 law firms in the region that were not ranked but are part

of regional networks that include ranked firms. Each firm for which information was gathered was also contacted and invited to confirm or update the data.

Definitions

For the purpose of the survey, “lawyer” means all lawyers, at all levels working as full-time fee earners (i.e., junior associate, associate, senior associate, (of) counsel, attorney, partner, etc.). “Associate” means all lawyers who are not partners.

“Regional” law firms are those that are headquartered in CEE or elsewhere in Continental Europe (e.g., Germany) and which have offices in at least three CEE countries. Firms with offices in only two neighboring jurisdictions (such as those with offices only in the Czech Republic and Slovakia, or in Serbia and Montenegro) were categorized as “Domestic.”

“International” law firms are those with headquarters outside of Continental Europe but with at least one office in the region.

“Networks” were considered only if they present themselves as an exclusive alliance (e.g., SEE Legal was considered, while Lex Mundi was not).

For the sake of simplicity and consistency, for the purposes of this report, the law firms affiliated with the Big 4 accounting firms (i.e., KPMG, EY, Deloitte, and PwC) or with international firms that are branded differently to satisfy local bar regulations were treated as part of those organizations. For example, Reff & Associates, which is affiliated with Deloitte Legal in Romania, was treated as Deloitte Legal, while Balcioglu Selcuk Ardiyok Keki Attorney Partnership, the Turkish firm associated with Dentons, was treated as Dentons. ■



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If you like what you read in these pages (or even if you don't), we really do want to hear from you. Please send any comments, criticisms, questions, or ideas to us at: press@ceelm.com

LEGAL MARKET SIZE





NUMBER OF LAW FIRMS

Which CEE country has the most law firms ranked by *Chambers & Partners* or *Legal 500* (or both)?

In 2021, Turkiye was at the top of the table with 134 firms ranked, followed by Russia with 117. While the latter was not analyzed in this report, the former saw a sharp decrease in the number of ranked firms – the sharpest, in fact, with 35 fewer ranked firms in the country compared to 2021.

In 2023, Poland took the lead, adding 43 additional ranked offices since 2021.

A total of seven jurisdictions have over 50 ranked firms in 2023, nine in 2021, and 11 in 2019, with Hungary, Bulgaria, and Slovakia (albeit just) dropping below that threshold in the four years analyzed.

Country	Number of Ranked Firms
Poland	131
Austria	101
Ukraine	99
Turkiye	99
Greece	77
Romania	65
Czech Republic	61
Slovakia	50
Croatia	48
Bulgaria	44
Hungary	43
Serbia	43
Lithuania	29
Estonia	25
Latvia	22
Slovenia	22
Bosnia and Herzegovina	14
Albania	14
Montenegro	13
North Macedonia	13
Moldova	10
Kosovo	7

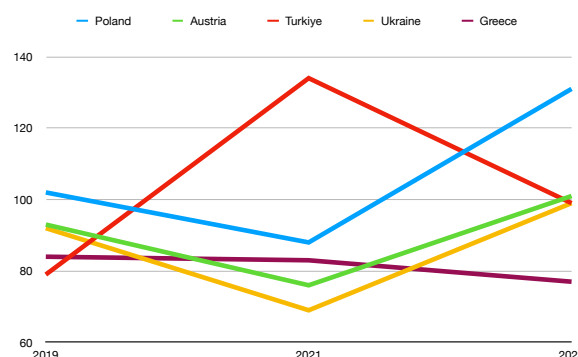


The number of firms ranked by *Chambers & Partners* and *Legal 500* has expanded significantly across the entire region over the past couple of years, in contrast with the findings of the *2021 CEE by the Numbers* report, according to which the number of ranked firms had decreased in almost every country between 2019 and 2021.

17 of the 22 analyzed markets have more ranked firms in 2023 than they did in 2021. 14 of them have compensated for the decrease in numbers between 2019 and 2021 and now have more ranked firms than they did in 2019.

Country	Number of Ranked Firms 2023	Number of Ranked Firms 2021	Number of Ranked Firms 2019	Evolution Since 2021	Evolution Since 2019
Albania	14	11	16	+3	-2
Austria	101	76	93	+25	+8
Bosnia and Herzegovina	14	10	13	+4	+1
Bulgaria	44	39	51	+5	-7
Croatia	48	33	46	+15	+2
Czech Republic	61	52	65	+9	-4
Estonia	25	20	29	+5	-4
Greece	77	83	84	-6	-7
Hungary	43	39	43	+4	0
Kosovo	7	6	3	+1	+4
Latvia	22	15	17	+7	+5
Lithuania	29	22	28	+7	+1
Moldova	10	8	8	+2	+2
Montenegro	13	11	10	+2	+3
North Macedonia	13	12	16	+1	-3
Poland	131	88	102	+43	+29
Romania	65	71	63	-6	+2
Serbia	43	42	33	+1	+10
Slovakia	50	54	46	-4	+4
Slovenia	22	25	23	-3	-1
Turkiye	99	134	79	-35	+20
Ukraine	99	69	92	+30	+7

Of the four countries nearing or past 100 ranked firms, Turkiye deviates from the trends across the past four years. In the *2021 CEE by the Numbers* report, Turkiye had the highest growth in terms of the number of ranked firms. In 2023, it is the country with the highest decrease in that number. Poland, Austria, and Ukraine registered a drop between 2021 and 2023 and bounced back. Greece, which completed the Top 5 countries with most law firms had a steady small decrease over both data points.



NUMBER OF LAWYERS

Same as in the 2019 and 2021 *CEE by the Numbers* reports, Poland leads the way in terms of the number of lawyers working at ranked firms, with a total headcount of 5,291. Austria jumped into the second spot with a total of 2,538 lawyers. Turkiye follows in third with 2,071.

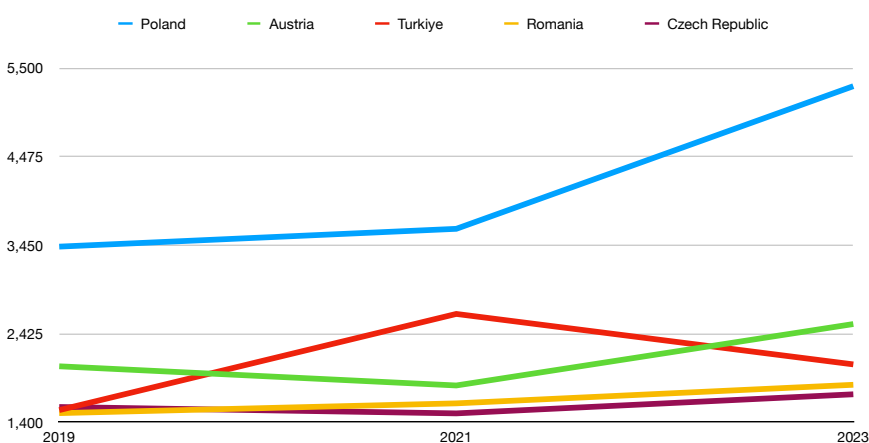
Four jurisdictions – Turkiye, Montenegro, Albania, and Moldova – have fewer lawyers working in total at ranked firms in 2023 compared to 2021. Comparing 2023 to 2019, five markets have a smaller total headcount (in order of decrease): Ukraine, Bulgaria, Slovenia, Bosnia and Herzegovina, and Montenegro.

Poland, Austria, Greece, Lithuania, and the Czech Republic, in that order, registered the highest increases in the total number of lawyers at ranked firms.

While Turkiye saw the highest decrease in the last couple of years (584 lawyers fewer at ranked firms in the country), it still has 529 more lawyers working at ranked firms in total compared to 2019.

Poland, which led the table in both 2019 and 2021 saw the highest increase with 1,651 more lawyers working at ranked firms in 2023 compared to 2021 – 1,857 more when compared to 2019.

Country	Number of Lawyers
Poland	5,291
Austria	2,538
Turkiye	2,071
Romania	1,835
Czech Republic	1,725
Greece	1,676
Ukraine	1,382
Hungary	1,021
Lithuania	874
Serbia	769
Slovakia	753
Bulgaria	636
Estonia	573
Croatia	477
Latvia	429
Slovenia	312
North Macedonia	120
Albania	100
Bosnia and Herzegovina	89
Moldova	73
Montenegro	55
Kosovo	39





Country	Total Number of Lawyers 2023	Total Number of Lawyers 2021	Total Number of Lawyers 2019	Evolution Since 2021	Evolution Since 2019
Poland	5,291	3,640	3,434	+1,651	+1,857
Austria	2,538	1,827	2,049	+711	+489
Greece	1,676	1,342	1,268	+334	+408
Lithuania	874	635	700	+239	+174
Czech Republic	1,725	1,504	1,578	+221	+147
Romania	1,835	1,620	1,507	+215	+328
Estonia	573	415	567	+158	+6
Hungary	1,021	893	887	+128	+134
Croatia	477	351	390	+126	+87
Latvia	429	310	323	+119	+106
Serbia	769	721	675	+48	+94
Slovakia	753	709	581	+44	+172
Ukraine	1,382	1,338	1,579	+44	-197
Slovenia	312	298	323	+14	-11
Bulgaria	636	623	690	+13	-54
Bosnia and Herzegovina	89	80	98	+9	-9
North Macedonia	120	114	111	+6	+9
Kosovo	39	38	7	+1	+32
Moldova	73	75	56	-2	+17
Albania	100	105	93	-5	+7
Montenegro	55	76	56	-21	-1
Türkiye	2,071	2,655	1,542	-584	+529

Countries ranked by the increase in the total number of lawyers between 2021 and 2023.

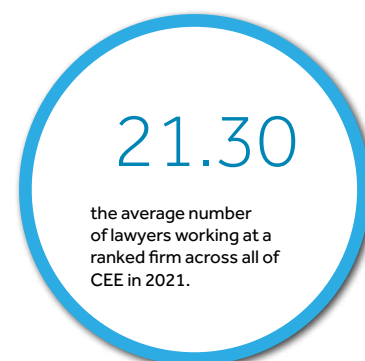
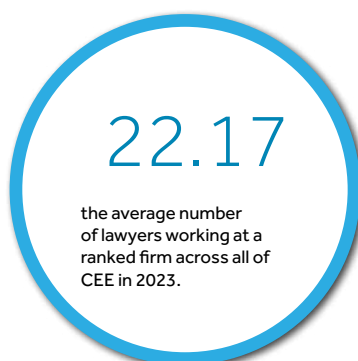
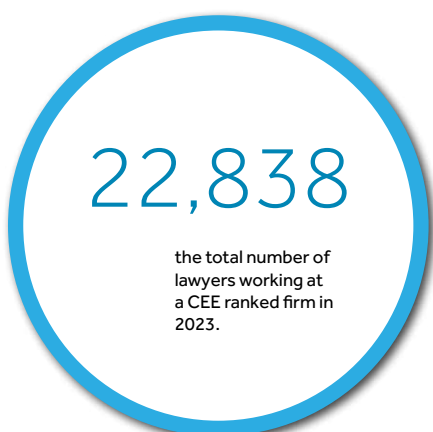
AVERAGE SIZE OF LAW FIRMS

The top three markets in 2023 remain Poland, Lithuania, and the Czech Republic when it comes to the average size of ranked law firms. However, Lithuania moved up to take the second spot, previously held by the Czech Republic. Poland keeps its top spot but its average headcount of 40.39 is slightly lower than in 2021 (41.36).

Romania (now with 28.23) moved up to the fourth spot taking Austria's place despite the latter also increasing from 24.04 to 25.13.

Of the surveyed 22 markets, seven have an average lower than 10, six have an average between 10 and 20, and nine have an average of over 20 lawyers working at ranked firms.

Country	Average Number of Lawyers
Poland	40.39
Lithuania	30.14
Czech Republic	28.28
Romania	28.23
Austria	25.13
Hungary	23.74
Estonia	22.92
Greece	21.77
Turkiye	20.92
Latvia	19.5
Serbia	17.88
Slovakia	15.06
Bulgaria	14.45
Slovenia	14.18
Ukraine	13.96
Croatia	9.94
North Macedonia	9.23
Moldova	7.3
Albania	7.14
Bosnia and Herzegovina	6.36
Kosovo	5.57
Montenegro	4.23



CHANGING TEAM SIZES

The 2021 *CEE by the Numbers* report found that all but two jurisdictions (Serbia and Slovenia) increased the average number of lawyers at ranked firms over the previous two years, a reversal from the 2019 results where the average size of ranked law firms had decreased across most of CEE, with only two jurisdictions (Turkiye and Serbia) showing an uptick between 2017 and 2019.

In 2023, the trend seems to have circled back to a decrease in average headcounts, albeit more moderate than in the 2019 results. 12 of the 22 analyzed jurisdictions saw a decrease in the average number of lawyers at ranked firms in

2023 compared to 2021. Of the remaining 10 that did see an increase, Greece and Romania saw the highest jump, with 5.6 additional lawyers on average per ranked firm and 5.41, respectively. On the opposite side of the spectrum, Ukraine's average number decreased by 5.43.

While more jurisdictions registered a decrease in their averages than an increase in 2023 compared to 2021, the averages still are higher in most countries compared to 2019. Only Bosnia and Herzegovina, Montenegro, Serbia, and Ukraine have fewer lawyers, on average, working at a ranked firm.

Country	Average Number of Lawyers at Ranked Firms in 2023	Average Number of Lawyers at Ranked Firms in 2021	Average Number of Lawyers at Ranked Firms in 2019	Evolution Since 2021	Evolution Since 2019
Greece	21.77	16.17	15.1	+5.6	+6.67
Romania	28.23	22.82	23.92	+5.41	+4.31
Slovenia	14.18	11.92	14.04	+2.26	+0.14
Estonia	22.92	20.75	19.55	+2.17	+3.37
Slovakia	15.06	13.13	12.63	+1.93	+2.43
Lithuania	30.14	28.86	25	+1.27	+5.14
Turkiye	20.92	19.81	19.52	+1.11	+1.4
Austria	25.13	24.04	22.03	+1.09	+3.1
Hungary	23.74	22.9	20.63	+0.85	+3.12
Serbia	17.88	17.17	20.45	+0.72	-2.57
North Macedonia	9.23	9.5	6.94	-0.27	+2.29
Czech Republic	28.28	28.92	24.28	-0.64	+4
Croatia	9.94	10.64	8.48	-0.7	+1.46
Kosovo	5.57	6.33	2.33	-0.76	+3.24
Poland	40.39	41.36	33.67	-0.97	+6.72
Latvia	19.5	20.67	19	-1.17	+0.5
Bulgaria	14.45	15.97	13.53	-1.52	+0.93
Bosnia and Herzegovina	6.36	8	7.54	-1.64	-1.18
Moldova	7.3	9.38	7	-2.08	+0.3
Albania	7.14	9.55	5.81	-2.4	+1.33
Montenegro	4.23	6.91	5.6	-2.68	-1.37
Ukraine	13.96	19.39	17.16	-5.43	-3.2

Countries ranked by the increase in the average number of lawyers working at ranked firms between 2021 and 2023.

SIZE VS NUMBER OF FIRMS

In the 2019 CEE by the Numbers report, looking in parallel at the change in the number of ranked firms and their average headcount, it would have either appeared that firms across CEE were streamlining or, as indicated to be more likely, it reflected, “at least in part, a splintering of the markets, with spin-offs and new challengers able to challenge more established firms for dominance.” Looking at the same two data sets in 2021, a story of market consolidation could be read with most jurisdictions having fewer small firms ranked, thus explaining the trends of fewer ranked firms while the average number of lawyers increases.

The 2023 numbers highlight Greece, Romania, Slovakia, Slo-

venia, and Turkiye as the countries that show signs of market consolidation, with six fewer ranked firms in both Greece and Romania but an average number of lawyers increasing by 5.6 and 5.41 in Greece and Romania, respectively.

12 markets registered an increase in the number of ranked law firms and a decrease in the average number of lawyers working at them, which would seem to indicate a splintering of those markets.

Austria is a notable outlier here since it saw the addition of 25 ranked firms while also registering an increase in the average number of lawyers working at ranked firms by 1.09.

Country	Change in the Number of Ranked Law Firms (2021 to 2023)	Change in the Average Number of Lawyers at Ranked Firms (2021 to 2023)
Albania	+3	-2.4
Austria	+25	+1.09
Bosnia and Herzegovina	+4	-1.64
Bulgaria	+5	-1.52
Croatia	+15	-0.7
Czech Republic	+9	-0.64
Estonia	+5	+2.17
Greece	-6	+5.6
Hungary	+4	+0.85
Kosovo	+1	-0.76
Latvia	+7	-1.17
Lithuania	+7	+1.27
Moldova	+2	-2.08
Montenegro	+2	-2.68
North Macedonia	+1	-0.27
Poland	+43	-0.97
Romania	-6	+5.41
Serbia	+1	+0.72
Slovakia	-4	+1.93
Slovenia	-3	+2.26
Turkiye	-35	+1.11
Ukraine	+30	-5.43

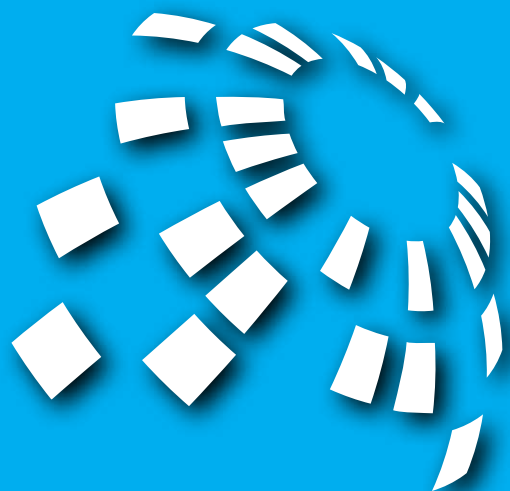


Of course, false dichotomies should be avoided and the numbers for Austria for 2023 compared to 2021 highlight that it is not just a matter of either market consolidation or splintering.

For example, an increase in both the total number of ranked firms in a country and an increase in the average number of lawyers working at them might reflect pure market growth. Alternatively, it might simply be that the market has stayed the same but the ranking directories used grew more generous in their inclusiveness.

In fact, of the 22 analyzed jurisdictions, five increased both in terms of the number of ranked firms and average size between 2021 and 2023, and 11 did so between 2019 and 2023.

Country	Change in the Number of Ranked Law Firms (2019 to 2023)	Change in the Average Number of Lawyers at Ranked Firms (2019 to 2023)
Albania	-2	+ 1.33
Austria	+8	+ 3.1
Bosnia and Herzegovina	+ 1	-1.18
Bulgaria	-7	+ 0.93
Croatia	2	+ 1.46
Czech Republic	-4	+ 4
Estonia	-4	+ 3.37
Greece	-7	+ 6.67
Hungary	0	+ 3.12
Kosovo	+ 4	+ 3.24
Latvia	+ 5	+ 0.5
Lithuania	+ 1	+ 5.14
Moldova	+ 2	+ 0.3
Montenegro	+ 3	-1.37
North Macedonia	-3	+ 2.29
Poland	+ 29	+ 6.72
Romania	+ 2	+ 4.31
Serbia	+ 10	-2.57
Slovakia	+ 4	+ 2.43
Slovenia	-1	+ 0.14
Turkiye	+ 20	+ 1.4
Ukraine	+ 7	-3.2



LEGAL MARKET SATURATION





NUMBER OF FIRMS / GDP

One method of assessing the level of saturation in each market is to compare each country’s gross domestic product (as reported by the World Bank for 2022) to the number of ranked firms in that specific market.

When seen through this lens, same as in the 2021 and 2019 *CEE by the Numbers* report, Montenegro appears to be the most crowded market, with Turkiye being the least crowded.

Country	GDP in USD million (Source: World Bank 2022)	2023 Ratio: GDP / Number of Ranked Firms
Turkiye	905,987.82	9,151.39
Poland	688,176.61	5,253.26
Czech Republic	290,923.53	4,769.24
Austria	471,400.07	4,667.33
Romania	301,261.58	4,634.79
Hungary	178,788.57	4,157.87
Greece	219,065.87	2,845.01
Slovenia	62,117.77	2,823.54
Lithuania	70,334.30	2,425.32
Slovakia	115,468.80	2,309.38
Bulgaria	89,040.40	2,023.65
Latvia	41,153.91	1,870.63
Bosnia and Herzegovina	24,527.51	1,751.97
Ukraine	160,502.74	1,621.24
Estonia	38,100.81	1,524.03
Croatia	70,964.61	1,478.43
Serbia	63,501.75	1,476.78
Moldova	14,420.95	1,442.10
Albania	18,882.10	1,348.72
Kosovo	9,429.16	1,347.02
North Macedonia	13,563.13	1,043.32
Montenegro	6,095.98	468.92

Compared to the 2021 report, Turkiye jumped from third place back to the top spot it held in 2019 – “powered” by it registering 35 fewer ranked firms in 2023 than in 2021 while also showing a considerable increase in its GDP. The Czech Republic overtook Austria for the first time, primarily as a result of the latter’s addition of 25 firms.

In the 2021 report, CEE markets seemed to be less crowded overall compared to 2019, with 16 of the 22 jurisdictions increasing their ratio between 2019 and 2021, while Turkiye,

Kosovo, Greece, Slovenia, Serbia, and Slovakia had a lower ratio than in 2019. In contrast, markets seem more saturated in 2023 with 13 jurisdictions of the 22 jurisdictions decreasing the GDP to ranked firm ratio.

Since 2021, Turkiye had the highest ratio increase, while Poland saw the highest decrease. When compared to the 2019 ratios, the Czech Republic increased its ratio the most, while Kosovo recorded the highest decrease.



Country	GDP in USD million (2020)	2021 Ratio: GDP / Number of Ranked Firms
Poland	594,164.69	6,829.48
Austria	430,947.39	5,670.36
Turkiye	720,101.21	5,373.89
Czech Republic	245,349.49	4,718.26
Hungary	155,012.93	3,974.69
Romania	248,715.55	3,503.04
Lithuania	55,887.27	2,540.33
Greece	189,410.11	2,282.05
Ukraine	155,582.01	2,254.81
Latvia	33,505.19	2,233.68
Slovenia	53,589.61	2,143.58
Bosnia and Herzegovina	19,788.42	1,978.84
Slovakia	104,574.15	1,936.56
Bulgaria	69,105.1	1,771.93
Croatia	55,966.58	1,695.96
Estonia	30,650.29	1,532.51
Moldova	11,914.04	1,489.26
Albania	14,799.62	1,345.42
Kosovo	7,611.4	1,268.57
Serbia	52,960.13	1,260.96
North Macedonia	12,266.95	1,022.25
Montenegro	4,778.58	434.42

Country	GDP in USD million (2018)	2019 Ratio: GDP / Number of Ranked Firms
Turkiye	766,509	9,463.07
Poland	585,782	5,374.15
Austria	455,736	4,747.25
Czech Republic	244,105	3,589.78
Romania	239,552	3,373.97
Hungary	155,703	3,053.00
Greece	218,031	2,565.07
Slovenia	54,235	2,259.79
Slovakia	106,472	2,008.91
Lithuania	53,251	1,717.77
Kosovo	7,900	1,580.00
Latvia	34,849	1,452.04
Ukraine	130,832	1,377.18
Serbia	50,508	1,329.16
Bosnia and Herzegovina	19,781	1,318.73
Croatia	60,805	1,240.92
Bulgaria	65,132	1,142.67
Moldova	11,309	1,130.90
Estonia	30,284	917.70
Albania	15,058	752.90
North Macedonia	12,672	603.43
Montenegro	5,452	419.38

GDP / NUMBER OF LAWYERS

Turkiye is also the least crowded when comparing the number of lawyers at ranked firms against its GDP, with a GDP-to-ranked-firm-lawyers ratio of 437.46.

Estonia reclaimed its place at the top in terms of most saturated markets considering the total number of lawyers, with the Baltic countries of Lithuania and Latvia taking the second and fourth spots, respectively while Serbia kept steady as the second most saturated market based on this metric.

Country	GDP in USD Billion (Source: World Bank 2022)	2023 Ratio: GDP / Number of Ranked Firm Lawyers
Turkiye	905,987.82	437.46
Bosnia and Herzegovina	24,527.51	275.59
Kosovo	9,429.16	241.77
Slovenia	62,117.77	199.1
Moldova	14,420.95	197.55
Albania	18,882.10	188.82
Austria	471,400.07	185.74
Hungary	178,788.57	175.11
Czech Republic	290,923.53	168.65
Romania	301,261.58	164.18
Slovakia	115,468.80	153.35
Croatia	70,964.61	148.77
Bulgaria	89,040.40	140
Greece	219,065.87	130.71
Poland	688,176.61	130.07
Ukraine	160,502.74	116.14
North Macedonia	13,563.13	113.03
Montenegro	6,095.98	110.84
Latvia	41,153.91	95.93
Serbia	63,501.75	82.58
Lithuania	70,334.30	80.47
Estonia	38,100.81	66.49

In contrast, Poland, with its highest increase in the total number of lawyers working at ranked firms, drops from the seventh spot to the 15th, while Austria slipped from third to seventh.

Following Turkiye, which had the highest increase in the ratio since 2021, Montenegro, which took Estonia’s first place in

2021, dropped to the fifth spot in terms of most saturated markets by having the second highest ratio increase.

Compared to the 2019 data, Kosovo had the highest decrease in the ratio, followed by Turkiye. In terms of ratio increases, Bosnia and Herzegovina and Bulgaria lead the way with increases of 73.74 and 45.61, respectively.



Country	GDP in USD million (2020)	2021 Ratio: GDP / Number of Ranked Firm Lawyers
Turkiye	720,101.21	271.22
Bosnia and Herzegovina	19,788.42	247.36
Austria	430,947.39	235.88
Kosovo	7,611.40	200.3
Slovenia	53,589.61	179.83
Hungary	155,012.93	173.59
Poland	594,164.69	163.23
Czech Republic	245,349.49	163.13
Croatia	55,966.58	159.45
Moldova	11,914.04	158.85
Romania	248,715.55	153.53
Slovakia	104,574.15	147.5
Greece	189,410.11	141.14
Albania	14,799.62	140.95
Ukraine	155,582.01	116.28
Bulgaria	69,105.10	110.92
Latvia	33,505.19	108.08
North Macedonia	12,266.95	107.6
Lithuania	55,887.27	88.01
Estonia	30,650.29	73.86
Serbia	52,960.13	73.45
Montenegro	4,778.58	62.88

Country	GDP in USD million (2018)	2019 Ratio: GDP / Number of Ranked Firm Lawyers
Kosovo	7,900	1,128.57
Turkiye	766,509	497.09
Austria	455,736	222.42
Moldova	11,309	201.95
Bosnia and Herzegovina	19,781	201.85
Slovakia	106,472	183.26
Hungary	155,703	175.54
Greece	218,031	171.95
Poland	585,782	170.58
Slovenia	54,235	167.91
Albania	15,058	161.91
Romania	239,552	158.96
Croatia	60,805	155.91
Czech Republic	244,105	154.69
North Macedonia	12,672	114.16
Latvia	34,849	107.89
Montenegro	5,452	97.36
Bulgaria	65,132	94.39
Ukraine	130,832	82.86
Lithuania	53,251	76.07
Serbia	50,508	74.83
Estonia	30,284	53.41

SATURATION VS GROWTH

In the 2021 *CEE by the Numbers* report, it was shown that Poland, Austria, and Turkiye were the countries with the lowest saturation in terms of their ratios of GDP to the number of ranked law firms. Since then, Poland registered the highest increase in the number of ranked firms. Austria, which ranked second in terms of lowest saturation, followed closely with an increase of 25 but it was overtaken by Ukraine, which, despite being in the middle of the table in terms of saturation,

saw the second-highest increase in the number of ranked firms since 2021.

Turkiye stands out for losing 35 ranked firms in the last couple of years but it still has 20 more than it did in 2019 – an overall increase only exceeded by Poland.

Country	Saturation Ratio in 2021	Evolution in the Number of Ranked Firms Since 2021	Evolution in the Number of Ranked Firms Since 2019
Poland	6751.87	43	29
Austria	5670.36	25	8
Turkiye	5373.89	-35	20
Czech Republic	4718.26	9	-4
Hungary	3974.69	4	0
Romania	3503.04	-6	2
Lithuania	2540.33	7	1
Greece	2282.05	-6	-7
Ukraine	2254.81	30	7
Latvia	2233.68	7	5
Slovenia	2143.58	-3	-1
Bosnia and Herzegovina	1978.84	4	1
Slovakia	1936.56	-4	4
Bulgaria	1771.93	5	-7
Croatia	1695.96	15	2
Estonia	1532.51	5	-4
Moldova	1489.26	2	2
Albania	1345.42	3	-2
Kosovo	1268.57	1	4
Serbia	1260.96	1	10
North Macedonia	1022.25	1	-3
Montenegro	434.42	2	3

When comparing the GDP-to-ranked-firm-lawyer metric to the evolution of the number of lawyers at ranked firms over the years, Turkiye, which had the highest ratio in 2021, stands out as, perhaps surprisingly (and if we do not consider the market's recent economic woes), decreasing the number of lawyers working at ranked firms by 22% compared to 2021. The current total headcount, however, still represents a 34.31% increase from 2019.

Bosnia and Herzegovina and Slovenia have grown compared to 2021, as their low saturation would predict, but they are still registering a decrease when

compared to the numbers in 2019.

Austria's increase in the number of ranked lawyers by 38.92% from 2021 is to be expected given the high ratio in 2021, while Poland's increase of 45.46% (the highest in the region) seems high relative to its ratio being in the second third of the table.

On the flip side, while relatively modest growth in Serbia would be in line with its rather high saturation rates, the increase in the total number of lawyers at ranked firms in the Baltics (around 37-38%) is counterintuitive given those jurisdictions' relatively high saturation levels.

Country	Saturation Ratio in 2021	Evolution in the Number of Lawyers at Ranked Firms Since 2021 (% change)	Evolution in the Number of Lawyers at Ranked Firms Since 2019 (% change)
Turkiye	271.22	-22.00%	34.31%
Bosnia and Herzegovina	247.36	11.25%	-9.18%
Austria	235.88	38.92%	23.87%
Kosovo	200.3	2.63%	457.14%
Slovenia	179.83	4.70%	-3.41%
Hungary	173.59	14.33%	15.11%
Poland	163.23	45.36%	54.08%
Czech Republic	163.13	14.69%	9.32%
Croatia	159.45	35.90%	22.31%
Moldova	158.85	-2.67%	30.36%
Romania	153.53	13.27%	21.77%
Slovakia	147.5	6.21%	29.60%
Greece	141.14	24.89%	32.18%
Albania	140.95	-4.76%	7.53%
Ukraine	116.28	3.29%	-12.48%
Bulgaria	110.92	2.09%	-7.83%
Latvia	108.08	38.39%	32.82%
North Macedonia	107.6	5.26%	8.11%
Lithuania	88.01	37.64%	24.86%
Estonia	73.86	38.07%	1.06%
Serbia	73.45	6.66%	13.93%
Montenegro	62.88	-27.63%	-1.79%

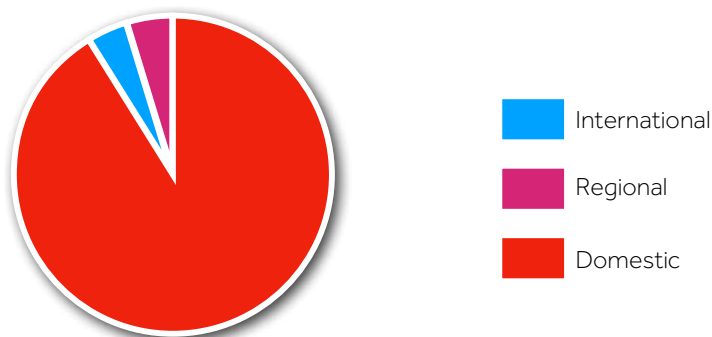
TYPES OF FIRMS



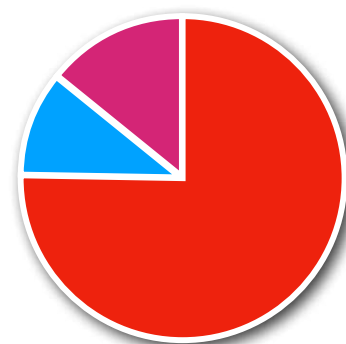


CEE OVERVIEW: TYPES OF FIRMS

Ranked Firms by Type in CEE



Ranked Offices by Type In CEE



Of the 733 law firms ranked across the surveyed 22 countries, 665 were Domestic, 40 were Regional, and 28 were International.

57 additional unranked Domestic firms were looked at, as they were part of a Network that included ranked Domestic firms (see definitions on page 3).

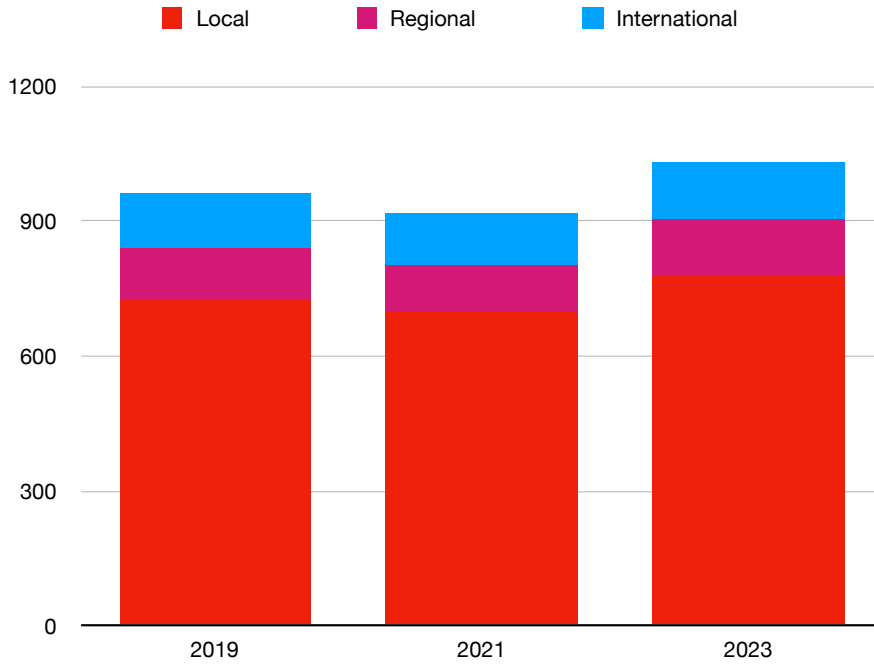
Domestic firms have a total of 776 ranked offices across the region (832 if Network firms are added).

Regional firms have a total of 181 offices across CEE, while International ones have 149. Of those, 123 Regional firm offices are ranked, while 126 of the International offices show up in the rankings.

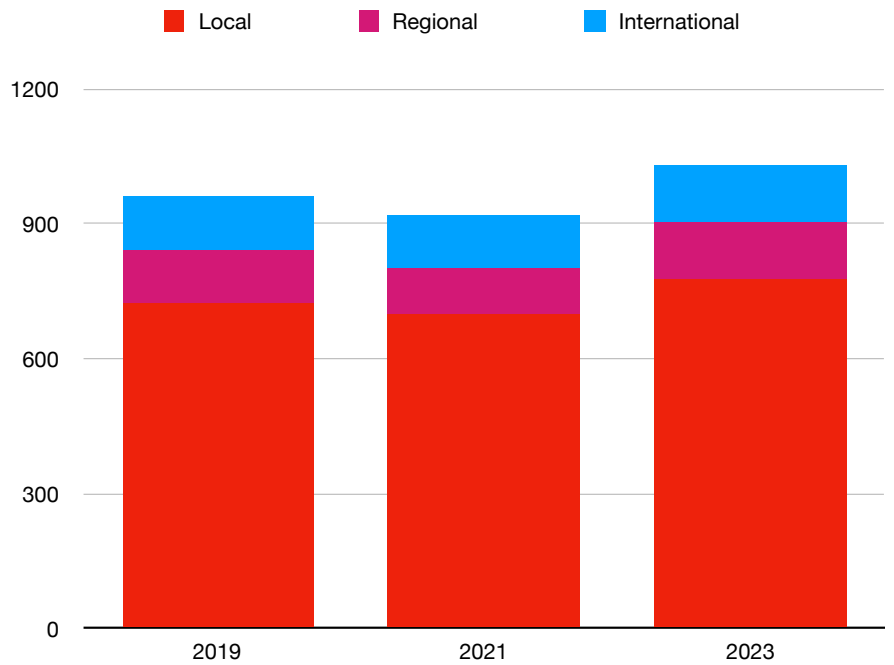
Looking at the evolution of the number of offices – both in the case of ranked or unranked affiliated ones – while the overall numbers decreased slightly between 2019 and 2021, they jumped back up between 2021 and 2023. Over the last four years, the number of Domestic ranked offices increased from 722 to 776, the number of ranked offices of regional firms increased from 114 to 123, and that of international firms from 120 and 126.

While the number of Regional offices – either ranked or unranked – was fuelled by several formerly Domestic firms opening up a third office, the number of International firms increasing is influenced to a great extent by the increased number of reported offices affiliated with the Big 4.

Year	Number of Ranked Offices in CEE			Number of Both Ranked and Unranked Affiliated Offices in CEE		
	Domestic	Regional	International	Domestic	Regional	International
2023	776	123	126	832	181	149
2021	698	103	116	741	150	138
2019	722	114	120	757	154	132



Evolution of the Number of Ranked Offices in CEE by Type



Evolution of the Number of Ranked and Unranked Affiliated Offices in CEE by Type

REGIONAL FIRMS IN CEE

Similarly to the 2019 and 2021 *CEE by the Numbers* reports’ findings, the Baltic states have the most Regional firms, with a large number of pan-Baltic firms. In terms of ranked offices, Lithuania edged into the lead in terms of ranked regional offices compared to 2021 when it shared the spot with Estonia. However, the number of actual offices of regional firms has remained the same – 15.

Greece, Moldova, and Kosovo continue to attract little attention from regional firms with Greece having two, Moldova

having one, while Kosovo has zero ranked offices but two unranked offices of regional firms.

When looking at the percentage of ranked offices, Latvia shared the top spot with Estonia in 2021. In 2023, it took the lead with 45.45% of the ranked offices in the country being a part of a regional firm. After the Baltics, the Western Balkans have the highest percentage of ranked firms that are a part of a regional firm.

Country	Number of Ranked Offices of Regional Firms	Total Number of Regional Firm Offices
Lithuania	13	15
Estonia	11	14
Latvia	10	14
Czech Republic	9	10
Serbia	9	10
Poland	7	9
Austria	6	6
Croatia	6	9
Hungary	6	11
Slovakia	6	11
Ukraine	6	9
Bosnia and Herzegovina	5	9
Romania	5	13
Turkiye	5	5
Bulgaria	4	10
Montenegro	4	7
North Macedonia	4	7
Slovenia	4	6
Albania	3	7
Greece	2	2
Moldova	1	2
Kosovo	0	2



44.73%

of ranked offices in the Baltics are offices of Regional firms, down from 57.9% in 2021.

Country	Number of Ranked Offices of Regional Firms	Percentage of the Total Number of Ranked Offices in the Country
Latvia	10	45.45%
Lithuania	13	44.83%
Estonia	11	44.00%
Bosnia and Herzegovina	5	35.71%
Montenegro	4	30.77%
North Macedonia	4	30.77%
Albania	3	21.43%
Serbia	9	20.93%
Slovenia	4	18.18%
Czech Republic	9	14.75%
Hungary	6	13.95%
Croatia	6	12.50%
Slovakia	6	12.00%
Moldova	1	10.00%
Bulgaria	4	9.09%
Romania	5	7.69%
Ukraine	6	6.06%
Austria	6	5.94%
Poland	7	5.34%
Turkiye	5	5.05%
Greece	2	2.60%
Kosovo	0	0.00%

INTERNATIONAL FIRMS IN CEE

While Poland ranked sixth in terms of the number of Regional firms doing business in the country, it leads the way in the number of International firms on the ground, as 21 have offices in the country, 20 of which are ranked.

The Czech Republic is in the second spot, with 15 ranked offices (out of 15 in total), followed by Hungary with 13 International firms (all ranked).

Similar to the findings of the 2021 report, the Baltic states

dropped in this ranking, with only Eversheds Sutherland and some or all of the Big 4’s legal teams operating in the three countries. Similarly, the Western Balkans only have Big 4-affiliated firms in terms of International firms’ presence.

In terms of the percentage, Hungary continues to lead the pack with 30.23% of the ranked firms in the country being offices of International firms, followed by the Czech Republic with 24.59%.

Country	Number of Ranked Offices of International Firms	Total Number of International Firm Offices
Poland	20	21
Czech Republic	15	15
Hungary	13	13
Greece	11	11
Austria	10	10
Romania	9	9
Slovakia	8	11
Türkiye	8	10
Ukraine	8	8
Bulgaria	4	6
Latvia	4	5
Estonia	3	4
Serbia	2	5
Lithuania	2	4
Albania	2	3
Croatia	2	3
North Macedonia	2	3
Bosnia and Herzegovina	1	4
Slovenia	1	3
Kosovo	1	2
Moldova	1	1
Montenegro	1	1

Country	Number of Ranked Offices of International Firms	Percentage of the Total Number of Ranked Offices in the Country
Hungary	13	30.23%
Czech Republic	15	24.59%
Latvia	4	18.18%
Slovakia	8	16.00%
North Macedonia	2	15.38%
Poland	20	15.27%
Greece	11	14.29%
Albania	2	14.29%
Kosovo	1	14.29%
Romania	9	13.85%
Estonia	3	12.00%
Moldova	1	10.00%
Austria	10	9.90%
Bulgaria	4	9.09%
Turkiye	8	8.08%
Ukraine	8	8.08%
Montenegro	1	7.69%
Bosnia and Herzegovina	1	7.14%
Lithuania	2	6.90%
Serbia	2	4.65%
Slovenia	1	4.55%
Croatia	2	4.17%

6

jurisdictions in CEE have offices of International firms representing over 15% of all ranked offices.

MARKET BREAKDOWN BY TYPE

Primarily as the result of pan-Baltic alliances, the Baltics continue to be at the top of the table when comparing the number of ranked Regional and International firms to that of Domestic firms.

Compared to 2021, North Macedonia saw the highest increase in the percentage of ranked firms that offices of Regional or International firms – an increase by 21.15 percentage points. Kosovo and Bosnia and Herzegovina also saw

Domestic firms losing ground by over 10 percentage points. Baltic markets saw the biggest gains from Domestic firms with Latvia, Estonia, and Lithuania, decreasing the percentage of non-Domestics by 9.7, 9, and 7.37 percentage points, respectively. Poland, the market with the highest increase in the total number of ranked firms, saw Domestic firms’ percentage increase by 5.53 percentage points over the last two years (4.88 percentage points over the last four years).

Country	Percentage of Ranked Offices That Are Offices of Regional or International Firms
Latvia	63.64%
Estonia	56.00%
Lithuania	51.72%
North Macedonia	46.15%
Hungary	44.19%
Bosnia and Herzegovina	42.86%
Czech Republic	39.34%
Montenegro	38.46%
Albania	35.71%
Slovakia	28.00%
Serbia	25.58%
Slovenia	22.73%
Romania	21.54%
Poland	20.61%
Moldova	20.00%
Bulgaria	18.18%
Greece	16.88%
Croatia	16.67%
Austria	15.84%
Kosovo	14.29%
Ukraine	14.14%
Turkiye	13.13%



11

jurisdictions in CEE have decreased the percentage of Domestic firms ranked between 2021 and 2023.

12

jurisdictions in CEE have decreased the percentage of Domestic firms ranked between 2019 and 2023.

Country	Percentage of Ranked Offices That Are Offices of Regional or International Firms in 2023	Percentage of Ranked Offices That Are Offices of Regional or International Firms in 2021	Percentage of Ranked Offices That Are Offices of Regional or International Firms in 2019	Four-Year Evolution
Kosovo	14.29%	0.00%	33.33%	-19.05%
Montenegro	38.46%	36.36%	50.00%	-11.54%
Slovakia	28.00%	29.63%	36.96%	-8.96%
Romania	21.54%	23.94%	26.98%	-5.45%
Moldova	20.00%	12.50%	25.00%	-5.00%
Poland	20.61%	26.14%	25.49%	-4.88%
Slovenia	22.73%	24.00%	26.09%	-3.36%
Ukraine	14.14%	17.39%	17.39%	-3.25%
Latvia	63.64%	73.33%	64.71%	-1.07%
Hungary	44.19%	48.72%	44.19%	+0.00%
Türkiye	13.13%	10.45%	12.66%	+0.47%
Lithuania	51.72%	59.09%	50.00%	+1.72%
Austria	15.84%	17.11%	13.98%	+1.86%
Bulgaria	18.18%	20.51%	15.69%	+2.50%
Croatia	16.67%	12.12%	13.04%	+3.62%
Estonia	56.00%	65.00%	51.72%	+4.28%
Serbia	25.58%	19.05%	21.21%	+4.37%
Bosnia and Herzegovina	42.86%	30.00%	38.46%	+4.40%
Greece	16.88%	13.25%	11.90%	+4.98%
Czech Republic	39.34%	38.46%	33.85%	+5.50%
Albania	35.71%	27.27%	25.00%	+10.71%
North Macedonia	46.15%	25.00%	25.00%	+21.15%

TOTAL HEADCOUNT BY TYPE

Country	Total Number of Lawyers at Ranked Offices	Total Number of Lawyers at Ranked Offices of Domestic Firms	Total Number of Lawyers at Ranked Offices of Regional Firms	Total Number of Lawyers at Ranked Offices of International Firms	Percentage of Lawyers at Ranked Offices of International or Regional Firms
Poland	5,291	3,241	266	1,784	38.75%
Austria	2,538	1,486	548	504	41.45%
Turkiye	2,071	1,712	67	292	17.33%
Romania	1,835	1,255	170	410	31.61%
Czech Republic	1,725	1,027	201	497	40.46%
Greece	1,676	1,403	27	246	16.29%
Ukraine	1,382	1,226	63	93	11.29%
Hungary	1,021	441	148	432	56.81%
Lithuania	874	247	600	27	71.74%
Serbia	769	443	283	43	42.39%
Slovakia	753	517	84	152	31.34%
Bulgaria	636	505	61	70	20.60%
Estonia	573	124	382	67	78.36%
Croatia	477	378	61	38	20.75%
Latvia	429	86	264	79	79.95%
Slovenia	312	219	74	19	29.81%
North Macedonia	120	78	21	21	35.00%
Albania	100	62	17	21	38.00%
Bosnia and Herzegovina	89	64	15	10	28.09%
Moldova	73	66	4	3	9.59%
Montenegro	55	30	13	12	45.45%
Kosovo	39	34	0	5	12.82%



EVOLUTION OF TOTAL HEADCOUNT

Country	Evolution of Total Number of Lawyers Working at Domestic Firms between 2023 and 2021	Evolution of Total Number of Lawyers Working at Regional Firms between 2023 and 2021	Evolution of Total Number of Lawyers Working at International Firms between 2023 and 2021	Evolution of the Percentage of Lawyers at Ranked Offices of International or Regional Firms between 2023 and 2021
Ukraine	+163	-50	-69	+9.26%
Lithuania	+92	+137	+10	+3.85%
Estonia	+49	+72	+37	+3.57%
Bosnia and Herzegovina	+8	0	+1	+1.91%
Poland	+1,024	+143	+484	+0.34%
Greece	+283	-7	+58	+0.25%
Bulgaria	+11	+6	-4	+0.11%
Hungary	+53	+9	+66	-0.26%
Latvia	+23	+57	+39	-0.27%
Czech Republic	+124	+37	+60	-0.50%
Slovakia	+26	+8	+10	-0.59%
Turkiye	-506	-42	-36	-0.87%
Austria	+378	+106	+227	-2.10%
Romania	+112	+17	+86	-2.17%
Croatia	+88	+23	+15	-3.37%
Moldova	-5	0	+3	-4.26%
Slovenia	-7	+29	-8	-5.65%
Albania	-13	+3	+5	-9.43%
Kosovo	-4	0	+5	-12.82%
Serbia	-98	+133	+13	-17.42%
North Macedonia	-17	+9	+14	-18.33%
Montenegro	-28	+7	0	-21.77%



TOTAL NUMBER OF PARTNERS BY TYPE

Country	Total Number of Partners at Ranked Offices	Total Number of Partners at Ranked Offices of Domestic Firms	Total Number of Partners at Ranked Offices of Regional Firms	Total Number of Partners at Ranked Offices of International Firms	Percentage of Partners at Ranked Offices of International or Regional Firms
Poland	1,090	739	67	284	32.20%
Austria	751	459	162	130	38.88%
Turkiye	505	417	20	68	17.43%
Greece	440	384	9	47	12.73%
Romania	425	330	26	69	22.35%
Ukraine	413	368	15	30	10.90%
Czech Republic	366	224	44	98	38.80%
Hungary	281	171	40	70	39.15%
Lithuania	232	71	154	7	69.40%
Bulgaria	216	190	12	14	12.04%
Serbia	209	137	61	11	34.45%
Slovakia	166	129	14	23	22.29%
Estonia	157	50	96	11	68.15%
Croatia	139	117	15	7	15.83%
Slovenia	99	78	17	4	21.21%
Latvia	91	26	53	12	71.43%
Albania	36	26	6	4	27.78%
Bosnia and Herzegovina	32	27	2	3	15.63%
North Macedonia	32	25	3	4	21.88%
Moldova	21	21	0	0	0.00%
Montenegro	16	12	2	2	25.00%
Kosovo	13	12	0	1	7.69%



EVOLUTION OF TOTAL NUMBER OF PARTNERS

Country	Evolution of Total Number of Partners at Domestic Firms between 2023 and 2021	Evolution of Total Number of Partners at Regional Firms between 2023 and 2021	Evolution of Total Number of Partners at International Firms between 2023 and 2021	Evolution of the Percentage of Partners at Ranked Offices of International or Regional Firms between 2023 and 2021
Estonia	+25	+2	+5	+11.85%
Lithuania	+33	+38	+2	+6.70%
Latvia	+12	+9	+7	+6.35%
Ukraine	+125	-4	-1	+6.16%
Poland	+227	+45	+30	+2.83%
Slovakia	+21	+1	0	+2.71%
Bosnia and Herzegovina	+4	0	0	+2.23%
Hungary	+23	+12	0	+0.69%
Bulgaria	+44	+2	+3	+0.53%
Moldova	0	0	0	0.00%
Austria	+83	+30	+23	-0.02%
Romania	+29	-7	+16	-0.13%
Greece	+64	+9	+3	-0.64%
Croatia	+23	+7	0	-2.07%
Türkiye	-46	0	+10	-3.01%
Czech Republic	23	+9	+24	-3.64%
Slovenia	0	+5	+1	-5.08%
Kosovo	-8	0	+1	-7.69%
Montenegro	-5	+1	0	-10.00%
North Macedonia	-2	+2	+2	-11.88%
Serbia	0	+29	+5	-12.74%
Albania	-5	+2	+3	-13.89%

4,013

is the total number of Partners in CEE at a ranked Domestic law firm, up from 3,343 in 2021.

REGIONAL FIRM COVERAGE

Firm	Number of CEE Countries	Number of Lawyers in CEE
Schoenherr	13	383
Wolf Theiss	13	351
Kinstellar	9	242
BNT Attorneys	9	165
SCWP Schindhelm	8	151
Peterka & Partners	8	104
Karanovic & Partners	7	158
Cerha Hempel	6	187
Vukovic & Partners	6	59

Honorable mentions: Noerr and ODI Law Firm (in five countries each).

INTERNATIONAL FIRM COVERAGE

Firm	Number of CEE Countries	Number of Lawyers in CEE
CMS	16	743
Eversheds Sutherland	10	229
Dentons	7	481
Baker McKenzie	6	446
DLA Piper	6	333
Taylor Wessing	6	148
Allen & Overy	5	142
Bird & Bird	4	182
Clifford Chance	4	173

CEE NETWORKS COVERAGE

Firm	Number of CEE Countries	Number of Lawyers in CEE
SEE Legal	13	455
Adriala	9	88
South East Legal Alliance	8	81
Act Legal	7	160
Pontes	7	98
Lex Adria	7	68
CEE Attorneys	7	65
Rivet:Net	6	92
Adriatic Legal Network	6	73
Adria Legal Group	6	24

BIG 4 / TAX AND AUDIT COVERAGE

Firm	Number of CEE Countries	Number of Lawyers in CEE
PwC Legal	20	384
Deloitte Legal	17	468
EY Law	16	229
KPMG Law	12	220
	+	
Ecovis (Tax)	12	54
BDO (Tax)	9	46
Andersen Legal	8	194

TOP HEAVY?





ASSOCIATES-PER-PARTNER RATIO

In order to better understand the seniority structures of law firms across CEE, we calculated the average associates-per-partner ratio in each country.

Given the relatively small size of the markets and the law firms working within them, it is perhaps not a big surprise that that ratio is lowest in Albania and Bosnia and Herzegovina. Bulgaria, with a ratio of 1.94, is in third place, while Kosovo, which ranked first in 2021, is now in fourth place in 2023.

Comparing the current numbers to past reports, Ukraine decreased its associates-per-partner ratio the most in the last two years, followed by Turkiye and Bulgaria. Over a four-year period, Ukraine still has the highest decrease but it is followed by North Macedonia and Bosnia and Herzegovina.

Kosovo is the only country where the average number of associates per partner increased by more than one between 2023 and 2021. Comparing 2023 to 2019, Poland had the highest increase (0.71), followed by Latvia (0.63) and Slovakia (0.61).

Country	Average Number of Associates per Partner
Albania	1.78
Bosnia and Herzegovina	1.78
Bulgaria	1.94
Kosovo	2
Slovenia	2.15
Ukraine	2.35
Austria	2.38
Croatia	2.43
Montenegro	2.44
Moldova	2.48
Hungary	2.63
Estonia	2.65
Serbia	2.68
North Macedonia	2.75
Lithuania	2.77
Greece	2.81
Turkiye	3.1
Romania	3.32
Slovakia	3.54
Czech Republic	3.71
Latvia	3.71
Poland	3.85



The average number of associates per partner at ranked firms in CEE is 2.99, down from 2021 when it was 3.09 but still higher than in 2019 when it was 2.85. How does your firm compare?



Country	Associates per Partner (2023)	Associates per Partner (2021)	Lawyers per Partner (2019)	Two-Year Evolution	Four-Year Evolution
Ukraine	2.35	3.57	3.41	-1.22	-1.06
Turkiye	3.1	3.91	3.47	-0.81	-0.37
Bulgaria	1.94	2.73	2.38	-0.79	-0.44
Serbia	2.68	3.12	3.33	-0.44	-0.65
Slovakia	3.54	3.92	2.93	-0.39	0.61
Montenegro	2.44	2.8	2.5	-0.36	-0.06
Lithuania	2.77	2.99	2.66	-0.23	0.1
Latvia	3.71	3.92	3.09	-0.21	0.63
Czech Republic	3.71	3.85	3.25	-0.14	0.46
Albania	1.78	1.92	1.66	-0.14	0.12
Moldova	2.48	2.57	2.5	-0.1	-0.02
Bosnia and Herzegovina	1.78	1.86	2.63	-0.08	-0.85
North Macedonia	2.75	2.8	3.63	-0.05	-0.88
Slovenia	2.15	2.2	2.8	-0.05	-0.65
Hungary	2.63	2.63	2.64	0	0
Greece	2.81	2.69	2.23	0.12	0.57
Romania	3.32	3.19	3.28	0.13	0.04
Croatia	2.43	2.22	2.39	0.21	0.04
Poland	3.85	3.62	3.15	0.23	0.71
Estonia	2.65	2.32	2.52	0.33	0.13
Austria	2.38	1.97	2.11	0.41	0.27
Kosovo	2	0.9	2.5	1.1	-0.5

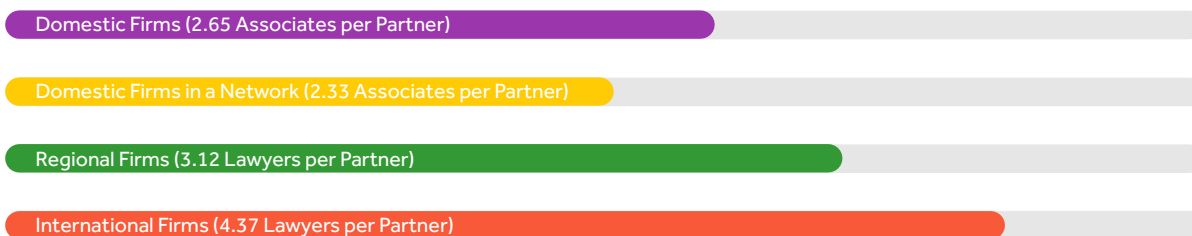
RATIO BY TYPE OF FIRM

Similarly to the 2019 and 2021 *CEE by the Numbers* reports, on average in CEE, the associates-per-partner ratio tends to be lower in Domestic firms (an average of 2.65) than in Regional (3.12) and International (4.37) firms. Domestic firms that are a part of a regional exclusive network seem to be the most top-heavy, with an associates per partner ratio of 2.33.

Looking at the same data from the previous reports, these ratios have increased for all types of firms over the past four

years except for Network members, who decreased their ratio by 0.18 since 2019. International firms have added most associates relative to partners over the last four years, with an increase of the ratio by 0.76.

As a subcategory of International firms, Big 4-affiliated law firms in CEE continue to have the highest associates-per-partner ratio – 6.3 in 2023. This marks a decrease compared to 2021 when the ratio was 7.2.



Country	Average Number of Associates per Partner (2023)	Average Number of Associates per Partner (2021)	Average Number of Associates per Partner (2019)
Domestic	2.65	2.86	2.64
Network	2.33	2.3	2.51
Regional	3.12	3.27	3.04
International	4.37	3.98	3.6

Country	Average Number of Associates per Partner (2023)	Evolution of Average Number of Associates per Partner (2021-2023)	Evolution of Average Number of Associates per Partner (2019-2023)
Domestic	2.65	-0.21	+0.01
Network	2.33	+0.03	-0.18
Regional	3.12	-0.15	+0.08
International	4.37	+0.39	+0.76

0.18

less associates per partner working at Domestic firms in a Network in 2023 compared to 2019.

1.1

more associates per partner working at ranked law firms in Kosovo in 2023 compared to 2021.

0.71

more associates per partner working at Polish ranked law firms in 2023 compared to 2019.

0.76

more associates per partner working at ranked offices of international firms in 2023 than in 2021.

6.3

the associates-per-partner ratio at Big 4 affiliated firms – highest of all types.

A woman in a blue suit is sitting on a balcony, looking out over a harbor. The balcony has a dark metal railing. In the background, there is a body of water with a few boats, and a cityscape is visible in the distance. The sky is bright and clear.

WOMEN IN LAW



FEMALE LAWYERS

In 2023, women accounted for 50.05% of all lawyers at ranked firms in the region, including 62.35% of all lawyers at ranked firms in Greece. Women account for over 60% of all lawyers at ranked firms in Montenegro, Bosnia and Herzegovina, Croatia, and Turkiye, and accounted for more than 55% in nine countries in total. Of the 22 jurisdictions analyzed, only nine have fewer than 50% of all lawyer positions held by women. Kosovo and Austria have the lowest percentages with 30.77% and 38.61%, respectively.

The percentage across the region (50.05%) has increased over the last four years from 2019, when 47.46% of all lawyers were women, despite a slight decrease between 2019 and 2021, when the percentage fell to 46.70%.

Compared to 2021, the highest increase was in Albania, Montenegro, Croatia, and Turkiye, each increasing the percentage of female lawyers by over 10 percentage points. The highest increase since 2019 was in Bosnia and Herzegovina and Albania, each increasing the percentage of female lawyers by over 10 percentage points.

Country	Number of Lawyers	Number of Female Lawyers	Female Lawyers Percentage
Greece	1,676	1,045	62.35%
Montenegro	55	34	61.82%
Bosnia and Herzegovina	89	55	61.80%
Croatia	477	292	61.22%
Turkiye	2,071	1,263	60.99%
Romania	1,835	1,086	59.18%
North Macedonia	120	68	56.67%
Latvia	429	243	56.64%
Estonia	573	321	56.02%
Slovenia	312	165	52.88%
Bulgaria	636	334	52.52%
Lithuania	874	454	51.95%
Albania	100	50	50.00%
Serbia	769	373	48.50%
Poland	5,291	2,533	47.87%
Moldova	73	33	45.21%
Hungary	1,021	460	45.05%
Ukraine	1,382	609	44.07%
Slovakia	753	329	43.69%
Czech Republic	1,725	692	40.12%
Austria	2,538	980	38.61%
Kosovo	39	12	30.77%



50.05%

of all CEE lawyers
at ranked offices
are women.

Country	Female Lawyers Percentage (2021)	Female Lawyers Percentage (2019)	Percentage Two-Year Evolution	Percentage Four-Year Evolution
Bosnia and Herzegovina	58.75%	45.92%	+3.05%	+15.88%
Albania	36.19%	36.56%	+13.81%	+13.44%
Greece	54.55%	54.42%	+7.80%	+7.93%
Montenegro	48.68%	55.36%	+13.14%	+6.46%
Estonia	47.95%	50.09%	+8.07%	+5.93%
Poland	45.80%	43.30%	+2.07%	+4.57%
Croatia	48.43%	57.95%	+12.79%	+3.27%
Hungary	43.34%	41.94%	+1.71%	+3.11%
Austria	37.11%	35.63%	+1.50%	+2.98%
Czech Republic	36.37%	37.39%	+3.75%	+2.73%
Türkiye	49.94%	59.08%	+11.05%	+1.91%
Ukraine	34.08%	42.37%	+9.99%	+1.70%
Latvia	54.84%	55.11%	+1.80%	+1.53%
Slovakia	42.03%	44.06%	+1.66%	-0.37%
North Macedonia	51.75%	57.66%	+4.92%	-0.99%
Slovenia	53.69%	54.18%	-0.81%	-1.30%
Lithuania	53.23%	53.29%	-1.28%	-1.34%
Romania	63.58%	60.98%	-4.40%	-1.80%
Bulgaria	50.24%	54.64%	+2.28%	-2.12%
Serbia	48.27%	50.96%	+0.23%	-2.46%
Moldova	38.67%	51.79%	+6.54%	-6.58%
Kosovo	42.11%	42.86%	-11.34%	-12.09%

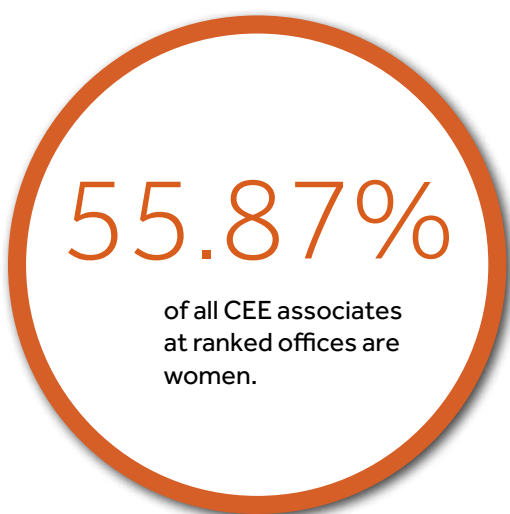
FEMALE ASSOCIATES

When looking at associates only, 18 jurisdictions out of 22 have more female associates than male associates.

Greece and Montenegro keep their first and second spots in terms of the percentage, with Greece having over 70% of all associates being women. Croatia jumps into third with 66.41%. In fact, 12 countries have over 60% of their associate ranks filled up by women.

Compared to the overall percentage of female lawyers of 50.05%, the percentage of female associates across CEE is 55.87%. At the lower end of the table, Kosovo has only 42.31% of all associate positions held by women, followed by the Czech Republic and Austria with 45.40% and 45.61%, respectively.

Country	Number of Associates	Number of Female Associates	Female Associates Percentage
Greece	1,236	868	70.23%
Montenegro	39	27	69.23%
Croatia	338	228	67.46%
Turkiye	1,566	1,040	66.41%
Bosnia and Herzegovina	57	37	64.91%
Estonia	416	270	64.90%
Romania	1,410	868	61.56%
Slovenia	213	130	61.03%
Albania	64	39	60.94%
Bulgaria	420	255	60.71%
Latvia	338	205	60.65%
North Macedonia	88	53	60.23%
Lithuania	642	371	57.79%
Moldova	52	28	53.85%
Serbia	560	298	53.21%
Poland	4,201	2,225	52.96%
Hungary	740	385	52.03%
Ukraine	969	504	52.01%
Slovakia	587	285	48.55%
Austria	1,787	815	45.61%
Czech Republic	1,359	617	45.40%
Kosovo	26	11	42.31%



FEMALE PARTNERS

56.25% of the partners at ranked firms in Bosnia and Herzegovina are women. Followed by Romania with 51.29%, these are the only two markets in CEE that have a female partner percentage of 50% or above.

Of the 22 jurisdictions surveyed, 12 markets have an average percentage of female partners over the regional average of 32.67%. Estonia just missed the line with its 32.48%.



Country	Number of Partners	Number of Female Partners	Female Partners Percentage
Bosnia and Herzegovina	32	18	56.25%
Romania	425	218	51.29%
North Macedonia	32	15	46.88%
Croatia	139	64	46.04%
Turkiye	505	223	44.16%
Montenegro	16	7	43.75%
Latvia	91	38	41.76%
Greece	440	177	40.23%
Bulgaria	216	79	36.57%
Serbia	209	75	35.89%
Lithuania	232	83	35.78%
Slovenia	99	35	35.35%
Estonia	157	51	32.48%
Albania	36	11	30.56%
Poland	1,090	308	28.26%
Hungary	281	75	26.69%
Slovakia	166	44	26.51%
Ukraine	413	105	25.42%
Moldova	21	5	23.81%
Austria	751	165	21.97%
Czech Republic	366	75	20.49%
Kosovo	13	1	7.69%

Kosovo, the Czech Republic, and Austria retain their last three spots on the table.

Compared to 2021, the highest percentage increases were in Montenegro, Albania, and Estonia, with 23.75, 8.34, and 6.08 percentage points more, respectively. The highest decreases were in Bosnia and Herzegovina, Kosovo, and Bulgaria, with 8.04, 7.31, and 6.54 fewer percentage points, respectively.

WOMEN IN LAW GAP

Arguably more relevant since it would indicate a more equitable career progression path, putting those numbers together allows us to see the revealing gap between the percentage of female lawyers and the percentage of female partners at ranked law firms across CEE.

Kosovo, which has a percentage of female lawyers of 42.31%, only has a percentage of female partners of 7.69%, thus leading the way in the gap between the two metrics.

In contrast, in large part because Bosnia and Herzegovina and Romania had the highest percentages of female partners at ranked law firms in CEE, those countries have the smallest gap – Bosnia and Herzegovina registering 8.66 percentage points difference and Romania just over 10.

Also telling are the associates-per-partner ratios within firms. In Kosovo, for example, firms have, on average, 2 associates per partner. In contrast, there are 11 female associates per female partner, resulting in a gap of ratios of 9. The Czech Republic, which was 10th in terms of the percentages gap, jumps to second place in the ratios gap with a ratio of 3.71 associates per partner contrasted to a ratio of 8.23 female associates per female partner.

Bosnia and Herzegovina, Romania, and North Macedonia are the only jurisdictions with a ratio gap smaller than 1, registering 0.27, 0.66, and 0.78, respectively.



Country	Female Associates to Female Partners Percentage Gap
Kosovo	34.62
Estonia	32.42
Albania	30.38
Moldova	30.04
Greece	30.00
Ukraine	26.59
Slovenia	25.68
Montenegro	25.48
Hungary	25.34
Czech Republic	24.91
Poland	24.71
Bulgaria	24.14
Austria	23.64
Turkiye	22.25
Slovakia	22.05
Lithuania	22.01
Croatia	21.41
Latvia	18.89
Serbia	17.33
North Macedonia	13.35
Romania	10.27
Bosnia and Herzegovina	8.66

Country	Associates to Partners Ratio	Female Associates to Female Partners Ratio	Ratios Gap
Kosovo	2	11	9
Czech Republic	3.71	8.23	4.51
Poland	3.85	7.22	3.37
Moldova	2.48	5.6	3.12
Slovakia	3.54	6.48	2.94
Estonia	2.65	5.29	2.64
Austria	2.38	4.94	2.56
Hungary	2.63	5.13	2.5
Ukraine	2.35	4.8	2.45
Greece	2.81	4.9	2.09
Albania	1.78	3.55	1.77
Lithuania	2.77	4.47	1.7
Latvia	3.71	5.39	1.68
Slovenia	2.15	3.71	1.56
Turkiye	3.1	4.66	1.56
Montenegro	2.44	3.86	1.42
Serbia	2.68	3.97	1.29
Bulgaria	1.94	3.23	1.28
Croatia	2.43	3.56	1.13
North Macedonia	2.75	3.53	0.78
Romania	3.32	3.98	0.66
Bosnia and Herzegovina	1.78	2.06	0.27

3

jurisdictions only have a ratios gap of less than one.



LARGEST TEAMS





■ Albania

#	Firm	Number of Lawyers	Number of Partners
1	Boga & Associates	15	7
2	Hodaj & Partners	14	4
3	Kalo & Associates	12	6
4	Deloitte Legal	12	1
5	Frost & Fire Consulting	11	1

■ Bosnia and Herzegovina

#	Firm	Number of Lawyers	Number of Partners
1	Maric & Co	15	6
2	Law Firm Sajic	13	5
3	Karanovic & Partners in cooperation with local lawyers	12	1
4	CMS	10	3
5	Baros, Bicakcic & Partners	8	3

■ Croatia

#	Firm	Number of Lawyers	Number of Partners
1	Hanzekovic & Partners	57	7
2	CMS	31	7
3	Mamic Peric Reberski Rimac	22	6
4	Zuric i Partneri (Kinstellar)	22	4
5	Gugic, Kovacic & Krivic	21	3

■ Estonia

#	Firm	Number of Lawyers	Number of Partners
1	Sorainen	85	13
2	Cobalt	83	13
3	TGS Baltic	44	11
4	Ellex Raidla	43	14
5	Eversheds Sutherland	34	6

■ Austria

#	Firm	Number of Lawyers	Number of Partners
1	Schoenherr	161	40
2	Wolf Theiss	139	46
3	Cerha Hempel	117	29
4	CMS	113	43
5	Dorda	95	22

■ Bulgaria

#	Firm	Number of Lawyers	Number of Partners
1	Djingov, Gouginski, Kyutchukov & Velichkov	53	17
2	Penkov, Markov & Partners	44	16
3	Kambourov & Partners	38	14
4	Boyanov & Co.	37	12
5	CMS	37	8

■ Czech Republic

#	Firm	Number of Lawyers	Number of Partners
1	Havel & Partners	234	33
2	Dentons	76	21
3	Rowan Legal	72	13
4	PRK Partners	71	17
5	Deloitte Legal	63	9

■ Greece

#	Firm	Number of Lawyers	Number of Partners
1	Zepos & Yannopoulos	114	35
2	Potamitis Vekris	104	14
3	Kyriakides Georgopoulos Law Firm	101	18
4	Watson Farley & Williams	69	10
5	Karatzas & Partners	66	10

■ Hungary

#	Firm	Number of Lawyers	Number of Partners
1	CMS	79	10
2	DLA Piper	78	13
3	Oppenheim	54	16
4	Baker Mckenzie	52	8
5	Lakatos, Koves & Partners	48	10

■ Latvia

#	Firm	Number of Lawyers	Number of Partners
1	Sorainen	66	9
2	Cobalt	45	9
3	Ellex Klavins	42	11
4	Eversheds Sutherland	35	7
5	TGS Baltic	33	6

■ Moldova

#	Firm	Number of Lawyers	Number of Partners
1	ACI Partners	14	5
2	Turcan Cazac	12	7
3	Gladei & Partners	11	2
4	Efrim Rosca & Asociatii	11	2
5	Cobzac & Partners	9	1

■ North Macedonia

#	Firm	Number of Lawyers	Number of Partners
1	Polenak Law Firm	21	5
2	Papazoski and Mishev Law Firm (PwC Legal)	14	2
3	Pepeljugoski Law Office	14	3
4	Karanovic & Partners in cooperation with local lawyers	13	2
5	Apostolska Aleksandrovski & Partners	12	6

■ Kosovo

#	Firm	Number of Lawyers	Number of Partners
1	Vokshi & Lata	10	3
2	RPHS Law	8	4
3	Kalo & Associates	6	2
4	Kerveshi & Partners	6	1
5	Deloitte Legal	5	1

■ Lithuania

#	Firm	Number of Lawyers	Number of Partners
1	Ellex Valiunas	108	25
2	Sorainen	93	17
3	Cobalt	90	18
4	TGS Baltic	76	19
5	Walless	67	15

■ Montenegro

#	Firm	Number of Lawyers	Number of Partners
1	Jovovic, Mugosa & Vukovic	19	4
2	CMS	12	2
3	Radonjic Associates	9	2
4	Karanovic & Partners in cooperation with local lawyers	7	1
5	Vukmirovic Misic Law Firm (JPM & Partners)	6	1

■ Poland

#	Firm	Number of Lawyers	Number of Partners
1	CMS	219	28
2	Dentons	187	37
3	Domanski Zakrzewski Palinka	186	45
4	Soltysinski Kawecki & Szlezak	177	32
5	Baker Mckenzie	171	19

■ Romania

#	Firm	Number of Lawyers	Number of Partners
1	Nestor Nestor Diculescu Kingston Petersen	117	31
2	Tuca Zbarcea & Asociatii	105	32
3	Reff & Associates (Deloitte Legal)	75	9
4	Popovici Nitu Stoica & Asociatii	70	16
5	Musat & Asociatii	70	17

■ Slovakia

#	Firm	Number of Lawyers	Number of Partners
1	Soukenik - Strpka	66	5
2	Taylor Wessing	32	6
3	Relevans	32	5
4	Dentons	31	4
5	Allen & Overy	27	3

■ Turkiye

#	Firm	Number of Lawyers	Number of Partners
1	Esin Attorney Partnership (Baker McKenzie)	90	18
2	Balcioglu Selcuk Ardiyok Keki (Dentons)	89	16
3	Yavuz & Uyanik	75	4
4	Kolcuoglu Demirkan Kocakli	74	8
5	Durukan Hukuk Burosu	71	4

■ Serbia

#	Firm	Number of Lawyers	Number of Partners
1	Karanovic & Partners	82	18
2	Vukovic & Partners	52	7
3	JPM & Partners	46	17
4	Zivkovic Samardzic	41	11
5	Milojevic, Sekulic and Associates	40	5

■ Slovenia

#	Firm	Number of Lawyers	Number of Partners
1	Jadek & Pensa	38	13
2	Senica & Partners	28	7
3	Selih & Partners	27	11
4	ODI Law Firm	26	6
5	Rojs, Peljhan, Prelesnik & Partners	24	13

■ Ukraine

#	Firm	Number of Lawyers	Number of Partners
1	Asters	125	23
2	Sayenko Kharenko	106	19
3	Avellum	64	7
4	Integrites	57	12
5	Everlegal	50	5

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