

The AI Talent Frontier

A CEO's Guide to the AI Specialist Market in CEE

08.2025



Table of contents

Executive Summary	3	Part 6: The Innovation Ecosystem: Startups, Funding & Key Players	14
Author's Introduction	4	Key AI Startup Examples	14
Part 1: The Global Imperative – The Race for AI Dominance	5-6	Top Employers of AI Talent in CEE	14
Part 2: Defining the Frontier – A CEO's View of the CEE Tech Hub	7	Top Universities Fueling the AI Talent Pool	15
Part 3: Quantifying the Opportunity – The CEE AI Talent Pool	8-9	Part 7: The Operational Landscape: Legal, IP & Infrastructure	16
CEE Talent Distribution by Country (% of Total Pool)	8	Part 8: The CEO's Playbook: Strategy, Opportunity & Risk	17
Top 10 CEE Cities – The Epicenters of AI Innovation:	9	Strategic Recommendations	17
Part 4: The DNA of CEE Talent – A Multi-Dimensional Analysis	10	Part 9: Future Outlook: CEE's AI Trajectory to 2028	18
Experience & Seniority: A Market of Experts	11	Why Global Tech Leaders Choose Poland for AI?	18
Developer Quality & Competitive Performance	11	Part 10: Conclusion	19
Seamless Communication: World-Class English Proficiency	12	Part 11: Appendices & Data Sources	20
Work Culture & Remote Readiness	12	About Next Technology Professionals	21-22
Part 5: The Financial Case: A Cost-Benefit Analysis	13		
CEE vs. California Salary Benchmarks	13		
Cost Savings Analysis	13		

Executive Summary

The CEE region represents a strategic inflection point for companies seeking to scale their AI capabilities. With world-class talent, competitive costs, and a stable, EU-aligned business environment.

Market Size

**50-70K
professionals**

Concentrated AI talent
pool across CEE region

Cost Efficiency

**Up to 73.6%
savings**

Compared to California
talent market

Quality Assurance

**Top 10
globally**

CEE developers in
international rankings

Communication

**Very High
proficiency**

English language skills
for seamless
collaboration

Author's Introduction

As a technology CEO, I talk every day with leaders facing the same dilemma: **how to turn the AI revolution into a competitive advantage**, not a series of costly mistakes. The data is unequivocal – it's no longer a question of "if," but "how fast." The following statistics, sourced from leading global analyst firms, are not a forecast. They are a snapshot of the battlefield where the war for AI talent is being fought right now.

This report is designed to be **your strategic map**. We will move from the global "why" to the regional "where," and finally to the actionable "how," enabling you to navigate the complexities of **the AI talent market and make decisions that will define your company's future**.



Dominik Jurek
Chief Executive Officer



**Your Go-To Partner
for Tech Talent in Poland** 



Looking for support in hiring?

[LinkedIn](#)



Part 1: The Global Imperative – The Race for AI Dominance

The current business landscape is being reshaped by one dominant force: Artificial Intelligence. For leaders, understanding the scale and velocity of this change is the first step toward harnessing its power.

- **The Adoption Explosion:** The proportion of organizations adopting AI has more than doubled since 2017 (Source: Nasdaq, 2024).
- **The Economic Impact:** By 2028, agentic AI alone could generate up to \$450 billion in economic value (Source: Capgemini, 2025).
- **The Bottom-Line Results:** Organizations that have adopted AI report tangible cost decreases and revenue increases (Source: Nasdaq, 2024).
- **The Urgency for Leaders:** 93% of leaders believe that scaling AI within the next 12 months is critical to achieving a competitive advantage (Source: Capgemini, 2025).
- **The R&D Focus:** High-growth companies are dedicating up to 43% of their product roadmap to AI, while the largest enterprises allocate up to 25% of their total R&D budgets to AI innovation (Source: ICONIQ Growth, 2025).

- **The Progress Paradox:** Despite this urgency, nearly half of companies (46%) admit they are not hiring fast enough, with 60% citing a critical lack of qualified candidates as the primary bottleneck (Source: ICONIQ Growth, 2025).
- **The Cost of Delay:** In key Western markets, the average time to hire a single AI/ML engineer is 70 days, while the ROI on their work is immediate, with productivity gains averaging 15-30% (Source: ICONIQ Growth, 2025).



The CEO's Conclusion:

The global war for talent is forcing **new strategies**. With local talent pools depleted, the only logical move for companies in the US or Western Europe is to source expertise from global technology hubs. **The CEE region is becoming a key battlefield in this global race.**

■ ■ ■ Part 2: Defining the Frontier – A CEO's View of the CEE Tech Hub

For the purpose of this report, the CEE (Central and Eastern Europe) region is defined as a dynamic and growing technology talent hub. Our analysis covers three core sub-regions:






- **The Visegrád Group & Baltic States (V4+B3):** Poland, Czechia, Slovakia, Hungary, Estonia, Latvia, and Lithuania.
- **Southeastern Europe (SEE):** Romania, Bulgaria, Slovenia, Croatia, and the emerging tech markets of the Western Balkans.
- **Eastern European Tech Powerhouses:** With a special focus on Ukraine and acknowledging the talent pool from Belarus.

Part 3: Quantifying the Opportunity – The CEE AI Talent Pool

Our analysis reveals a concentrated **talent pool of 50,000 to 70,000 AI professionals across the CEE region**. This is an ecosystem with clear centers of gravity, offering unparalleled opportunities for efficient scaling.

75% of AI experts in the CEE region are located in just five leading locations

CEE Talent Distribution by Country (% of Total Pool):

1.  Poland: 35.1% - The undisputed leader and most mature AI talent market.
2.  Ukraine: 11.3% - A powerhouse of high-quality technical talent.
3.  Czechia: 10.6% - A hub of engineering and R&D excellence.
4.  Romania: 10.4% - A major hub for engineering talent, speed, and scale.
5.  Serbia: 7.5% - A rapidly growing market with notable niche expertise.

Top 10 CEE Cities – The Epicenters of AI Innovation:

1. Warsaw, Poland
12.6%

2. Prague, Czechia
7.1%

3. Budapest, Hungary
5.4%

4. Krakow, Poland
4.9%

5. Kyiv, Ukraine
4.25%

6. Wroclaw, Poland
4.0%

7. Gdansk, Poland
3.3%

8. Poznan, Poland
2.6%

9. Sofia, Bulgaria
2.3%

10. Zagreb, Croatia
1.9%





Strategic Insight for CEOs

The AI specialist pool in Warsaw alone is larger than in all of Ukraine or Romania. This allows for highly efficient, targeted recruitment strategies focused on cities rather than entire nations.

Part 4: The DNA of CEE Talent – A Multi-Dimensional Analysis

The true value of CEE talent lies beyond the numbers. It is defined by a unique combination of experience, proven quality, and seamless global integration.

1.  Poland ranked #1 for talent availability

4.1 Experience & Seniority: A Market of Experts

This is not a market of junior developers; it's a market of seasoned experts capable of leading complex projects from day one.

69.5% of professionals have **more than 4 years of experience.**

29.5% are senior leaders and architects with **over 10 years of experience.**

4.2 Developer Quality & Competitive Performance

CEE developers are not only cost-effective but also **rank among the technically strongest globally.** This is not an opinion; it is a fact demonstrated by objective, international rankings.

- **HackerRank (2023):** CEE developers remain top performers in problem-solving and machine learning domains, with Poland and Ukraine frequently ranking in the top 10 globally.
- **Pentalog / SkillValue Rankings (2022):** Poland ranked 7th globally for overall developer quality, based on coding assessments.
- **ICPC World Finals (2022–2024):** Universities from Poland, Czechia, and Ukraine consistently reached the world finals, showcasing deep algorithmic expertise at the academic level.
- **Emerging Europe IT Report (2023):** Poland ranked #1 for talent availability.

4.3 Seamless Communication: World-Class English Proficiency

According to **the EF English Proficiency Index (2024)**, the CEE region demonstrates exceptional capabilities, ensuring frictionless collaboration in global teams.

Country	EF EPI Score	Global Proficiency Band
Poland	612 (Warsaw)	Very High (10th globally)
Croatia	607	Very High
Hungary	606	Very High
Slovakia	604	Very High
Bulgaria	601	Very High
Romania	601	Very High
Czechia	596	High
Serbia	590	High
Ukraine	562	High

4.4 Work Culture & Remote Readiness

The region exhibits strong compatibility with Western work standards.

- **Remote-readiness:** Mature post-COVID work-from-home systems are standard. The time zone overlap (4–6 hours) with the US East Coast is a significant operational advantage.
- **Work Culture:** There is deep and growing familiarity with Agile and DevOps methodologies. A strong sense of ownership and transparent communication are hallmarks of international teams in the region.



Strategic Insight for CEOs

The CEO's Strategic Advantage: World-class English proficiency is not a 'nice-to-have'; **it's a direct driver of ROI**. It eliminates communication friction and ensures that CEE teams can integrate seamlessly into any global organization from day one.

Part 5: The Financial Case: A Cost-Benefit Analysis

CEE vs. California Salary Benchmarks (USD, Annual)

Experience Level	CEE Average	California Average
Junior	\$29,250	\$79,918
Mid-level	\$46,750	\$143,583
Senior	\$62,250	\$221,256
Expert/Principal	\$79,250	\$300,500

Cost Savings Analysis

Experience Level	Cost Savings (CEE vs. California)
Expert/Principal	73.6%
Senior	71.9%
Mid-level	67.4%
Junior	63.4%

Financial Insight for CEOs:

The greatest cost efficiency (**73.6% savings**) is achieved when hiring top-tier talent. CEE experts earn up to 4 times less than their California counterparts while delivering world-class expertise, representing an exceptional ROI for complex AI projects.

Part 6: The Innovation Ecosystem: Startups, Funding & Key Players

- **Key AI Startup Examples:** Poland: Eleven Labs (AI voice tech), deepsense.ai (enterprise AI), Romania: UiPath (RPA unicorn), Estonia: Veriff (identity verification).
- **Funding Trends:** The region is home to active local VC firms (Inovo VC, Credo Ventures) and benefits from numerous EU-funded AI innovation programs.
- **Top Employers of AI Talent in CEE:** Intel (USA), Bosch (Germany), Continental (Germany), NVIDIA (USA), Yandex (Netherlands/International), Procter & Gamble (USA), Samsung Electronics (South Korea), EPAM Systems (USA), deepsense.ai (Poland), Accenture (Ireland), IBM (USA), and Adobe (USA).

AI Startups from CEE:



Top Employers of AI Talent in CEE



- **Top Universities Fueling the AI Talent Pool:**



Warsaw University of Technology



AGH University of Krakow



Wrocław University of Science and Technology



University of Warsaw



National Technical University of
Ukraine 'Kyiv Polytechnic Institute



Gdańsk University of Technology



Poznan University of Technology



University POLITEHNICA of Bucharest



Belarusian State University



Charles University



AGH University of Science and Technology (Poland)



University of Warsaw (Poland)

■ ■ ■ Part 7: The Operational Landscape: Legal, IP & Infrastructure

The region is a mature and safe environment for international business, with solid legal frameworks and robust IP protection.

- **IP and Data Laws:** EU member countries offer full GDPR compliance and strong IP enforcement.
- **Hiring Models: Flexible hiring models** are well-established, with B2B contracting being particularly common and efficient in countries like Poland and Romania.
- **Infrastructure:** High-speed internet, cloud readiness, and modern tech hubs are the standard in all major cities.

Part 8: The CEO's Playbook: Strategy, Opportunity & Risk

8.1 Strategic Recommendations

For Remote Hiring: Target Ukraine for high technical depth and remote culture, Romania for stability and EU compliance, and Serbia for rising talent at lower costs.

For R&D Expansion: Focus on Poland for its talent volume and ecosystem maturity, and Czechia for its strong technical universities and deep developer pool.

For Academic Partnerships: Look to Estonia for its policy-aligned innovation environment and Poland for its large graduate pool and industry-academia cooperation.

Geopolitical Instability: A key factor in Ukraine, though talent remains resilient and active remotely.

Brain Drain: Senior engineers are attractive targets for Western European and North American firms. A strong retention strategy is crucial.

Market Saturation: Key hubs like Warsaw and Prague are experiencing increased hiring pressure and competition from global firms.

Part 9: Future Outlook: CEE's AI Trajectory to 2028

The CEE AI market is expected to **reach full maturity by 2027-2028**, with increasing specialization and premium positioning in global markets. As Western markets face talent shortages, **CEE is positioned to become the primary source of AI talent for European and global enterprises.**

Why Global Tech Leaders Choose Poland for AI?

Strategic AI Investments by US Giants



“We appreciate the critical role that Poland plays in the European Union, and we are committed to helping to protect its cybersecurity and cyber resilience...

Our goal is to bring **the most advanced AI infrastructure to every sector of the Polish economy**, strengthening the nation’s economic competitiveness.”

Brad Smith

Vice Chair & President, Microsoft



 **Poland = strategic digital ally in Europe**




“Leadership, ambition and talent are giving Poland a new position in European innovation.

Poland is currently **the largest engineering hub, with over 2,000 employees...** We see **enormous opportunities for Poland in artificial intelligence.**”

Sundar Pichai

CEO, Google / Alphabet



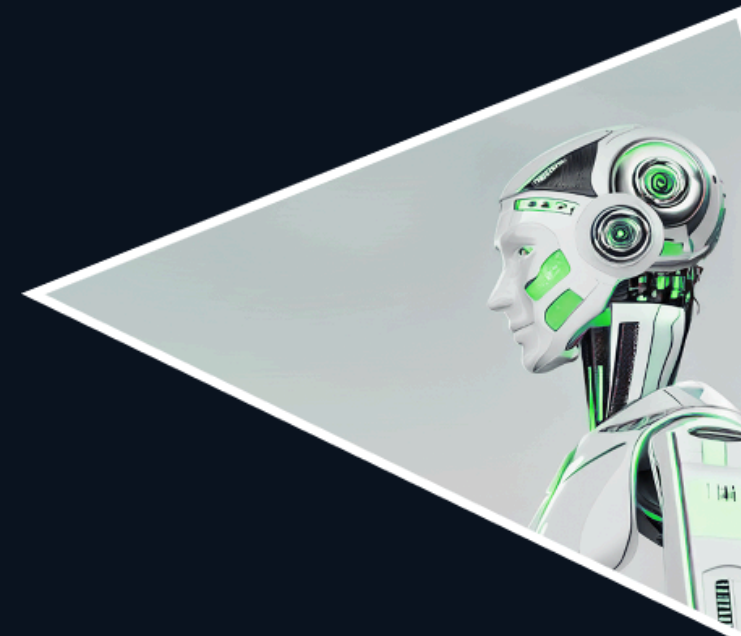
 **Poland = innovation engine + deep talent pool**

Part 10: Conclusion

The CEE region represents a strategic inflection point for companies seeking to scale their AI capabilities. With **world-class talent, competitive costs, and a stable, EU-aligned business environment, CEE markets offer a sustainable competitive advantage for forward-thinking organizations.** Success requires understanding local dynamics, building long-term partnerships, and leveraging the region's unique combination of technical excellence and cost efficiency.



The companies that establish a strong CEE presence now **will be best positioned to lead the next phase of the AI revolution.**



Part 11: Appendices & Data Sources



- The LinkedIn Talent Insights (July 2025),
- Next Technology Professionals Internal Database
- OECD & Eurostat labor market data
- EF English Proficiency Index 2024
- HackerRank, Pentalog, ICPC Global Rankings (2022-2024)
- Emerging Europe IT Report (2023)
- Startup ecosystem maps (Dealroom, Crunchbase)
- National AI strategies (Estonia, Poland, Romania)
- Capgemini Research Institute, "Rise of agentic AI" (2025)
- ICONIQ Growth, "The Builder's Playbook: 2025 State of AI Report" (2025)
- Nasdaq, "Digitizing Governance: Exploring AI's Transformational Influence in the Boardroom" (2024)

Data Sources:

General/Multicountry Sources: Qubit Labs (2025), Index.dev (2025), Alcor BPO (2023), PayScale (2025), ERI Economic Research Institute, Itentio IT Recruitment (May 2025), Jobicy (2025), Glassdoor, TalentUp, ERI, SalaryExpert, Nucamp, Jobicy (2025), Bureau of Labor Statistics, ZipRecruiter, Talent.com, Salary.com, California job portals, <https://centraleuropeantimes.com/microsoft-google-invest-big-in-polish-cloud-ai-infrastructure-skilling-cybersecurity/>, <https://notesfrompoland.com/2025/02/13/google-announces-ai-partnership-with-poland/>

Photo on the cover: Gabriele Malaspina <https://unsplash.com/photos/a-white-robot-is-standing-in-front-of-a-black-background-CjWsslYVnPI>



Check out our other reports to learn more about the IT and AI job market in Poland and across Europe.



We are a recruitment agency and outsourcing company, supporting the growth of tech teams at every stage: from individual experts to full competence centers.

[Contact us](#)



Headquarters

Next Technology Professionals Sp. z o.o. Ogrodowa 58, 00-876 Warszawa, Poland

E-mail: contact@nexttechnology.io

Phone: +48 791 040 167

