



CEE

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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 Ceiling* issue), and the second and third published as standalone reports in 2017 and 2019. 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, Belarus, Bosnia and Herzegovina, Bulgaria, Croatia, the Czech Republic, Estonia, Greece, Hungary, Kosovo, Latvia, Lithuania, Moldova, Montenegro, North Macedonia, Poland, Romania, Russia, Serbia, Slovakia, Slovenia, Turkey, and Ukraine. The data in this report was gathered between August 1 and September 31, 2021, from the websites of 876 law firms (with a total of 1,164 offices) ranked by *Chambers & Partners* and *Legal 500* in any one practice area in each of those 24 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 29 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.).

“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 only in one country or in 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 originate from within the region and their members are primarily CEE-based (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 Four 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:
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LEGAL MARKET SIZE





2F 6	2F 7	2F 8	2F 9	2F 10	2F 11	3F 1	3F 2	3F 3	3F 4	3F 5	3F 6	3F 7	
30	31	32	33	34	35	36	37	38	39	40	41	42	43

NUMBER OF LAW FIRMS

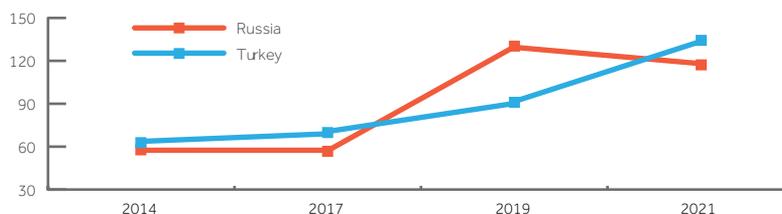
Which CEE country has the most law firms ranked by *Chambers & Partners* or *Legal 500*?

In 2021, Turkey is once again in the lead with 134 firms ranked. Turkey had the most ranked firms in both 2014 and 2017 but dropped to the 6th spot, with 81, in the 2019 survey of the market, only to bounce back to the top in 2021.

A total of nine jurisdictions have over 50 ranked firms in 2021, compared to 11 in 2019, with Hungary and Bulgaria dropping below that threshold.

Country	Number of Ranked Firms
Turkey	134
Russia	117
Poland	87
Greece	83
Austria	76
Romania	71
Ukraine	69
Slovakia	54
Czech Republic	52
Serbia	42
Bulgaria	39
Hungary	39
Croatia	33
Slovenia	25
Lithuania	22
Estonia	20
Belarus	16
Latvia	15
North Macedonia	12
Albania	11
Montenegro	11
Bosnia and Herzegovina	10
Moldova	8
Kosovo	6

Russia registered a decrease in the number of ranked firms since 2019, with 117 firms included in the rankings in 2021 compared to 130 in the previous edition of *CEE by the Numbers*.



While the 2019 *CEE by the Numbers* report showed the number of firms ranked by *Chambers & Partners* and *Legal 500* expanding significantly across the entire region over the past few years, the number of ranked firms has decreased in almost every country between 2019 and 2021.

The one jurisdiction that stands against this trend is Turkey, which saw the addition of 53 newly ranked firms. In contrast, Austria, Poland, and Ukraine have each dropped 20 or more ranked firms in 2021, compared to 2019.

Country	Number of Ranked Firms 2021	Number of Ranked Firms 2019	Compared to 2019	Compared to 2017
Albania	11	20	-9	+1
Austria	76	96	-20	+35
Belarus	16	20	-4	+3
Bosnia and Herzegovina	10	16	-6	N/A
Bulgaria	39	57	-18	0
Croatia	33	49	-16	+7
Czech Republic	52	68	-16	+9
Estonia	20	33	-13	-1
Greece	83	85	-2	+41
Hungary	39	51	-12	0
Kosovo	6	5	+1	N/A
Latvia	15	24	-9	-6
Lithuania	22	31	-9	0
Moldova	8	10	-2	N/A
Montenegro	11	13	-2	N/A
North Macedonia	12	21	-9	0
Poland	87	109	-22	+28
Romania	71	71	0	+25
Russia	117	130	-13	+60
Serbia	42	38	+4	+11
Slovakia	54	53	+1	+28
Slovenia	25	24	+1	+11
Turkey	134	81	53	+64
Ukraine	69	95	-26	+30

However, when comparing the current numbers to those of the 2017 *CEE by the Numbers* report, 14 jurisdictions still have more ranked firms today than they did four years ago, with four having the exact same number, and only Estonia and Latvia having fewer.*

* Data was not available for four of the countries in 2017, since not enough firms were ranked that year in Bosnia and Herzegovina, Montenegro, Moldova, or Kosovo.

NUMBER OF LAWYERS

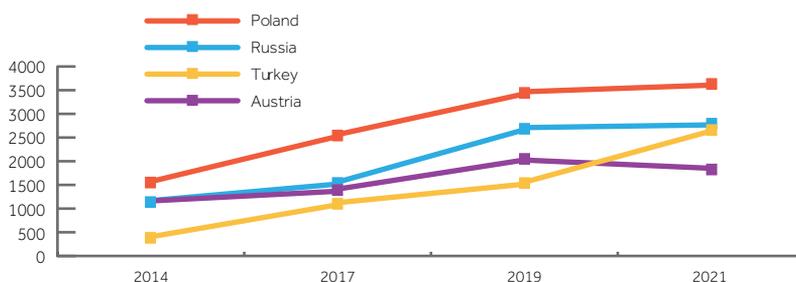
Same as in the 2019 *CEE by the Numbers* report, Poland leads the way in terms of the number of lawyers working at ranked firms, with a total headcount of 3,622. Russia and Turkey follow with 2,788 and 2,655, respectively.

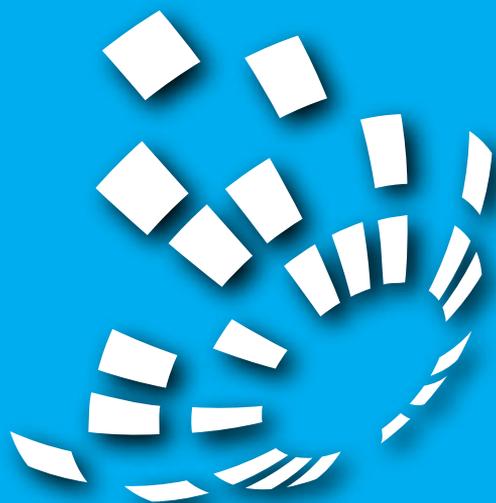
Of the four markets where data was not available in 2014 and 2017, three increased in terms of the total number of lawyers working at ranked firms, with Kosovo, Montenegro, and Moldova gaining 31, 20, and 19, respectively.

Bosnia and Herzegovina now has 80 lawyers working at ranked firms, nine fewer than in 2019.

Country	Number of Lawyers
Poland	3,622
Russia	2,788
Turkey	2,655
Austria	1,827
Romania	1,620
Czech Republic	1,504
Greece	1,342
Ukraine	1,338
Hungary	893
Serbia	721
Slovakia	709
Lithuania	635
Bulgaria	623
Estonia	415
Croatia	351
Latvia	310
Slovenia	298
Belarus	251
North Macedonia	114
Albania	105
Bosnia and Herzegovina	80
Montenegro	76
Moldova	75
Kosovo	38

Poland and Russia have taken the first and second spots in every report since 2014. The only change to the podium happened between 2019 and 2021 when the total number of lawyers at ranked firms in Austria lost its third spot to Turkey for the first time.





Country	Total Number of Lawyers 2014	Total Number of Lawyers 2017	Total Number of Lawyers 2019	Total Number of Lawyers 2021
Albania	88	59	93	105
Austria	1,143	1,394	2,049	1,827
Belarus	110	143	211	251
Bosnia and Herzegovina	N/A	N/A	89	80
Bulgaria	402	571	690	623
Croatia	114	385	390	351
Czech Republic	873	1,038	1,578	1,504
Estonia	417	444	567	415
Greece	630	886	1,268	1,342
Hungary	457	726	887	893
Kosovo	N/A	N/A	7	38
Latvia	268	379	323	310
Lithuania	486	641	700	635
Moldova	N/A	N/A	56	75
Montenegro	N/A	N/A	56	76
North Macedonia	117	134	111	114
Poland	1,553	2,540	3,434	3,622
Romania	835	1,263	1,507	1,620
Russia	1,150	1,544	2,681	2,788
Serbia	311	500	675	721
Slovakia	284	323	581	709
Slovenia	178	231	323	298
Turkey	393	1,107	1,542	2,655
Ukraine	332	669	1,579	1,338

11,980

more lawyers working at ranked firms in CEE in 2021 than in 2014.

72%

more lawyers working at ranked firms in Turkey in 2021 than in 2019.

2,262

more lawyers working at ranked firms in Turkey in 2021 than in 2014.

303%

more lawyers working at ranked firms in Ukraine in 2021 than in 2014.

993

more lawyers working at ranked firms in CEE in 2021 than in 2019.

112.78%

more lawyers working at ranked firms in CEE in 2021 than in 2014.

NUMBER OF LAWYERS: EVOLUTION

Country	Total Number of Lawyers Compared to 2019	Total Number of Lawyers Compared to 2017	Total Number of Lawyers Compared to 2014
Albania	+12	+46	+17
Austria	-222	+433	+684
Belarus	+40	+108	+141
Bosnia and Herzegovina	-9	N/A	N/A
Bulgaria	-67	52	+221
Croatia	-39	-34	+237
Czech Republic	-74	+466	+631
Estonia	-152	-29	-2
Greece	74	+456	+712
Hungary	+6	+167	+436
Kosovo	+31	N/A	N/A
Latvia	-13	-69	+42
Lithuania	-65	-6	+149
Moldova	+19	N/A	N/A
Montenegro	+20	N/A	N/A
North Macedonia	+3	-20	-3
Poland	+188	+1,082	+2,069
Romania	+113	+357	+785
Russia	+107	+1,244	+1,638
Serbia	+46	+221	+410
Slovakia	+128	+386	+425
Slovenia	-25	+67	+120
Turkey	+1,113	+1,548	+2,262
Ukraine	-241	+669	+1,006

Turkey's increase of 1,113 ranked-firm lawyers since the 2019 report (and 2,262 lawyers more than in 2014) is the largest of all CEE countries.

Poland added 894 ranked-firm lawyers between 2017 and 2019, but only 188 more between 2019 and 2021. As a result, Turkey's boom in the last two years means that it overtook Poland in terms of the total increase in the number of lawyers since the *CEE by the Numbers* research started in 2014.

Turkey, Poland, Russia, and Ukraine each added over 1,000 lawyers to their total, compared to 2014.

In 2019 North Macedonia was the only market to have a decreasing number of lawyers working at ranked firms. As a result of a total drop of 152 lawyers between 2019 and 2021, Estonia now joins it.

AVERAGE SIZE OF LAW FIRMS

The top three has not changed between 2019 and 2021 when it comes to the average size of ranked law firms. Poland keeps its top spot with an average headcount of 41.63, followed by the Czech Republic in second and Lithuania in third, with 28.92 and 28.86, respectively.

While Austria also maintains its fourth spot, Romania dropped from fifth to seventh, with Russia and Hungary claiming the fifth and sixth spots.

Of the surveyed markets, Poland is the only one to average over 40 lawyers per ranked firm. Eight jurisdictions have an average between 20 and 30 and nine have an average between 10 and 20. Six markets average fewer than 10 lawyers per ranked firm.

While Kosovo maintains its last position from the 2019 report, its average is now 6.33, up from 1.40 in 2019.

Country	Average Number of Lawyers
Poland	41.63
Czech Republic	28.92
Lithuania	28.86
Austria	24.04
Russia	23.83
Hungary	22.90
Romania	22.82
Estonia	20.75
Latvia	20.67
Turkey	19.81
Ukraine	19.39
Serbia	17.17
Greece	16.17
Bulgaria	15.97
Belarus	15.69
Slovakia	13.13
Slovenia	11.92
Croatia	10.64
Albania	9.55
North Macedonia	9.50
Moldova	9.38
Bosnia and Herzegovina	8.00
Montenegro	6.91
Kosovo	6.33



CHANGING TEAM SIZES

The 2019 *CEE by the Numbers* report found that the average size of ranked law firms has decreased across most of CEE, with only two jurisdictions (Turkey and Serbia) showing an uptick between 2017 and 2019.

In 2021, we see a reversal of that trend with all but two jurisdictions (Serbia and Slovenia) increasing the average number of lawyers at ranked firms over the last two years.

Serbia decreased by 0.59 while Slovenia's ranked firms have 1.54 fewer lawyers, on average, in 2021 than they had in 2019.

While Poland was one of the big losers alongside Austria between 2017 and 2019, it increased its average headcount the most between 2019 and 2021.

Austria, although it increased its average size of ranked firms between 2019 and 2021 by 2.7, still records the highest loss in terms of average headcount over the last four years, with the 2021 average 9.96 lower than the 2017 one.

Overall, ten countries increased their average size over the last four years and another ten decreased it, among the markets where 2017 data was available.

Country	Average Number of Lawyers at Ranked Firms in 2017	Average Number of Lawyers at Ranked Firms in 2019	Two Year Evolution	Four Year Evolution
Albania	5.9	4.65	+4.90	+3.65
Austria	34	21.34	+2.70	-9.96
Belarus	11	10.55	+5.14	+4.69
Bosnia and Herzegovina	N/A	5.93	+2.07	N/A
Bulgaria	14.64	12.11	+3.86	+1.33
Croatia	14.81	7.96	+2.68	-4.17
Czech Republic	24.14	23.21	+5.71	+4.78
Estonia	21.14	17.18	+3.57	-0.39
Greece	21.1	14.92	+1.25	-4.93
Hungary	18.62	17.39	+5.51	+4.28
Kosovo	N/A	1.40	+4.93	N/A
Latvia	18.05	13.46	+7.21	+2.62
Lithuania	29.14	22.58	+6.28	-0.28
Moldova	N/A	5.60	+3.78	N/A
Montenegro	N/A	4.31	+2.60	N/A
North Macedonia	11.17	5.29	+4.21	-1.67
Poland	43.05	31.50	+10.13	-1.42
Romania	27.46	21.23	+1.59	-4.64
Russia	27.09	20.62	+3.21	-3.26
Serbia	16.13	17.76	-0.59	+1.04
Slovakia	12.42	10.96	+2.17	+0.71
Slovenia	16.5	13.46	-1.54	-4.58
Turkey	15.81	19.04	+0.77	+4.00
Ukraine	17.15	16.62	+2.77	+2.24

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, 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 can 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.

With 22 fewer ranked firms between 2019 and 2021 but with an increase in their average size of 10.13, Poland would seem to perfectly illustrate such consolidation. While at a different scale, Albania reinforces this narrative with nine less ranked firms (an almost 50% drop from 2019) but a 4.9 higher average size.

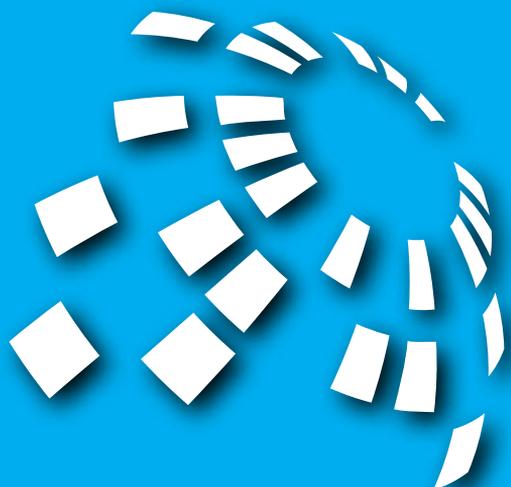
The one jurisdiction that stands out in this analysis is Turkey which, while adding 53 ranked firms, maintained a similar ranked firm average size (an increase of 0.77).

Country	Change in the Number of Ranked Law Firms (2019 to 2021)	Change in The Average Number of Lawyers at Ranked Firms (2019 to 2021)
Albania	-9	+4.90
Austria	-20	+2.70
Belarus	-4	+5.14
Bosnia and Herzegovina	-6	+2.07
Bulgaria	-18	+3.86
Croatia	-16	+2.68
Czech Republic	-16	+5.71
Estonia	-13	+3.57
Greece	-2	+1.25
Hungary	-12	+5.51
Kosovo	+1	+4.93
Latvia	-9	+7.21
Lithuania	-9	+6.28
Moldova	-2	+3.78
Montenegro	-2	+2.60
North Macedonia	-9	+4.21
Poland	-22	+10.13
Romania	0	+1.59
Russia	-13	+3.21
Serbia	+4	-0.59
Slovakia	+1	+2.17
Slovenia	+1	-1.54
Turkey	53	+0.77
Ukraine	-26	+2.77

Country	Change in the Number of Ranked Law Firms (2017 to 2021)	Change in The Average Number of Lawyers at Ranked Firms (2017 to 2021)
Albania	+1	+3.65
Austria	+35	-9.96
Belarus	+3	+4.69
Bulgaria	0	+1.33
Croatia	+7	-4.17
Czech Republic	+9	+4.78
Estonia	-1	-0.39
Greece	+41	-4.93
Hungary	0	+4.28
Latvia	-6	+2.62
Lithuania	0	-0.28
North Macedonia	0	-1.67
Poland	+28	-1.42
Romania	+25	-4.64
Russia	+60	-3.26
Serbia	+11	+1.04
Slovakia	+28	+0.71
Slovenia	+11	-4.58
Turkey	+64	+4.00
Ukraine	+30	+2.24



While the data sets seem to indicate a consolidation in the last couple of years, comparing the evolution of the two metrics over the last four years still indicates CEE legal markets are more splintered now than they were in 2017.





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 2020) to the number of ranked firms in that specific market.

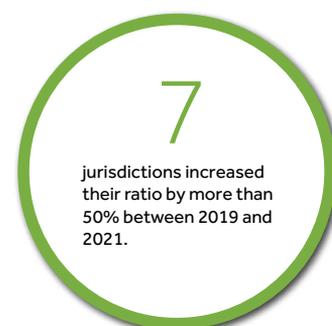
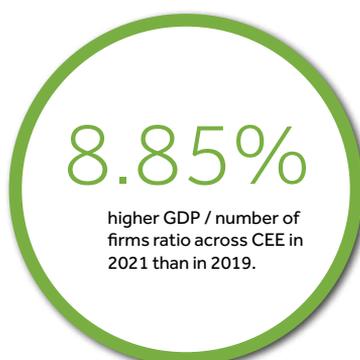
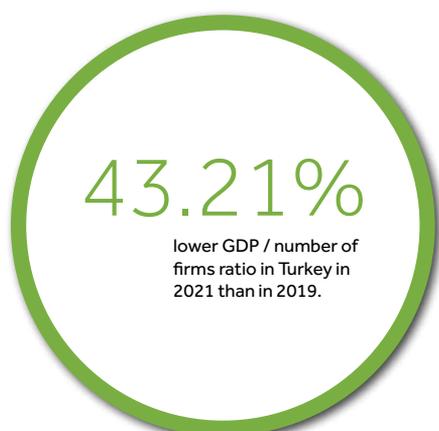
When seen through this lens, same as in the 2019 *CEE by the Numbers* report, Montenegro appears to be the most crowded market, with Russia being the least crowded.

Country	GDP in USD Billion (Source: World Bank 2020)	2021 Ratio: GDP / Number of Ranked Firms
Russia	1,483,497.78	12,679.47
Poland	594,164.69	6,829.48
Austria	430,947.39	5,670.36
Turkey	720,101.21	5,373.89
Czech Republic	245,349.49	4,718.26
Hungary	155,012.93	3,974.69
Belarus	60,258.24	3,766.14
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

Compared to the 2019 report, Turkey dropped from the second spot to the fourth. Romania is also two spots lower into the eighth position, followed by Lithuania that jumped up to ninth from 12th.

Overall, CEE markets seem to be less crowded now than in 2019, with 17 of the 24 jurisdictions increasing their ratio, while Turkey, Kosovo, Greece, Slovenia, Serbia, Slovakia, and Russia have a lower ratio than in 2019.

Country	GDP in USD Billion (Source: World Bank 2018)	2019 Ratio: GDP / Number of Ranked Firms
Russia	1,657,553	12,750.41
Turkey	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
Belarus	59,662	2,983.10
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

Russia is also least crowded when comparing the number of lawyers at ranked firms against its GDP, with a GDP to ranked-firm lawyers ratio of 532.10.

Because of their relatively small average ranked firm sizes, Bosnia and Herzegovina and Belarus push their way among the top five least saturated markets.

Country	GDP in USD Billion (Source: World Bank 2020)	2021 Ratio: GDP / Number of Ranked Firm Lawyers
Russia	1,483,497.78	532.10
Turkey	720,101.21	271.22
Bosnia and Herzegovina	19,788.42	247.36
Belarus	60,258.24	240.07
Austria	430,947.39	235.88
Kosovo	7,611.4	200.30
Slovenia	53,589.61	179.83
Hungary	155,012.93	173.59
Poland	594,164.69	164.04
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	147.50
Greece	189,410.11	141.14
Albania	14,799.62	140.95
Ukraine	155,582.01	116.28
Bulgaria	69,105.1	110.92
Latvia	33,505.19	108.08
North Macedonia	12,266.95	107.60
Lithuania	55,887.27	88.01
Estonia	30,650.29	73.86
Serbia	52,960.13	73.45
Montenegro	4,778.58	62.88

In contrast Poland, with its highest average ranked firm size, drops from the second spot in the previous ranking to the ninth position in this one.

Despite having only 11 ranked firms, with an average of only 6.91 lawyers at each, Montenegro seems to be most crowded in both rankings simply due to its USD 4,778.58 billion GDP.



Country	Total Number of Lawyers at Ranked Firms (2019)	GDP in USD Billion (Source: World Bank 2018)	2019 Ratio: GDP / Number of Ranked Firm Lawyers
Kosovo	7	7,900	1,128.57
Russia	2,681	1,657,553	618.26
Turkey	1,542	766,509	497.09
Belarus	211	59,662	282.76
Austria	2,049	455,736	222.42
Bosnia and Herzegovina	89	19,781	222.26
Moldova	56	11,309	201.95
Slovakia	581	106,472	183.26
Hungary	887	155,703	175.54
Greece	1,268	218,031	171.95
Poland	3,434	585,782	170.58
Slovenia	323	54,235	167.91
Albania	93	15,058	161.91
Romania	1,507	239,552	158.96
Croatia	390	60,805	155.91
Czech Republic	1,578	244,105	154.69
North Macedonia	111	12,672	114.16
Latvia	323	34,849	107.89
Montenegro	56	54,52	97.36
Bulgaria	690	65,132	94.39
Ukraine	1,579	130,832	82.86
Lithuania	700	53,251	76.07
Serbia	675	50,508	74.83
Estonia	567	30,284	53.41

SATURATION VS GROWTH

In the 2019 *CEE by the Numbers* report, it was shown that Russia, Turkey, Belarus, Slovakia, Austria, Greece, and Albania – the least saturated markets based on the 2017 GDP-to-ranked-law-firm metric – were also, for the most part, the markets where the number of ranked firms increased the most between 2017 and 2019.

While Turkey, the country with the second smallest saturation on the 2019 GDP-to-ranked-law-firm metric

did register a spike in the number of ranked law firms between 2019 and 2021, Russia, the least saturated market actually decreased by 13 law firms. That, however, might be a reflection of the consolidation trend over the last two years (see page 14). If the scope is widened and growth over the last four years is looked at instead, Russia registered the second-largest growth in terms of the number of ranked law firms, by adding 60 since 2017.

Country	Saturation Ratio in 2019	Growth in the Number of Firms Between 2019 and 2021	Growth in the Number of Firms Between 2017 and 2021
Turkey	9,463.07	+53	+64
Serbia	1,329.16	+4	+11
Kosovo	1,580	+1	N/A
Slovenia	2,259.79	+1	+11
Slovakia	2,008.91	+1	+28
Romania	3,373.97	0	+25
Moldova	1,130.9	-2	N/A
Greece	2,565.07	-2	+41
Montenegro	419.38	-2	N/A
Belarus	2,983.1	-4	+3
Bosnia and Herzegovina	1,318.73	-6	N/A
Albania	752.9	-9	+1
Latvia	1,452.04	-9	-6
North Macedonia	603.43	-9	0
Lithuania	1,717.77	-9	0
Hungary	3,053	-12	0
Russia	12,750.41	-13	+60
Estonia	917.7	-13	-1
Czech Republic	3,589.78	-16	+9
Croatia	1,240.92	-16	+7
Bulgaria	1,142.67	-18	0
Austria	4,747.25	-20	+35
Poland	5,374.15	-22	+28
Ukraine	1,377.18	-26	+30

A similar link can be seen when comparing the GDP-to-ranked-firm-lawyer metric to the evolution of the number of lawyers at ranked firms over the years.

Highly saturated, with a ratio of only 82.86, Ukraine saw the sharpest decrease between 2019 and 2021. It does, however, still have 669 more lawyers at ranked firms today than it did in 2017.

In contrast, Turkey, with one of the highest ratios (and lowest saturations) in the region, has ballooned, adding 1,113 to the total number of lawyers working at ranked firms between 2019 and 2021.

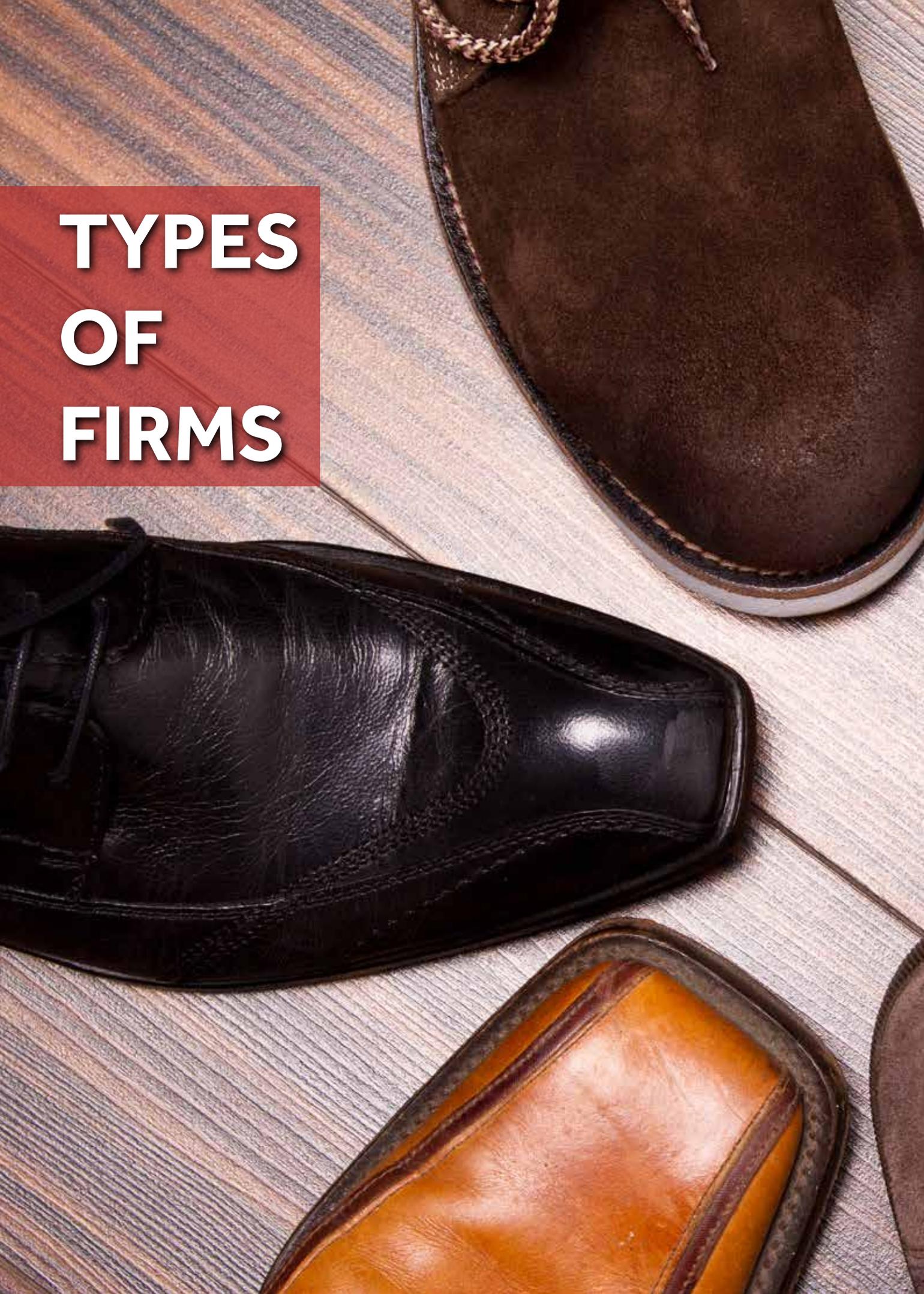
While Russia, with an even higher ratio in 2019, only grew by 107 between 2019 and 2021, it did add a total of 1,244 since 2017.

Poland, an already relatively crowded market in 2019 based on its ratio of 170.58, still added 188 lawyers since 2019, and a total of 1,082 since 2017.

Kosovo, with the smallest saturation in 2019, has since added 31 ranked-firm lawyers to the seven it already had, a fivefold expansion of the market.

Country	GDP to Number of Lawyers Ratio in 2019	Ranked Firm Lawyers Growth 2019 to 2021	Ranked Firm Lawyers Growth 2017 to 2021
Turkey	497.09	+1,113	+1,548
Poland	170.58	+188	+1,082
Slovakia	183.26	+128	+386
Romania	158.96	+113	+357
Russia	618.26	+107	+1,244
Greece	171.95	+74	+456
Serbia	74.83	+46	+221
Belarus	282.76	+40	+108
Kosovo	1,128.57	+31	N/A
Montenegro	97.36	+20	N/A
Moldova	201.95	+19	N/A
Albania	161.91	+12	+46
Hungary	175.54	+6	+167
North Macedonia	114.16	+3	-20
Bosnia and Herzegovina	222.26	-9	N/A
Latvia	107.89	-13	-69
Slovenia	167.91	-25	+67
Croatia	155.91	-39	-34
Lithuania	76.07	-65	-6
Bulgaria	94.39	-67	+52
Czech Republic	154.69	-74	+466
Estonia	53.41	-152	-29
Austria	222.42	-222	+433
Ukraine	82.86	-241	+669

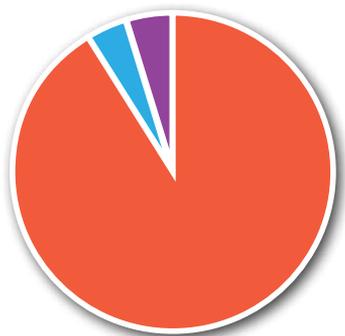
TYPES OF FIRMS





CEE OVERVIEW: KINDS OF FIRMS

Ranked Firms by Type In CEE



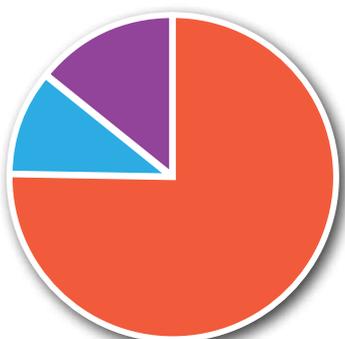
Of the 876 law firms ranked across the surveyed countries, 772 were Domestic, 39 were International, and 34 were Regional.

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

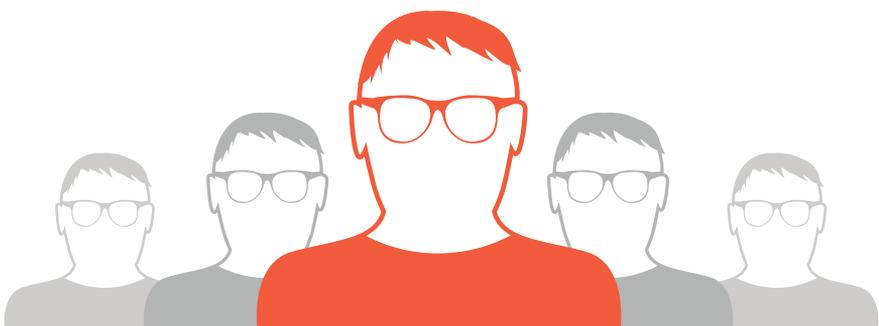
Domestic firms have a total of 810 offices across the region (839 if Network firms are added), out of which 799 are ranked in either *Chambers & Partners* or *Legal 500*.

Regional firms have a total of 155 offices across CEE, while International ones have 170. Of those, 114 Regional firm offices are ranked, while 144 of the International offices show up in the rankings.

Ranked Offices by Type In CEE



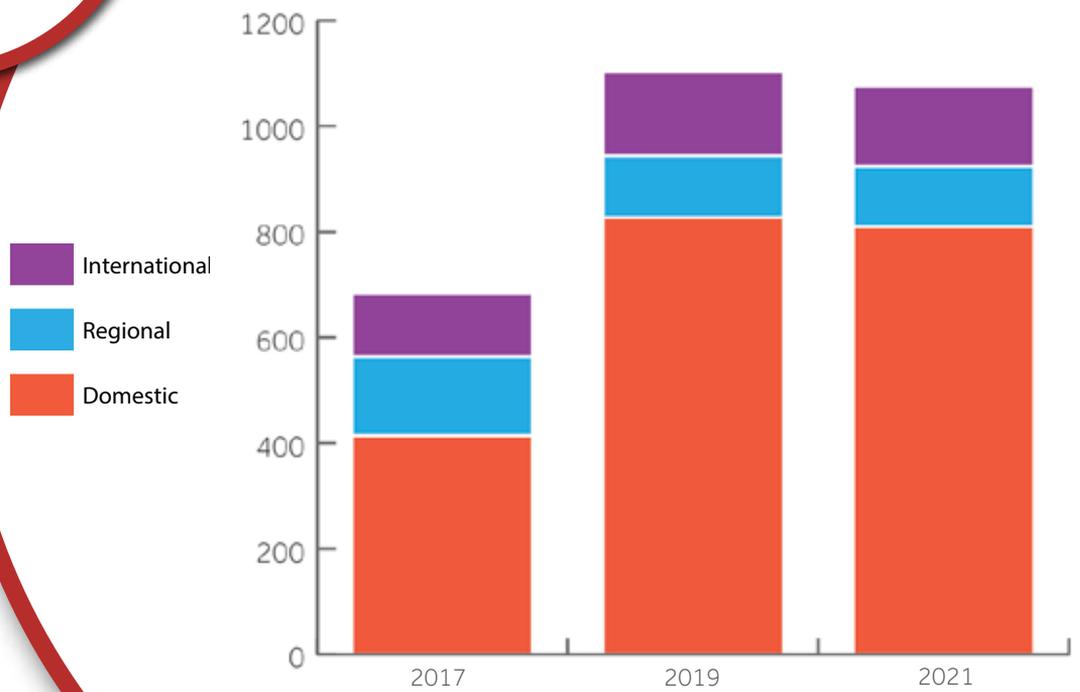
8.13%
of Domestic firm offices are a part of a regional Network.



4.56

average number of offices that regional firms have in CEE.

Evolution of the Number of Ranked Offices in CEE by Type



4.36

average number of offices that International firms have in CEE.

REGIONAL FIRMS IN CEE

Similarly to the 2019 *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, Estonia and Lithuania share the first spot with 12 offices of regional firms, each. When looking at the total number of firm offices, ranked or unranked, Lithuania edges ahead with 15 offices.

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

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

When looking at the percentage of ranked offices, 17 of the surveyed markets have offices of Regional firms representing anywhere between 5% and 25% of the total number of ranked offices. In the Baltics, that percentage jumps to 54.55% in Lithuania and 60% in both Estonia and Latvia.

Country	Number of Ranked Offices of Regional Firms	Total Number of Regional Firm Offices
Lithuania	12	13
Estonia	12	15
Latvia	9	13
Romania	8	12
Czech Republic	7	8
Russia	7	10
Serbia	6	7
Slovakia	6	8
Ukraine	6	9
Hungary	5	10
Austria	4	4
Belarus	4	7
Slovenia	4	7
Poland	4	8
Bulgaria	4	9
Croatia	3	5
Turkey	3	5
Montenegro	2	3
Bosnia and Herzegovina	2	4
North Macedonia	2	4
Albania	2	6
Greece	1	1
Moldova	1	1
Kosovo	0	2



57.9%

of ranked offices in the
Baltics are offices of
Regional firms.

Country	Number of Ranked Offices of Regional Firms	% of the Total Number of Ranked Offices in the Country
Estonia	12	60.00%
Latvia	9	60.00%
Lithuania	12	54.55%
Belarus	4	25.00%
Bosnia and Herzegovina	2	20.00%
Albania	2	18.18%
Montenegro	2	18.18%
Slovenia	4	16.00%
North Macedonia	2	15.38%
Serbia	6	14.29%
Czech Republic	7	13.46%
Hungary	5	12.50%
Moldova	1	12.50%
Romania	8	11.27%
Slovakia	6	11.11%
Bulgaria	4	10.26%
Croatia	3	9.09%
Ukraine	6	8.70%
Russia	7	5.98%
Austria	4	5.13%
Poland	4	4.60%
Turkey	3	2.24%
Greece	1	1.20%
Kosovo	0	0.00%

INTERNATIONAL FIRMS IN CEE

Although Russia ranked mid-table 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 29 have offices in the country, 28 of which are ranked.

Poland is in the second spot, with 19 ranked offices and 20 in total, despite it being ranked 14th in terms of the number of offices of regional firms.

The Baltic States dropped in this ranking, with only Eversheds Sutherland and some or all of the Big Four's legal teams operating in the three countries.

Kosovo is the only jurisdiction covered in this report without any International firm offices at all. Moldova joins it as well, if only ranked offices are counted.

Country	Number of Ranked Offices of International Firms	Total Number of International Firm Offices
Russia	28	29
Poland	19	20
Czech Republic	13	15
Hungary	13	13
Slovakia	10	12
Turkey	9	10
Greece	10	10
Romania	9	9
Austria	9	9
Ukraine	6	7
Bulgaria	4	5
Latvia	2	4
Serbia	2	4
Estonia	1	3
Lithuania	1	3
Belarus	0	2
Bosnia and Herzegovina	1	2
Albania	1	2
Montenegro	2	2
Slovenia	2	2
North Macedonia	1	2
Croatia	1	2
Moldova	0	1
Kosovo	0	0

Country	Number of Ranked Offices of International Firms	% of the Total Number of Ranked Offices in the Country
Hungary	13	32.50%
Czech Republic	15	25.00%
Russia	29	23.93%
Poland	20	21.84%
Slovakia	12	18.52%
Montenegro	2	18.18%
Latvia	4	13.33%
Romania	9	12.68%
Greece	10	12.05%
Austria	9	11.54%
Bulgaria	5	10.26%
Bosnia and Herzegovina	2	10.00%
Albania	2	9.09%
Ukraine	7	8.70%
Slovenia	2	8.00%
North Macedonia	2	7.69%
Turkey	10	6.72%
Estonia	3	5.00%
Serbia	4	4.76%
Lithuania	3	4.55%
Croatia	2	3.03%
Belarus	2	0.00%
Moldova	1	0.00%
Kosovo	0	0.00%

4

jurisdictions in CEE have offices of International firms representing over 20% of all ranked offices.



MARKET BREAKDOWN BY TYPE

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

It seems that the trend of fewer ranked firms across the region has taken a heavier toll on Domestic firms, with the percentage of regional or international firms' ranked offices increasing in all but five markets: Kosovo, Belarus, Turkey,

Montenegro, and Slovenia.

Latvia jumped from 45.83% in 2019 to 86.67% in 2021, with Estonia and Latvia following closely and reaching 75% and 68.18%, respectively.

Hungary, which has the highest percentage outside of the Baltics, increased from 37.25% to 45%. At the other pole, Turkey added 134 ranked offices between 2019 and 2021, leading to a decrease of 2.5 percentage points.

Country	% of Ranked Offices of Regional and International Firms
Latvia	86.67%
Estonia	75.00%
Lithuania	68.18%
Hungary	45.00%
Czech Republic	42.31%
Bosnia and Herzegovina	40.00%
Belarus	37.50%
Montenegro	36.36%
Albania	36.36%
Slovakia	33.33%
Russia	30.77%
North Macedonia	30.77%
Poland	27.59%
Moldova	25.00%
Slovenia	24.00%
Romania	23.94%
Serbia	23.81%
Bulgaria	23.08%
Ukraine	18.84%
Austria	16.67%
Croatia	15.15%
Greece	13.25%
Turkey	9.70%
Kosovo	0.00%



19

jurisdictions in CEE have decreased the percentage of Domestic firms ranked.

Country	% of Ranked Offices of Regional and International Firms in 2019	% of Ranked Offices of Regional and International Firms in 2021	Evolution
Latvia	45.83%	86.67%	40.84
Estonia	45.45%	75.00%	29.55
Lithuania	45.16%	68.18%	23.02
Albania	20.00%	36.36%	16.36
Bosnia and Herzegovina	26.67%	40.00%	13.33
North Macedonia	19.05%	30.77%	11.72
Bulgaria	12.28%	23.08%	10.80
Czech Republic	32.35%	42.31%	9.96
Hungary	37.25%	45.00%	7.75
Serbia	18.42%	23.81%	5.39
Moldova	20.00%	25.00%	5.00
Russia	26.15%	30.77%	4.62
Greece	9.41%	13.25%	3.84
Poland	23.85%	27.59%	3.74
Austria	13.54%	16.67%	3.13
Croatia	12.24%	15.15%	2.91
Romania	22.54%	23.94%	1.40
Slovakia	32.08%	33.33%	1.25
Ukraine	17.89%	18.84%	0.95
Slovenia	25.00%	24.00%	-1.00
Montenegro	38.46%	36.36%	-2.10
Turkey	12.20%	9.70%	-2.50
Belarus	40.00%	37.50%	-2.50
Kosovo	20.00%	0.00%	-20.00

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	% of Lawyers at Ranked Offices of International or Regional Firms
Poland	3,622	2,199	123	1,300	39.29%
Russia	2,788	1,451	264	1,073	47.96%
Turkey	2,655	2,239	100	316	15.67%
Austria	1,841	1,122	442	277	39.05%
Romania	1,620	1,143	153	324	29.44%
Czech Republic	1,504	903	164	437	39.96%
Greece	1,342	1,120	34	188	16.54%
Ukraine	1,338	1,063	113	162	20.55%
Hungary	907	438	103	366	51.71%
Serbia	721	541	150	30	24.97%
Slovakia	709	491	76	142	30.75%
Lithuania	635	155	463	17	75.59%
Bulgaria	623	494	55	74	20.71%
Estonia	415	75	310	30	81.93%
Croatia	351	290	38	23	17.38%
Latvia	310	63	207	40	79.68%
Slovenia	298	226	45	27	24.16%
Belarus	251	200	51	0	20.32%
North Macedonia	123	104	12	7	15.45%
Albania	105	75	14	16	28.57%
Bosnia and Herzegovina	80	56	15	9	30.00%
Montenegro	76	58	6	12	23.68%
Moldova	75	71	4	0	5.33%
Kosovo	38	38	0	0	0.00%

7,812

lawyers in CEE work at a ranked office of a Regional or International law firm.

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	% of Partners at Ranked Offices of International or Regional Firms
Poland	784	508	22	254	35.20%
Russia	671	394	49	228	41.28%
Austria	616	377	132	107	38.80%
Turkey	541	465	20	56	14.05%
Romania	387	301	33	53	22.22%
Greece	364	320	0	44	12.09%
Czech Republic	310	201	35	74	35.16%
Ukraine	293	243	19	31	17.06%
Hungary	249	158	21	70	36.55%
Serbia	175	137	32	6	21.71%
Bulgaria	167	146	10	11	12.57%
Lithuania	159	38	116	5	76.10%
Slovakia	144	108	13	23	25.00%
Estonia	125	25	94	6	80.00%
Croatia	109	94	8	7	13.76%
Slovenia	93	78	12	3	16.13%
Latvia	63	14	44	5	77.78%
Belarus	47	40	7	0	14.89%
Albania	36	31	4	1	13.89%
North Macedonia	31	28	1	2	9.68%
Bosnia and Herzegovina	28	23	2	3	17.86%
Moldova	21	21	0	0	0.00%
Montenegro	20	17	1	2	15.00%
Kosovo	20	20	0	0	0.00%



REGIONAL FIRM COVERAGE

Firm	Number of CEE Countries	Number of Lawyers in CEE
Wolf Theiss	13	340
Schoenherr	12	357
BNT Attorneys	10	113
Peterka & Partners	9	103
Kinstellar	7	178
Cerha Hempel	7	159
Karanovic & Partners	6	120
Noerr	6	103

Honorable mentions: Cobalt, Magnusson, ODI Law Firm, and Sorainen (in four countries each).

INTERNATIONAL FIRM COVERAGE

Firm	Number of CEE Countries	Number of Lawyers in CEE
CMS	17	465
Eversheds Sutherland	10	255
Dentons	8	606
Baker Mckenzie	7	527
DLA Piper	7	399
Taylor Wessing	6	128
White & Case	5	199
Clifford Chance	5	148
Allen & Overy	5	141

Honorable mentions: Bird & Bird, Norton Rose Fulbright, and Squire Patton Boggs (in four countries each).

CEE NETWORKS COVERAGE

Firm	Number of CEE Countries	Number of Lawyers in CEE
SEE Legal	12	375
Adriala	9	86
SCWP Schindhelm	8	145
Pontes	7	98
SELA	7	89
CEE Attorneys	7	67
NGL Symbio	6	163
Act Legal	6	148
TLA	6	101
Rivet:net	6	92

BIG 4 / TAX AND AUDIT COVERAGE

Firm	Number of CEE Countries	Number of Lawyers in CEE
Deloitte Legal	19	425
EY Law	19	276
PwC Legal	12	197
KPMG Legal	9	182
	+	
Ecovis (Tax)	12	34
BDO (Tax)	10	55

DOMESTICS GAINING GROUND

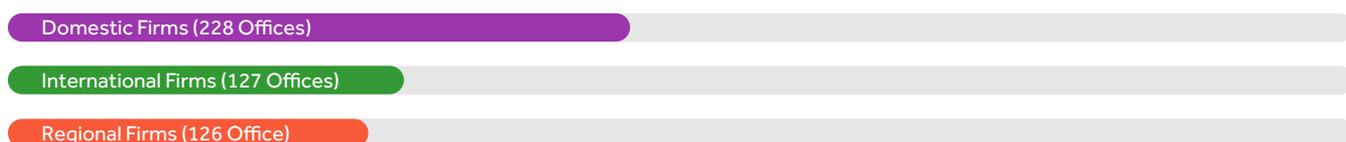
Between 2014 and 2017 the number of ranked International and Regional firms has increased only marginally (from 37 to 40 and from 30 to 32, respectively), whereas the number of ranked Domestic firms has almost doubled.

Between 2017 and 2019 the number of International ranked firms present in CEE grew by another four firms, whereas the number of ranked Regional firms went back to 30. Domestic firms recorded the greatest growth in the total number of offices of ranked firms, jumping from 228 offices in 2014 to 417 in 2017, and then to 827 in 2019. International firms

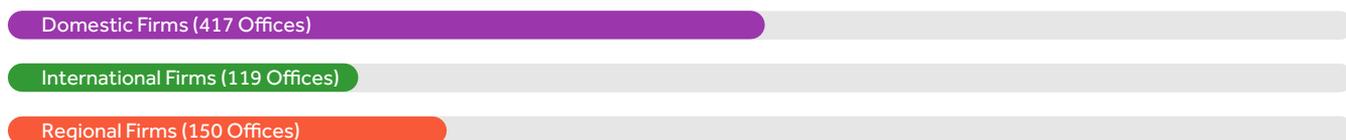
had 127 ranked offices in CEE in 2014, then only 119 in 2017, before jumping up to 159 in 2019 (though it should be noted that the 2019 *CEE by the Numbers* report was the first to factor in the Big Four-affiliated law firms).

The period of 2019 to 2021 has marked a general decrease in the number of offices ranked across the region. The one element that stands out is the increase in the number of Partners at Regional firms, despite the decrease in the number of offices covered.

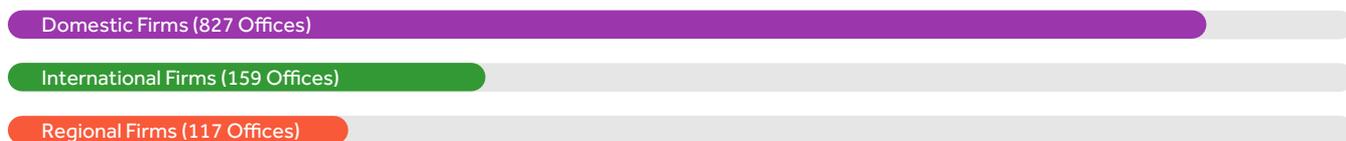
■ Number of Ranked Offices in 2014



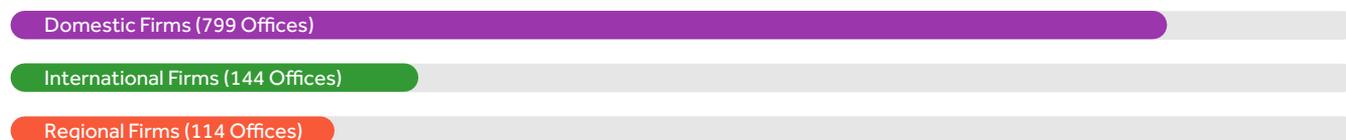
■ Number of Ranked Offices in 2017



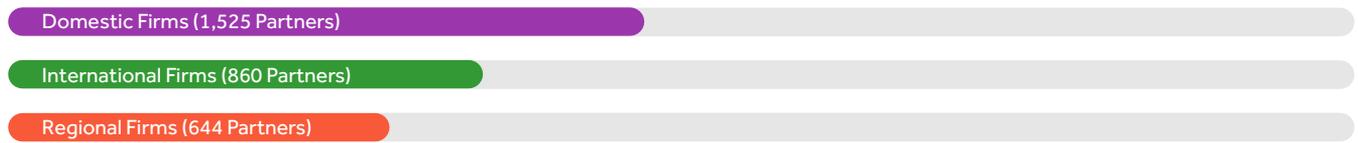
■ Number of Ranked Offices in 2019



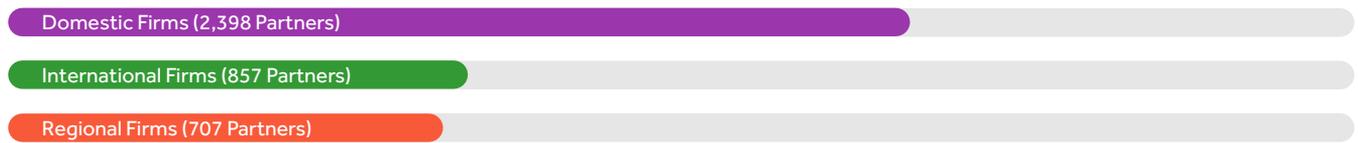
■ Number of Ranked Offices in 2021



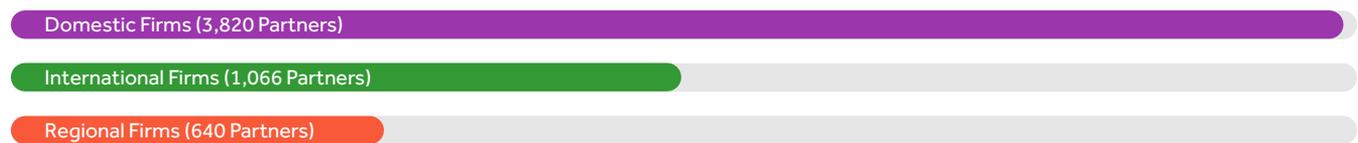
■ **Total Number of Partners at Ranked Firms in 2014**



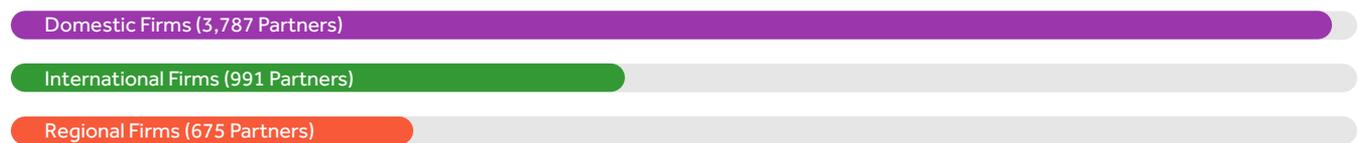
■ **Total Number of Partners at Ranked Firms in 2017**



■ **Total Number of Partners at Ranked Firms in 2019**



■ **Total Number of Partners at Ranked Firms in 2021**



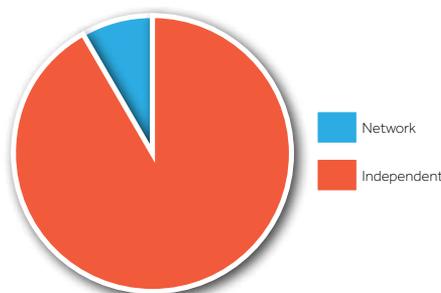
DOMESTICS IN CEE NETWORKS

Of the 799 Domestic ranked firms in the region, 65 joined a regional Network.

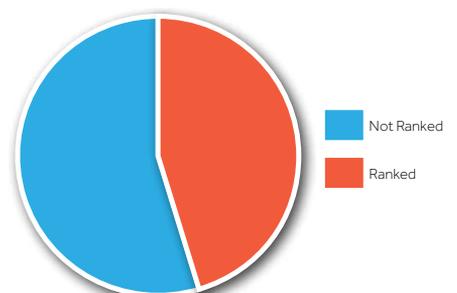
Looking at the full membership list of those regional Networks, they total 143 offices between 15 Networks.

Of those 143 offices, 65 are ranked and 78 are not.

**Ranked Domestic Firms:
Independent or in a Regional Network**



**Firms Within a Network:
Ranked or Not Ranked**



TOP HEAVY?





LAWYERS TO PARTNERS RATIO

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

Given the relatively small size of the markets and of the law firms working within them, it is perhaps not a big surprise that that ratio is lowest in Kosovo.

Comparing the current numbers to those across the three studies, North Macedonia is the only jurisdiction that seems to be more top-heavy in 2021 than in 2014, primarily due to a considerable drop in its ratio between 2017 and 2019.

Belarus, which currently holds the top spot in terms of the average number of lawyers to partners ratio (5.34) registered a steady growth on this metric.

In the period between 2019 and 2021, the countries with the most progress towards being less top-heavy were, in order, Latvia, Slovakia, Moldova, and Belarus.

Country	Average Number of Lawyers per Partner
Kosovo	1.90
Bosnia and Herzegovina	2.86
Albania	2.92
Austria	2.99
Slovenia	3.20
Croatia	3.22
Estonia	3.32
Moldova	3.57
Hungary	3.64
Greece	3.69
Bulgaria	3.73
Montenegro	3.80
North Macedonia	3.97
Lithuania	3.99
Serbia	4.12
Russia	4.15
Romania	4.19
Ukraine	4.57
Poland	4.62
Czech Republic	4.85
Turkey	4.91
Latvia	4.92
Slovakia	4.92
Belarus	5.34



The average number of lawyers per partner at ranked firms in CEE is 4.11. How does your firm compare? Let us know at press@ceelm.com along with any thoughts on this study.



Country	Lawyers Per Partner (2014)	Lawyers Per Partner (2017)	Lawyers Per Partner (2019)	2-Year Evolution	4-Year Evolution	7-Year Evolution
North Macedonia	4.09	5.32	3.58	0.39	-1.35	-0.12
Albania	2.38	2.6	2.58	0.34	0.32	0.54
Romania	3.61	3.8	4.1	0.09	0.39	0.58
Estonia	2.59	2.78	3.44	-0.12	0.54	0.73
Lithuania	2.98	3.35	3.57	0.42	0.64	1.01
Austria	1.94	2.2	3.07	-0.08	0.79	1.05
Croatia	2.08	3.27	3.33	-0.11	-0.05	1.14
Slovenia	2.02	2.54	3.8	-0.6	0.66	1.18
Bulgaria	2.53	2.7	3.24	0.49	1.03	1.2
Greece	2.46	3.06	3.23	0.46	0.63	1.23
Poland	3.01	4.17	3.98	0.64	0.45	1.61
Hungary	1.95	3.55	3.49	0.15	0.09	1.69
Serbia	2.31	3.33	4.14	-0.02	0.79	1.81
Latvia	2.77	3.37	3.55	1.37	1.55	2.15
Slovakia	2.55	3.69	3.63	1.29	1.23	2.37
Russia	1.77	4.09	3.94	0.21	0.06	2.38
Czech Republic	2.46	3.84	4.21	0.64	1.01	2.39
Turkey	1.98	4.02	4.36	0.55	0.89	2.93
Ukraine	1.44	4.81	4.36	0.21	-0.24	3.13
Belarus	2.14	3.41	4.31	1.03	1.93	3.2
Bosnia and Herzegovina	N/A	N/A	3.07	-0.21	N/A	N/A
Kosovo	N/A	N/A	2.33	-0.43	N/A	N/A
Moldova	N/A	N/A	2.33	1.24	N/A	N/A
Montenegro	N/A	N/A	2.95	0.85	N/A	N/A

7.9

the lawyers to partners ratio at Big 4 affiliated firms – highest of all types.

3.13

more lawyers per partner working at Ukrainian ranked law firms in 2021 compared to 2014

3.2

more lawyers per partner working at Belarusian ranked law firms in 2021 compared to 2014

0.46

more lawyers per partner working at ranked offices of international firms in 2021 than in 2014.

0.53

less lawyers per partner, on average, working at Domestic firms than at Regional firms, between 2014 and 2021.

0.79

less lawyers per partner, on average, working at Domestic firms than at International firms, between 2014 and 2021.

RATIO BY TYPE OF FIRM

Similarly to the 2019 *CEE by the Numbers* report, on average in CEE, the lawyers-to-partner ratio tends to be lower in Domestic firms (an average of 3.86), than in Regional (4.36) and International (4.91) firms.

Looking at the same data from the previous reports in 2014, 2017, and 2019, these ratios seem to fluctuate in a similar direction, irrespective of the type of firm, for the most part. The one deviation was Regional firms between 2021 and 2019.

However, the range of the fluctuation seems to be impacted by the type of firm we are looking at, with In-

ternational firms seemingly having a higher fluctuation. For example, while the ratio decreased for all between 2014 and 2017, it did so by 1 for Domestic firms and by 1.23 for International firms. The exact same values, just in reverse, were registered between 2017 and 2019, and, between 2019 and 2021, the ratio increased by only 0.2 in the case of Domestic firms, while increasing by 0.46 in the case of International firms.

The novel category for this edition of *CEE by the Numbers* – that of Domestic firms that are a part of a regional Network – seems to be the most top-heavy category with a lawyers-to-partner ratio of 3.26.

Domestic Firms (3.86 Lawyers per Partner)

Domestic Firms in a Network (3.26 Lawyers per Partner)

Regional Firms (4.36 Lawyers per Partner)

International Firms (4.91 Lawyers per Partner)

Country	Lawyers Per Partner (2014)	Lawyers Per Partner (2017)	Lawyers Per Partner (2019)	Lawyers Per Partner (2021)
Domestic	3.66	2.66	3.66	3.86
Regional	4.22	2.96	4.42	4.36
International	4.45	3.22	4.45	4.91

Country	2014 - 2017 Change	2017 - 2019 Change	2019 - 2021 Change	7-Year Evolution
Domestic	-1	1	0.2	0.2
Regional	-1.26	1.46	-0.06	0.14
International	-1.23	1.23	0.46	0.46

WOMEN IN LAW





FEMALE LAWYERS

The 2017 and 2019 CEE by the Numbers reports revealed that opportunities for women are plentiful with law firms in CEE. In 2019, women accounted for 55.4% of all lawyers at ranked firms in the region, including 74.77% of all lawyers at ranked firms in North Macedonia and over 60% of all lawyers at ranked firms in Moldova, Latvia, Romania, Montenegro, and Turkey. At the time, of the 24 CEE jurisdictions surveyed, only nine had fewer than 50% of all lawyer positions held by women.

In 2021 the converse is true: only nine of the surveyed jurisdictions have a percentage of female lawyers larger than 50%. Compared to 2017, 16 of the 20 markets where data was available registered a decrease in the number of female lawyers' percentages. Between 2021 and 2019, the percentage of female lawyers throughout CEE as a whole has dropped from 55.4% to 45.53%.

Romania is at the top of the table with 63.58% of the lawyers at ranked firms being women. On the other end, Ukraine's percentage is 34.08%, a drop of 8.42 percentage points over the last couple of years.

Albania has more than 30 percentage points less in 2021 than it did in 2017. Looking at the last couple of years, Moldova and North Macedonia lost most ground on this metric with 27.4 and 20.3 percentage points less, respectively.

Country	Number of Lawyers	Number of Female Lawyers	Female Lawyers Percentage
Romania	1,620	1,030	63.58%
Belarus	251	150	59.76%
Bosnia and Herzegovina	80	47	58.75%
Latvia	310	170	54.84%
Greece	1,342	732	54.55%
North Macedonia	123	67	54.47%
Slovenia	298	160	53.69%
Lithuania	635	338	53.23%
Bulgaria	623	313	50.24%
Turkey	2,655	1,326	49.94%
Montenegro	76	37	48.68%
Croatia	351	170	48.43%
Serbia	721	348	48.27%
Estonia	415	199	47.95%
Poland	3,622	1,653	45.64%
Hungary	907	392	43.22%
Kosovo	38	16	42.11%
Slovakia	709	298	42.03%
Moldova	75	29	38.67%
Austria	1,841	681	36.99%
Russia	2,788	1,016	36.44%
Czech Republic	1,504	547	36.37%
Albania	105	38	36.19%
Ukraine	1,338	456	34.08%



45.53%

of all CEE lawyers
at ranked offices
are women

Country	Female Lawyers Percentage (2017)	Female Lawyers Percentage (2019)	2-Year Evolution	4-Year Evolution
Albania	68.57%	39.78%	-3.59%	-32.38%
Croatia	63.54%	59.23%	-10.80%	-15.11%
Turkey	63.99%	60.18%	-10.24%	-14.05%
Russia	50.41%	44.42%	-7.98%	-13.97%
Ukraine	47.05%	42.50%	-8.42%	-12.97%
North Macedonia	66.67%	74.77%	-20.30%	-12.20%
Bulgaria	61.81%	57.39%	-7.15%	-11.57%
Estonia	55.89%	51.68%	-3.73%	-7.94%
Austria	44.71%	36.21%	0.78%	-7.72%
Czech Republic	43.19%	38.02%	-1.65%	-6.82%
Greece	60.87%	54.42%	0.13%	-6.32%
Slovenia	59.64%	55.73%	-2.04%	-5.95%
Belarus	64.71%	52.61%	7.15%	-4.95%
Slovakia	45.97%	47.68%	-5.65%	-3.94%
Poland	48.89%	44.58%	1.06%	-3.25%
Hungary	46.43%	43.74%	-0.52%	-3.21%
Romania	65.87%	63.37%	0.21%	-2.29%
Serbia	50.41%	53.78%	-5.51%	-2.14%
Latvia	53.74%	63.78%	-8.94%	1.10%
Lithuania	51.37%	55.00%	-1.77%	1.86%
Bosnia and Herzegovina	N/A	51.69%	7.06%	N/A
Kosovo	N/A	42.86%	-0.75%	N/A
Moldova	N/A	66.07%	-27.40%	N/A
Montenegro	N/A	62.50%	-13.82%	N/A

FEMALE ASSOCIATES

When looking at associates only, there are 15 jurisdictions where there are more female associates than male associates.

Kosovo jumps to the top spot with 72.22% of associates being women. In second place, Romania is still over the 60% mark but also increases its percentage from 63.58% to 68.13%. In fact, four jurisdictions have over 60% of their associate ranks filled up by women.

At the lower end of the table, both Russia and Ukraine have less than 40% women associates. Hungary, Croatia, Slovakia, Austria, Albania, Moldova, and the Czech Republic complete the list of markets with less than half of associates being women.

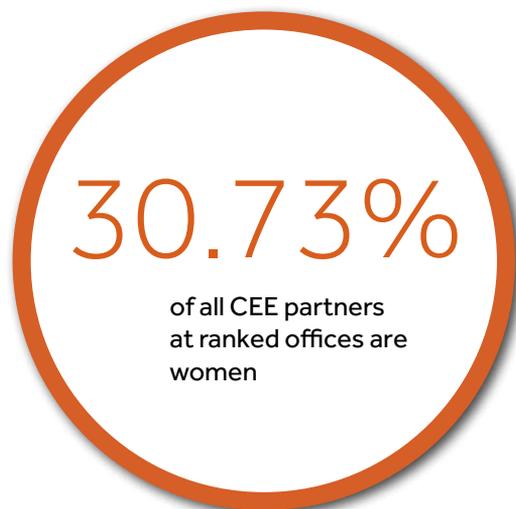
Country	Number of Associates	Number of Female Associates	Female Associates Percentage
Kosovo	18	13	72.22%
Romania	1,233	840	68.13%
Belarus	204	134	65.69%
Slovenia	205	130	63.41%
Greece	978	582	59.51%
Lithuania	476	282	59.24%
Montenegro	56	33	58.93%
North Macedonia	92	54	58.70%
Estonia	290	166	57.24%
Latvia	247	141	57.09%
Bosnia and Herzegovina	52	29	55.77%
Turkey	2,114	1,118	52.89%
Bulgaria	456	241	52.85%
Serbia	546	288	52.75%
Poland	2,838	1,450	51.09%
Hungary	658	327	49.70%
Croatia	242	116	47.93%
Slovakia	565	268	47.43%
Austria	1,225	571	46.61%
Albania	69	30	43.48%
Moldova	54	23	42.59%
Czech Republic	1,194	494	41.37%
Russia	2,117	841	39.73%
Ukraine	1,045	366	35.02%

50.29%

of all CEE associates
at ranked offices are
women

FEMALE PARTNERS

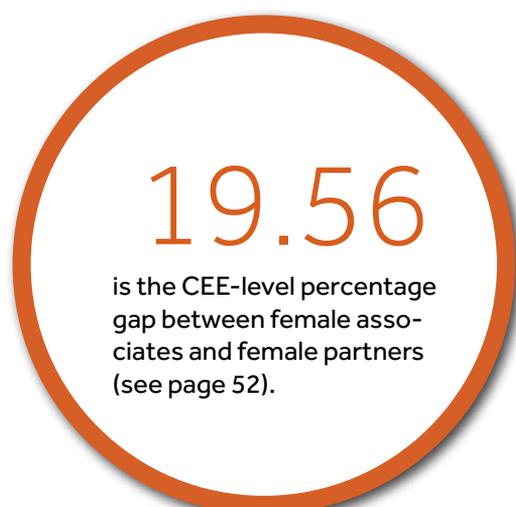
64.29% of the partners at ranked firms in Bosnia and Herzegovina are women. The country leads the way on this metric by a considerable margin since it is the only market in CEE with a female partnership percentage over 50% – although Croatia and Romania only narrowly missed the threshold.



Country	Number of Partners	Number of Female Partners	Female Partners Percentage
Bosnia and Herzegovina	28	18	64.29%
Croatia	109	54	49.54%
Romania	387	190	49.10%
Latvia	63	29	46.03%
Bulgaria	167	72	43.11%
North Macedonia	31	13	41.94%
Greece	364	150	41.21%
Turkey	541	208	38.45%
Lithuania	159	56	35.22%
Serbia	175	60	34.29%
Belarus	47	16	34.04%
Slovenia	93	30	32.26%
Ukraine	293	90	30.72%
Moldova	21	6	28.57%
Estonia	125	33	26.40%
Hungary	249	65	26.10%
Russia	671	175	26.08%
Poland	784	203	25.89%
Albania	36	8	22.22%
Slovakia	144	30	20.83%
Montenegro	20	4	20.00%
Austria	616	110	17.86%
Czech Republic	310	53	17.10%
Kosovo	20	3	15.00%

Of the 24 jurisdictions surveyed, 12 markets have an average percentage of female partners over the regional average of 30.73%. Ukraine just missed the line with its 30.72%.

Kosovo retains its last spot on the table while the Czech Republic dropped from the fourth-to-last spot to the second-to-last one, dropping from 21.33% in 2019 to 17.10% in 2021. In fact, the composition of the last four spots in the table remained the same between 2019 and 2021.



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.

Montenegro, which has a percentage of female lawyers of 48.68% only has a percentage of female partners of 20.00%, thus leading the way in the gap between the two metrics.

In contrast, in large part because Bosnia and Herzegovina and Croatia had the highest percentages of female partners at ranked law firms in CEE, those countries have a negative gap, with both having a higher percentage of female partners than that of female lawyers at ranked firms.

Ukraine, the country with the lowest percentage of female lawyers, has a very narrow gap between the two as well.

Of the jurisdictions surveyed, only five had a gap smaller than 10 percentage points, while 13 had a gap between 10 and 20 percentage points.

Overall for CEE, the average gap in 2021 is 19.56 percentage points, up from 19.02 in 2019.

Also telling are the associates to partner ratios within firms. In Montenegro, for example, firms have, on average, 1.44 male associates per male partner. In contrast, there are 8.25 female associates per female partner, resulting in a gap of ratios of 6.81. The Czech Republic, which was eighth in terms of the percentages gap, jumps to second place in the ratios gap with a ratio of 2.72 male associates to male partners contrasted to a ratio of 9.32 female associates to female partners.

Country	Female Lawyers to Female Partners Gap
Montenegro	28.68
Kosovo	27.11
Belarus	25.72
Estonia	21.55
Slovenia	21.43
Slovakia	21.20
Poland	19.74
Czech Republic	19.27
Austria	19.13
Lithuania	18.01
Hungary	17.11
Romania	14.48
Serbia	13.98
Albania	13.97
Greece	13.34
North Macedonia	12.54
Turkey	11.50
Russia	10.36
Moldova	10.10
Latvia	8.81
Bulgaria	7.13
Ukraine	3.36
Croatia	-1.11
Bosnia and Herzegovina	-5.54

Country	Male Associates to Male Partners Ratio	Female Associates to Female Partners Ratio	Ratios Gap
Montenegro	1.44	8.25	6.81
Czech Republic	2.72	9.32	6.6
Slovakia	2.61	8.93	6.33
Belarus	2.26	8.38	6.12
Poland	2.39	7.14	4.75
Kosovo	0.29	4.33	4.04
Austria	1.29	5.19	3.9
Estonia	1.35	5.03	3.68
Hungary	1.8	5.03	3.23
Lithuania	1.88	5.04	3.15
Slovenia	1.19	4.33	3.14
Serbia	2.24	4.8	2.56
Romania	1.99	4.42	2.43
Turkey	2.99	5.38	2.38
Albania	1.39	3.75	2.36
Russia	2.57	4.81	2.23
North Macedonia	2.11	4.15	2.04
Greece	1.85	3.88	2.03
Moldova	2.07	3.83	1.77
Latvia	3.12	4.86	1.74
Bulgaria	2.26	3.35	1.08
Ukraine	3.34	4.07	0.72
Croatia	2.29	2.15	-0.14
Bosnia and Herzegovina	2.3	1.61	-0.69

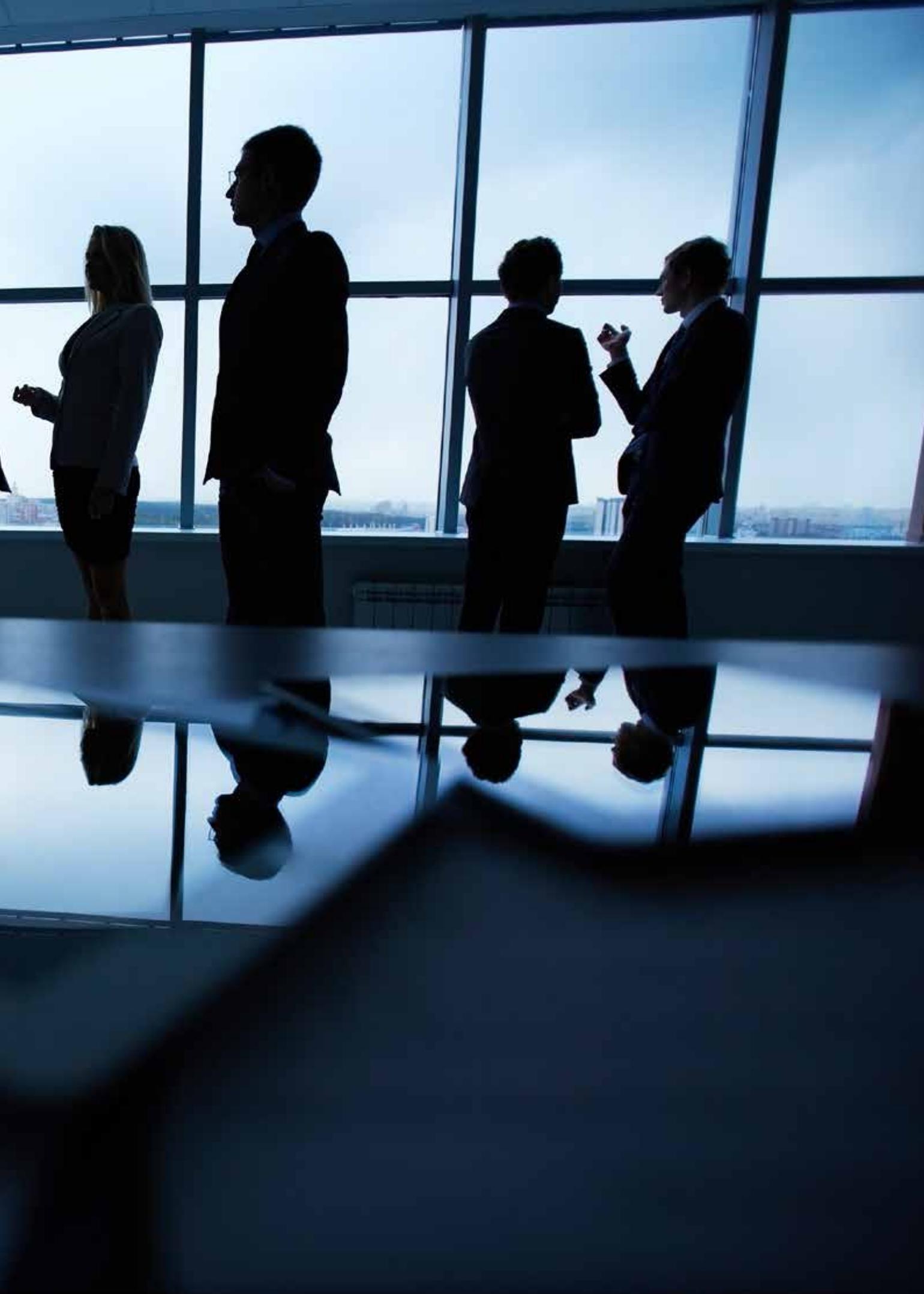
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jurisdictions only have a ratios gap of less than one.



LARGEST TEAMS





■ Albania

#	Firm	Number of Lawyers	Number of Partners
1	Tashko Pustina	20	5
2	Deloitte Legal	16	1
3	Hodaj & Partners	13	4
4	Kalo & Associates	12	7
5	Hoxha, Memi & Hoxha	10	3

■ Belarus

#	Firm	Number of Lawyers	Number of Partners
1	Revera	55	2
2	Sorainen	27	3
3	Stepanovski, Papakul And Partners	27	3
4	SBH	21	3
5	Verkhovodko & Partners	19	6

■ Bulgaria

#	Firm	Number of Lawyers	Number of Partners
1	Djingov, Gouginski, Kyutchukov & Velichkov	55	15
2	Popov, Arnaudov & Partners Law Office	35	8
3	Dimitrov, Petrov & Co	32	11
4	CMS	31	6
5	Kambourov & Partners	30	15

■ Czech Republic

#	Firm	Number of Lawyers	Number of Partners
1	Havel & Partners	182	25
2	Deloitte Legal	87	11
3	Rowan Legal	70	9
4	PRK Partners	62	14
5	Dentons	61	13

■ Austria

#	Firm	Number of Lawyers	Number of Partners
1	Schoenherr	151	36
2	Wolf Theiss	131	37
3	Cerha Hempel	83	25
4	Dorda	83	22
5	Binder Grosswang	81	25

■ Bosnia and Herzegovina

#	Firm	Number of Lawyers	Number of Partners
1	Maric & Co Law Firm	14	6
2	Sajic Advokatska Firma	13	4
3	CMS	9	3
4	Karanovic & Partners	8	1
5	■ Dimitrijevic & Partners ■ Wolf Theiss	7 7	3 1

■ Croatia

#	Firm	Number of Lawyers	Number of Partners
1	CMS	23	7
2	Hanzekovic & Partners	23	5
3	Savoric & Partners	22	5
4	Mamic Peric Reberski Rimac Law Firm	19	4
5	Madirazza & Partners	17	6

■ Estonia

#	Firm	Number of Lawyers	Number of Partners
1	Cobalt	69	12
2	TGS Baltic	47	8
3	Walless	30	9
4	Lextal	30	10
5	Eversheds Sutherland	30	6

■ Greece

#	Firm	Number of Lawyers	Number of Partners
1	Potamitisvekris	72	11
2	Watson Farley & Williams	54	10
3	Bernitsas Law	50	11
4	Koutalidis Law Firm	49	11
5	■ Kyriakides	42	18
	Georgopoulos		
	■ Karatzas & Partners	42	9

■ Kosovo

#	Firm	Number of Lawyers	Number of Partners
1	Kalo & Associates	12	7
2	Kerveshi & Partners	9	4
3	RPHS Law	8	4
4	Vokshi & Lata Law Firm	5	3
5	Pallaska & Associates	4	2

■ Lithuania

#	Firm	Number of Lawyers	Number of Partners
1	Ellex	100	19
2	Cobalt	87	18
3	TGS Baltic	66	15
4	Walless	52	12
5	Glimstedt	42	9

■ Montenegro

#	Firm	Number of Lawyers	Number of Partners
1	Jovovic, Mugosa & Vukovic	25	4
2	NKO Partners	13	3
3	CMS	12	2
4	Dokleštic Repic & Gajin	6	3
5	BDK Advokati	5	1

■ Hungary

#	Firm	Number of Lawyers	Number of Partners
1	CMS	53	12
2	Lakatos, Koves And Partners	52	9
3	Oppenheim	52	33
4	DLA Piper	46	12
5	Baker Mckenzie	44	8

■ Latvia

#	Firm	Number of Lawyers	Number of Partners
1	Cobalt	46	8
2	Sorainen	45	7
3	Ellex	38	8
4	TGS Baltic	29	7
5	BDO	25	3

■ Moldova

#	Firm	Number of Lawyers	Number of Partners
1	Turcan Cazac	17	7
2	ACI Partners	14	5
3	Efrim Rosca & Asociatii	12	2
4	Gladei & Partners	12	2
5	Cobzac & Partners	9	1

■ North Macedonia

#	Firm	Number of Lawyers	Number of Partners
1	Polenak Law Firm	20	4
2	Trpenoski	17	1
3	Pepeljugoski	15	3
4	Cakmakova Advocates	12	5
5	Karanovic & Partners	10	1

■ Poland

#	Firm	Number of Lawyers	Number of Partners
1	Dentons	194	39
2	Domanski Zakrzewski Palinka	180	37
3	Soltysinski Kawecki & Szlezak	167	26
4	Wardynski & Partners	142	36
5	Baker Mckenzie	127	15

■ Russia

#	Firm	Number of Lawyers	Number of Partners
1	Egorov Puginsky Afanasiev & Partners	194	29
2	Dentons	147	31
3	Baker Mckenzie	136	32
4	DLA Piper	131	19
5	Bryan Cave Leighton Paisner	115	17

■ Slovakia

#	Firm	Number of Lawyers	Number of Partners
1	Soukenik – Strpka	59	5
2	Havel & Partners	35	7
3	Relevans Law Firm	34	5
4	Allen & Overy	27	3
5	■ Barger Prekop ■ Taylor Wessing	26 26	6 5

■ Turkey

#	Firm	Number of Lawyers	Number of Partners
1	Herguner Bilgen oezeke	93	17
2	Balcioglu Selcuk Ardiyok Keki (Dentons)	86	16
3	Esin Attorney Partnership (Baker Mckenzie)	85	14
4	Egemenoglu Law Firm	75	5
5	Gun + Partners	67	11

■ Romania

#	Firm	Number of Lawyers	Number of Partners
1	Nestor Nestor Diculescu Kingston Petersen	128	32
2	Tuca Zbarcea & Asociatii	114	27
3	Musat & Asociatii	66	13
4	Popovici Nitu Stoica & Asociatii	65	15
5	Reff & Associates (Deloitte Legal)	62	7

■ Serbia

#	Firm	Number of Lawyers	Number of Partners
1	Aleksic and Associates Law Office	72	7
2	Karanovic & Partners	67	15
3	Vukovic & Partners	43	4
4	Zivkovic Samardzic Law Office	41	12
5	Schoenherr	37	13

■ Slovenia

#	Firm	Number of Lawyers	Number of Partners
1	Rojs, Peljhan, Prelesnik & Partnerji	32	11
2	Jadek & Pensa	31	10
3	Senica & Partners	31	6
4	Selih & Partnerji	28	11
5	CMS	19	3

■ Ukraine

#	Firm	Number of Lawyers	Number of Partners
1	Asters	142	26
2	Sayenko Kharenko	130	20
3	Vasil Kisil & Partners	65	10
4	Baker Mckenzie	55	9
5	Ilyashev & Partners	53	6

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