

CEE

YEAR 4, ISSUE 10

SPECIAL ISSUE

LEGAL MATTERS

CEE BY THE NUMBERS





C/M/S/

Law.Tax

CMS tops M&A rankings again

2016 as well as the first half of 2017** was another outstanding period for CMS' Corporate / M&A group, with excellent M&A rankings across Europe by deal count. With over 300 deals, CMS advised on more transactions than any other law firm in Europe.

#1 in CEE
in Europe
in France
in Germany*
in UK

source: Bloomberg, *Bloomberg, Mergermarket and Thomson Reuters

**Bloomberg, Mergermarket in CEE and Bloomberg, Thomson Reuters in Europe

Your World First
cms.law

Foreword and Methodology



This is CEE Legal Matters' second CEE By the Numbers report, following the successful introduction of the report (then called the "Glass CEELing" report) back in 2014. The fact that it's the second report is significant, because it allows us not only to track and report on important data about the law firms and legal markets of CEE, but also to assess how that data has changed since we first carried out the exercise three years ago. The results, we believe, are revealing and encouraging. We hope the contents of this report are both interesting and useful to our readers, who can expect

to see data from this special report cited in articles in the CEE Legal Matters magazine for years to come.

We are grateful to those firms that took the time to respond to our inquiries on the matter. We look forward to hearing (and publishing, if possible) your feedback.

Methodology

The data in this report was gathered from the websites of 486 law firms (with a total of 686 offices) ranked by Chambers & Partners and Legal 500 – in any practice area – across 20 CEE jurisdictions: Albania, Austria, Belarus, Bulgaria, Croatia, Czech Republic, Estonia, Greece, Hungary, Latvia, Lithuania, Macedonia, Poland, Romania, Russia, Serbia, Slovakia, Slovenia, Turkey, and Ukraine.

The remaining countries in CEE had too few ranked firms with useful websites, and were thus excluded as providing insufficient data. In addition, those ranked law firms failing to distinguish between partners and associates on their websites or which do not list their associates were excluded from consideration. Firms with fewer than five lawyers were also excluded.

Definitions

For the purpose of the survey, "associates" means any lawyer not identified as partner (i.e., junior associate, associate, senior associate, (of) counsel, attorney, etc.).

"Regional" law firms are those that are headquartered in CEE or the immediate vicinity (e.g. Germany) and have offices in at least three CEE countries. Firms with offices only in two neighboring jurisdictions (such as those with only offices in the Czech Republic and Slovakia, or in Serbia and Montenegro) were categorized as "National."

"International" law firms are those with headquarters outside of CEE but with at least one office in the region.

Data was collected from law firm websites between October 11, 2017 and October 17, 2017, and each firm was contacted and invited to confirm or update the data collected.

Throughout the report the survey results were compared to data collected in preparation for the "Glass CEELing" report, published in the April 2014 issue of the CEE Legal Matters magazine.

In This Report:

Legal Market Size	4	Top Heavy?	34
Legal Market Saturation	14	Women in Law	42
International, Regional, and National Firms	22	Largest Firms	52

LEGAL MARKET SIZE





Number of Law Firms

Which CEE country has the most law firms ranked by Chambers & Partners and Legal 500? Turkey, with 70 such firms, leads by a comfortable margin. Poland and Russia compete for the second spot while Albania, with only ten ranked firms, pulls up the rear.

This analysis provides insight on the number of recognized firms competing for high-end work each CEE country.

Country	Number of Ranked Firms
Turkey	70
Poland	59
Russia	57
Romania	46
Czech Republic	43
Greece	42
Austria	41
Bulgaria	39
Hungary	39
Ukraine	39
Serbia	31
Croatia	26
Slovakia	26
Lithuania	22
Estonia	21
Latvia	21
Slovenia	14
Belarus	13
Macedonia	12
Albania	10



Number of Firms Evolution

We compared the number of firms listed in the 2014 rankings to this year's number. Turkey led here as well, expanding from 30 ranked firms in March 2014 to 70 in October 2017. While that country expanded its number of ranked firms by 40, Romania and Poland registered growth of 21 and 20 firms, respectively. In fact, the number of ranked firms expanded across the entire region, with more than half of the 24 CEE markets seeing over ten additional firms included, and with only Slovakia and Estonia registering a decrease in the total number of ranked firms. The significance of this trend, of course, is debatable. This could reflect an increase in the number of skilled practitioners, a result of high-level split-offs, or simply greater scrutiny and market awareness – or a strategic decision based on other factors – by the ranking services themselves.

Country	Number of Ranked Firms in 2014	Number of Ranked Firms in 2017	Change
Turkey	30	70	40
Romania	25	46	21
Poland	39	59	20
Croatia	9	26	17
Bulgaria	23	39	16
Serbia	15	31	16
Greece	27	42	15
Ukraine	27	39	12
Hungary	28	39	11
Russia	47	57	10
Austria	31	41	10
Czech Republic	39	43	4
Lithuania	19	22	3
Latvia	18	21	3
Belarus	10	13	3
Macedonia	9	12	3
Slovenia	12	14	2
Albania	8	10	2
Slovakia	28	26	-2
Estonia	24	21	-3

Number of Lawyers

A similar growth trend can be discerned in looking at the total number of lawyers at ranked firms as well, with every country except Albania (where the number has shrunk) seeing an increase.

Poland leads the way with a total increase of 987 lawyers at ranked firms, while Turkey shows an additional 714 lawyers.

Country	Total Number of Lawyers in 2014	Total Number of Lawyers in 2017	Change
Poland	1553	2540	987
Turkey	393	1107	714
Romania	835	1263	428
Russia	1150	1544	394
Ukraine	332	669	337
Croatia	114	385	271
Hungary	457	726	269
Greece	630	886	256
Austria	1143	1394	251
Serbia	311	500	189
Bulgaria	402	571	169
Czech Republic	873	1038	165
Lithuania	486	641	155
Latvia	268	379	111
Slovenia	178	231	53
Slovakia	284	323	39
Belarus	110	143	33
Estonia	417	444	27
Macedonia	117	134	17
Albania	88	59	-29

Average Size of Law Firms

Poland, with an average of 43.05 lawyers per ranked law firm, leads the way in this category as well. Austria follows with an average of 34 lawyers per ranked firm, while Turkey, which has the most ranked law firms in CEE (see p. 4) is in the second half of this table, with an average of 15.81 lawyers per ranked firm.

Only eight of the 20 surveyed markets had an average ranked law firm size of over 20 lawyers, with almost all the rest having an average size between 10 and 20 lawyers.

Albania, with an average of 5.9, is the only market examined that had less than ten lawyers per ranked firm.

Country	Number of Ranked Firms
Poland	43.05
Austria	34.00
Lithuania	29.14
Romania	27.46
Russia	27.09
Czech Republic	24.14
Estonia	21.14
Greece	21.10
Hungary	18.62
Latvia	18.05
Ukraine	17.15
Slovenia	16.50
Serbia	16.13
Turkey	15.81
Croatia	14.81
Bulgaria	14.64
Slovakia	12.42
Macedonia	11.17
Belarus	11.00
Albania	5.90



Changing Team Sizes

Comparing this year's data to that from 2014, it becomes clear that most CEE jurisdictions have seen an increase in the average team sizes of ranked law firms as well, with only seven markets registering a decrease in the average number of fee earners.

Country	Average Number of Lawyers at Ranked Firms (2014)	Average Number of Lawyers at Ranked Firms (2017)	Change
Romania	33.40	27.46	-5.94
Albania	11.00	5.90	-5.10
Serbia	20.73	16.13	-4.60
Austria	36.87	34.00	-2.87
Bulgaria	17.48	14.64	-2.84
Greece	23.33	21.10	-2.24
Macedonia	13.00	11.17	-1.83
Belarus	11.00	11.00	0.00
Slovenia	14.83	16.50	1.67
Czech Republic	22.38	24.14	1.75
Croatia	12.67	14.81	2.14
Slovakia	10.14	12.42	2.28
Hungary	16.32	18.62	2.29
Russia	24.47	27.09	2.62
Turkey	13.10	15.81	2.71
Latvia	14.89	18.05	3.16
Poland	39.82	43.05	3.23
Lithuania	25.58	29.14	3.56
Estonia	17.38	21.14	3.77
Ukraine	12.30	17.15	4.86

While the data would appear to support the conclusion that firms in Romania are streamlining whereas those in Ukraine are bulking up, the real explanation is more nuanced. A more accurate understanding of firm evolutions in a specific market requires consideration of the change in average team sizes weighed against the increase or decrease of the number of firms present (see table on page 11).

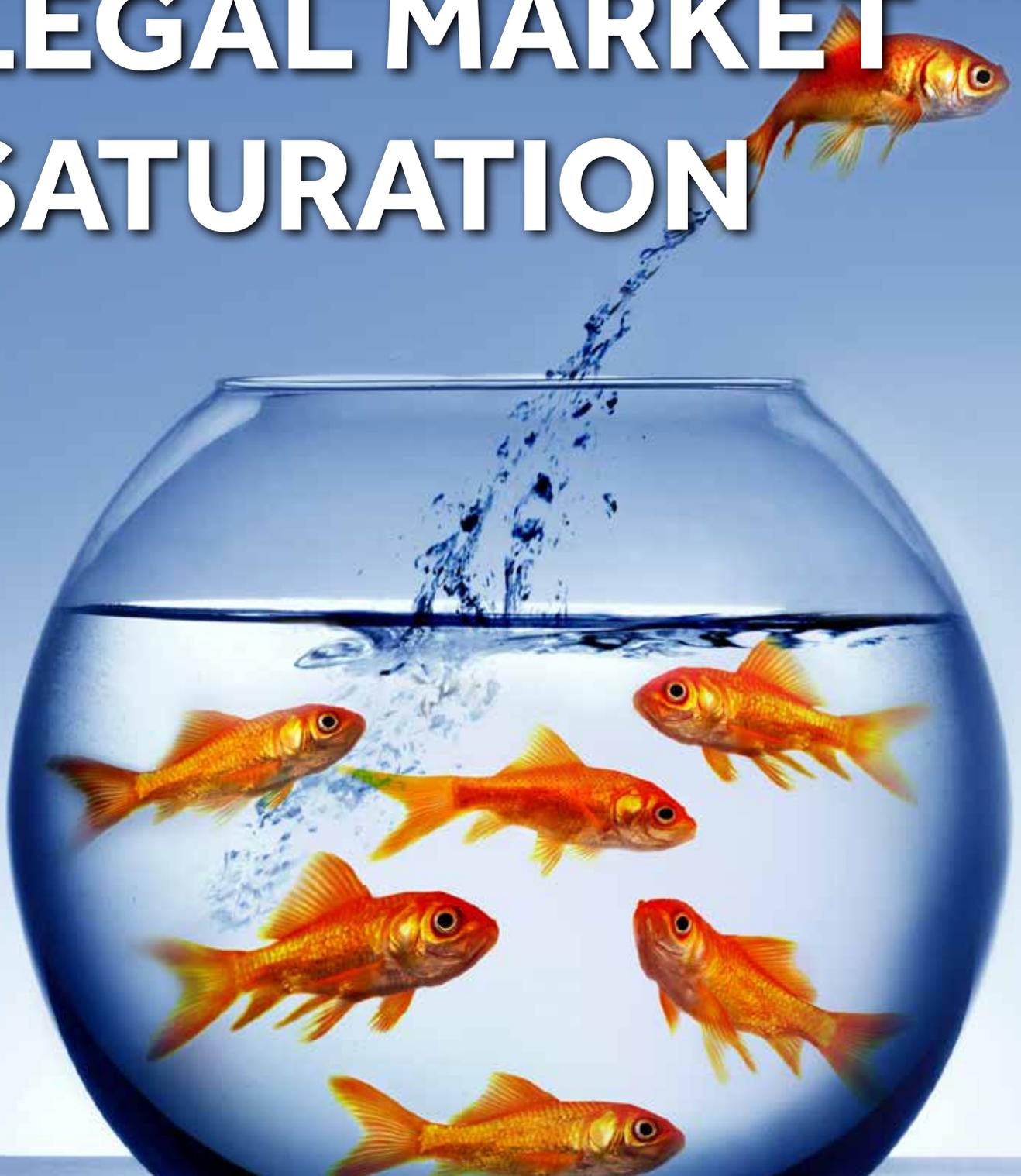
Size vs Number of Firms

Looking at the two data sets in parallel shows that the average size of ranked law firms in Albania has decreased considerably, while the country registered only a minor increase in the number of firms. This suggests that firms have downsized in that market. In contrast, while the number of ranked firms in Romania and Serbia has increased considerably, the average size has decreased at the highest level in the region, suggesting that the smaller firms have pushed their way into the rankings.

Inversely, a decrease in the number of firms but an increase in the average number of lawyers, as seen in Estonia, for instance, seems to indicate consolidating legal market.

Country	Change in the Number of Ranked Law Firms	Change In The Average Number of Lawyers Working at Ranked Firms
Romania	21	-5.94
Albania	2	-5.10
Serbia	16	-4.60
Austria	10	-2.87
Bulgaria	16	-2.84
Greece	15	-2.24
Macedonia	3	-1.83
Belarus	3	0.00
Slovenia	2	1.67
Czech Republic	4	1.75
Croatia	17	2.14
Slovakia	-2	2.28
Hungary	11	2.29
Russia	10	2.62
Turkey	40	2.71
Latvia	3	3.16
Poland	20	3.23
Lithuania	3	3.56
Estonia	-3	3.77
Ukraine	12	4.86

LEGAL MARKET SATURATION





Number of Firms / GDP

One method of assessing the level of saturation in each market is to compare the number of ranked firms in each market to that country's GDP (according to the World Bank in 2016).

When seen through this lens, Macedonia appears to be the most crowded market, with Russia being least crowded.

Country	GDP (Source: World Bank 2016)	Number of Ranked Firms to GDP Ratio
Macedonia	10,899	908.25
Estonia	23,136	1,101.71
Albania	11,926	1,192.60
Serbia	37,745	1,217.58
Latvia	27,677	1,317.95
Bulgaria	52,395	1,343.46
Croatia	50,425	1,939.42
Lithuania	42,738	1,942.64
Ukraine	93,270	2,391.54
Slovenia	43,990	3,142.14
Hungary	124,342	3,188.26
Slovakia	89,551	3,444.27
Belarus	47,433	3,648.69
Romania	186,690	4,058.48
Czech Republic	192,924	4,486.60
Greece	194,558	4,632.33
Poland	469,508	7,957.76
Austria	386,427	9,425.05
Turkey	857,748	12,253.54
Russia	1,283,162	22,511.61



Number of Lawyers / GDP

When contrasting the number of lawyers working for ranked law firms in each jurisdiction to that country's GDP, instead of the number of firms, the least saturated two markets remain the same: Russia and Turkey.

The Baltic countries of Estonia, Lithuania, and Latvia, however, move up the table to take the first three spots, as most crowded.

Country	GDP (Source: World Bank 2016)	Number of Lawyers working at Ranked Firms to GDP Ratio
Estonia	23,136	52.11
Lithuania	42,738	66.67
Latvia	27,677	73.03
Serbia	37,745	75.49
Macedonia	10,899	81.34
Bulgaria	52,395	91.76
Croatia	50,425	130.97
Ukraine	93,270	139.42
Romania	186,690	147.81
Hungary	124,342	171.27
Poland	469,508	184.85
Czech Republic	192,924	185.86
Slovenia	43,990	190.43
Albania	11,926	202.14
Greece	194,558	219.59
Austria	386,427	277.21
Slovakia	89,551	277.25
Belarus	47,433	331.70
Turkey	857,748	774.84
Russia	1,283,162	831.06

MARAVELA | ASOCIAȚII

"I had made the same request from over 20 law firms in the past 15 years and your law firm made the most comprehensive and best analysis"

Partner of a U.S. based law firm

"A reliable team providing a high standard of work"

Clients quoted by Chambers and Partners

"The lawyers always provide valuable feedback, and solve all issues no matter the field or degree of difficulty"

Clients quoted by IFLR 1000

"Maravela & Asociații has high standards of quality and professionalism"

Clients quoted by The Legal 500



Number of Firms / Deals

Another way of evaluating how crowded a market is is to consider the number of ranked firms to the number of deals reported in the country by CEE Legal Matters in 2014, 2015, and 2016.

When seen through this lens, Albania would seem to be the most saturated (with Macedonia remaining in the top two) and Poland the least saturated. Russia, here, moves up to number seven.

Country	Reported Client Matters (2014-2016)	Ratio of Number of Ranked Firms to Reported Client Matters
Albania	20	2.50
Macedonia	25	2.78
Greece	90	3.33
Slovakia	144	5.14
Belarus	71	7.10
Bulgaria	165	7.17
Russia	342	7.28
Croatia	67	7.44
Hungary	212	7.57
Slovenia	101	8.42
Serbia	130	8.67
Turkey	264	8.80
Czech Republic	368	9.44
Estonia	242	10.08
Latvia	183	10.17
Austria	371	11.97
Romania	352	14.08
Lithuania	294	15.47
Ukraine	455	16.85
Poland	694	17.79

Number of Lawyers / Deals

When contrasting the number of lawyers working for ranked law firms in each jurisdiction to the number of deals in that country, instead of the number of firms, Greece and Croatia appear least saturated, while Belarus, Estonia, and Ukraine appear most saturated.

Country	Reported Client Matters (2014-2016)	Ratio of Number of Lawyers working at Ranked Firms to Reported Client Matters	
Greece	90	0.10	
Croatia	67	0.17	
Macedonia	25	0.19	
Russia	342	0.22	
Turkey	264	0.24	
Serbia	130	0.26	
Austria	371	0.27	
Poland	694	0.27	
Romania	352	0.28	
Bulgaria	165	0.29	
Hungary	212	0.29	
Albania	20	0.34	
Czech Republic	368	0.35	
Slovenia	101	0.44	
Slovakia	144	0.45	
Lithuania	294	0.46	
Latvia	183	0.48	
Belarus	71	0.50	
Estonia	242	0.55	
Ukraine	455	0.68	



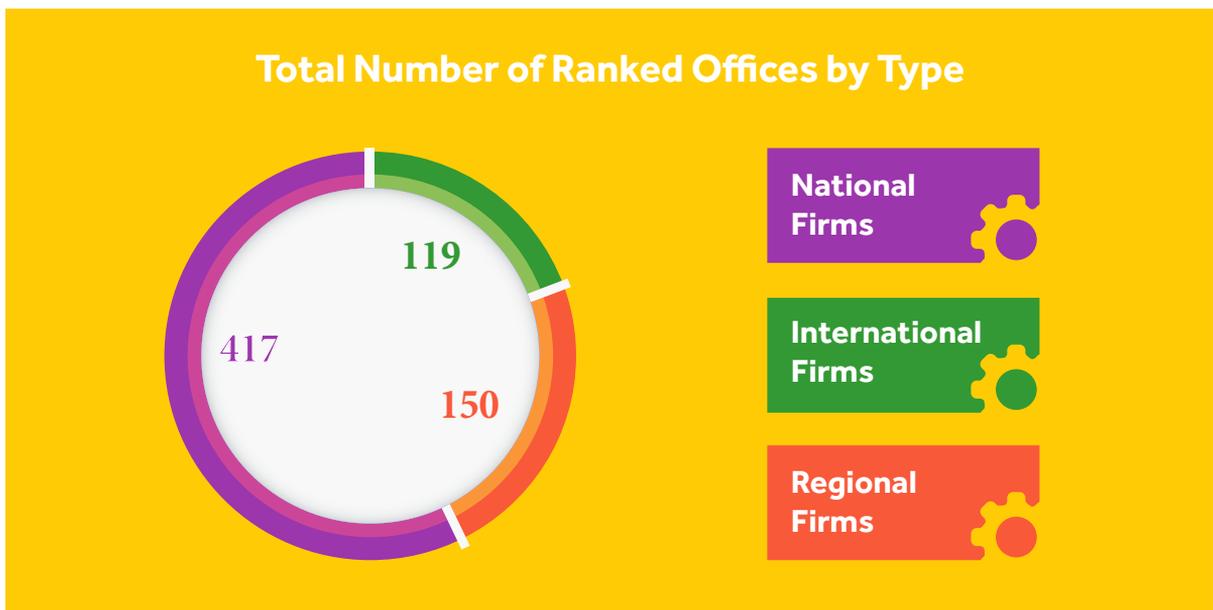
INTERNATIONAL, REGIONAL, AND NATIONAL FIRMS



CEE Overview: Kinds of Firms

Of the 486 law firms ranked across the surveyed countries, 414 represented national firms, 40 international firms, and 32 were regional law firms with offices in at least 3 jurisdictions.

While less in number, regional firms have a higher average of offices (4.68 offices) in CEE when compared to their international counterparts (2.97 offices), which pushes regional players ahead in terms of the total number of offices established in CEE: 150 total offices compared to the 119 of international firms.



Regional Firms in CEE

The Baltic states lead the way in terms of the number of regional firms present on the ground with the numbers in all three jurisdictions being heavily influenced by the presence of pan-baltic law firms. In Latvia, such firms represent 17 out of the 20 total ranked law firms.

In contrast, while Greece has a notable international firm presence, primarily as a result of its shipping industry, it has drawn little attention from regional firms.

Country	Number of Ranked Regional Offices
Latvia	17
Estonia	15
Lithuania	14
Czech Republic	9
Hungary	9
Romania	9
Russia	9
Ukraine	9
Belarus	8
Bulgaria	7
Poland	7
Serbia	6
Slovakia	6
Austria	5
Croatia	5
Slovenia	5
Macedonia	4
Turkey	4
Albania	3
Greece	2

International Firms in CEE

Although Russia ranked mid-table in terms of Regional firm presence, it leads the way in the number of International firms on the ground.

The Baltic states dropped in this ranking with only one International firm (Eversheds Sutherland) operating in each of the three, while Belarus and Macedonia are the only two jurisdictions covered in this report without any International firm offices.

Country	Number of Ranked International Offices
Russia	26
Poland	19
Hungary	13
Czech Republic	11
Slovakia	8
Turkey	8
Austria	7
Greece	6
Romania	6
Ukraine	5
Croatia	2
Albania	1
Bulgaria	1
Estonia	1
Latvia	1
Lithuania	1
Serbia	1
Slovenia	1
Belarus	0
Macedonia	0



DRAKOPOULOS

LAW FIRM

11 Countries
1 Instruction
1 Invoice

Reliable Legal Support
Across SEE



International Firm Coverage

CMS, which has offices in Albania, Austria, Bosnia & Herzegovina, Bulgaria, Croatia, Czech Republic, Hungary, Montenegro, Poland, Romania, Russia, Serbia, Slovakia, Slovenia, Turkey, and Ukraine, is the International firm with the largest on-the-ground coverage in CEE.

Clifford Chance, White & Case, and Squire Patton Boggs each have five offices in the region. Multiple firms have only one office in the region, usually in Moscow.

Country	Number of Countries	Number of Lawyers
CMS	16	537
Dentons	8	476
DLA Piper	8	214
Eversheds Sutherland	8	171
Baker McKenzie	7	209
Allen & Overy	7	160
Taylor Wessing	6	105
Clifford Chance	5	165
White & Case	5	164
Squire Patton Boggs	5	77

Regional Firm Coverage

Wolf Theiss is the ranked Regional firm with a physical presence in most CEE jurisdictions, with offices in Albania, Austria, Bosnia & Herzegovina, Bulgaria, Croatia, Czech Republic, Hungary, Poland, Romania, Serbia, Slovakia, Slovenia, and Ukraine.

At the request of another Regional firm, it was excluded from the list.

Country	Number of Countries	Number of Lawyers
Wolf Theiss	13	297
Petosevic	12	74
bnt	9	92
Kinstellar	8	120
CHSH	7	165
SCWP Schindhelm	7	121
Karanovic & Nikolic	6	68
CEE Attorneys	6	61
Magnusson	5	84
Law Firm Efthymios G. Navridis & Associates	5	18

Market Breakdown by Type

Again as the result of the 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 National firms. Despite the large number of International firms present, Russia follows closely behind.

Turkey and Greece share the last spot on the table with a large percentage of the ranked firms being National. Indeed, out of the additional 40 ranked firms that Turkey registered in the last three years, 38 were National.

Country	Percentage of Ranked Firms that are Regional or International
Latvia	86%
Estonia	76%
Lithuania	68%
Belarus	62%
Russia	61%
Hungary	56%
Slovakia	54%
Czech Republic	47%
Poland	44%
Slovenia	43%
Albania	40%
Ukraine	36%
Macedonia	33%
Romania	33%
Austria	29%
Croatia	27%
Serbia	23%
Bulgaria	20%
Turkey	17%
Greece	17%

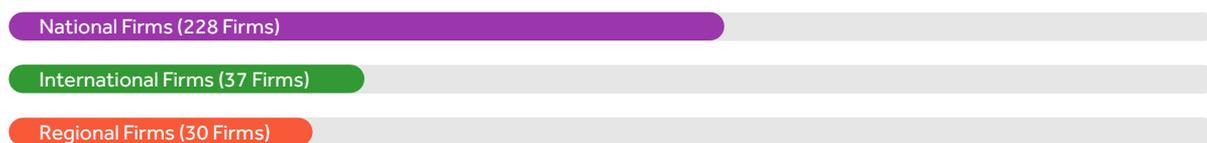


Local Firms Gaining Ground

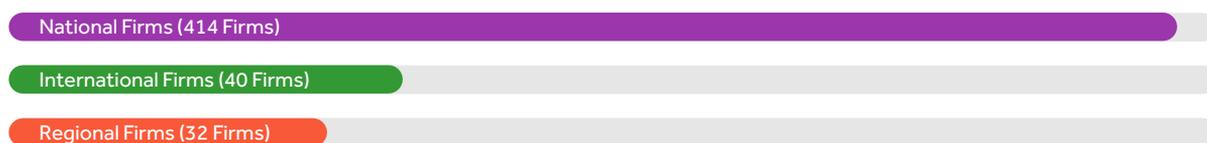
Since 2014 the number of International and Regional firms has increased only marginally (from 37 to 40 and from 30 to 32 respectively), whereas the number of ranked National firms has almost doubled.

In terms of offices and the number of partners working at the firms, the same difference in growth between National and Regional was recorded, but International firms have decreased their presence from 127 to 119 offices in CEE and from 860 partners to 857 partners.

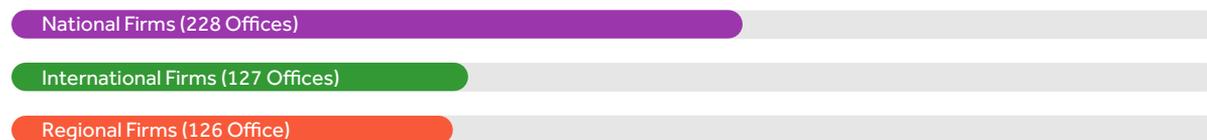
Number of Firms in 2014



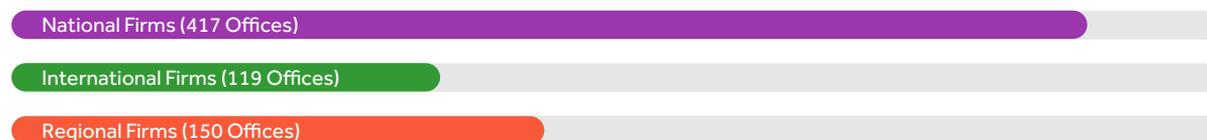
Number of Firms in 2017



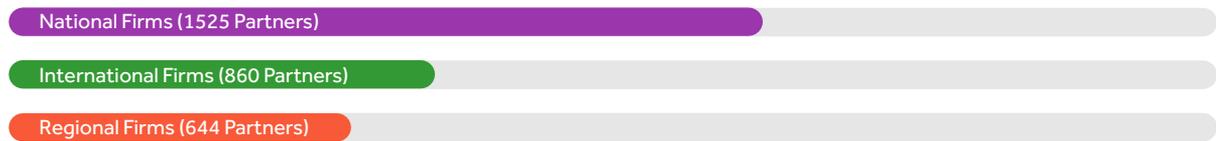
Number of Offices (2014)



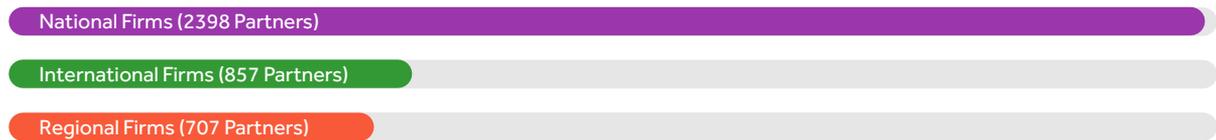
Number of Offices (2017)



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



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



Type of Firm	Number of Firms (2014)	Number of Firms (2017)	Number of Offices (2014)	Number of Offices (2017)	Total Number of Partners (2014)	Total Number of Partners (2017)
National	228	414	228	417	1525	2398
Regional	30	32	126	150	644	707
International	37	40	127	119	860	857

What do you expect from your law firm?
wolftheiss.com



TOP HEAVY?





Associates to Partner Ratio

In order to better understand the seniority structures of law firms across CEE we calculated the average ratio of associates to partners (i.e., on average, the number of associates at each law firm relative to the number of partners).

The survey shows that Austria firms have the lowest number, while Poland, which has the highest number of lawyers working for ranked law firms, also has one of the highest associate to partner ratios.

Country	Average Ratio of Associates to Partner
Austria	2.20
Slovenia	2.54
Albania	2.60
Bulgaria	2.70
Estonia	2.78
Greece	3.06
Croatia	3.27
Serbia	3.33
Lithuania	3.35
Latvia	3.37
Belarus	3.41
Hungary	3.55
Slovakia	3.69
Romania	3.80
Czech Republic	3.84
Turkey	4.02
Russia	4.09
Poland	4.17
Ukraine	4.81
Macedonia	5.32



Ratio by Type of Firm

On average in CEE the associates to partner ratio tends to be lower in National firms with a recorded average of 2.66, compared to a showing of 2.96 in Regional and 3.22 in International firms.



THE LEADING GLOBAL BUSINESS LAW FIRM

A global law firm with lawyers located in more than 40 countries throughout the Americas, Europe, the Middle East, Africa and Asia Pacific

WE DO BUSINESS WHERE YOU DO BUSINESS

For more information about how we can help please contact:

77A Velyka Vasylkivska Str., Kyiv 03150, Ukraine | T +380 44 490 95 75 | ukraine@dlapiper.co.uk

Ratio Evolution

All countries have registered a growth in the ratio between associates and partners since 2014.

Ukraine, which currently has one of the highest number of associates per partner averages within ranked firms, is also the country that has grown that ratio the most in that three year period.

Turkey and Russia have also seen a considerable increase, with both adding over two points to the average.

Country	Average Ratio of Associates to Partner (2014)	Average Ratio of Associates to Partner (2017)	Change
Bulgaria	2.53	2.70	0.17
Estonia	2.59	2.78	0.18
Romania	3.61	3.80	0.18
Albania	2.38	2.60	0.21
Austria	1.94	2.20	0.26
Lithuania	2.98	3.35	0.37
Slovenia	2.02	2.54	0.52
Latvia	2.77	3.37	0.59
Greece	2.46	3.06	0.60
Serbia	2.31	3.33	1.02
Slovakia	2.55	3.69	1.14
Poland	3.01	4.17	1.16
Croatia	2.08	3.27	1.19
Macedonia	4.09	5.32	1.23
Belarus	2.14	3.41	1.27
Czech Republic	2.46	3.84	1.38
Hungary	1.95	3.55	1.60
Turkey	1.98	4.02	2.05
Russia	1.77	4.09	2.32
Ukraine	1.44	4.81	3.37

TURUNÇ*

*A true full-service law firm providing transactional and preventive advice as well as dispute resolution services to clients through integrated offices in each of the three largest cities in Turkey.

İSTANBUL

Teşvikiye Caddesi 19/11
Teşvikiye 34365 İstanbul
Tel: +90 212 259 45 36
+90 212 259 45 37
Fax: +90 212 259 45 38

İZMİR

Cumhuriyet Bulvarı 140/1
Alsancak 35210 İzmir
Tel: +90 232 463 49 07
+90 232 463 49 08
Fax: +90 232 463 49 09

ANKARA

Billur Sokak 23/1
Kavaklıdere 06700 Ankara
Tel: +90 312 468 53 61
+90 312 468 53 62
Fax: +90 312 467 19 19

info@turunc.av.tr

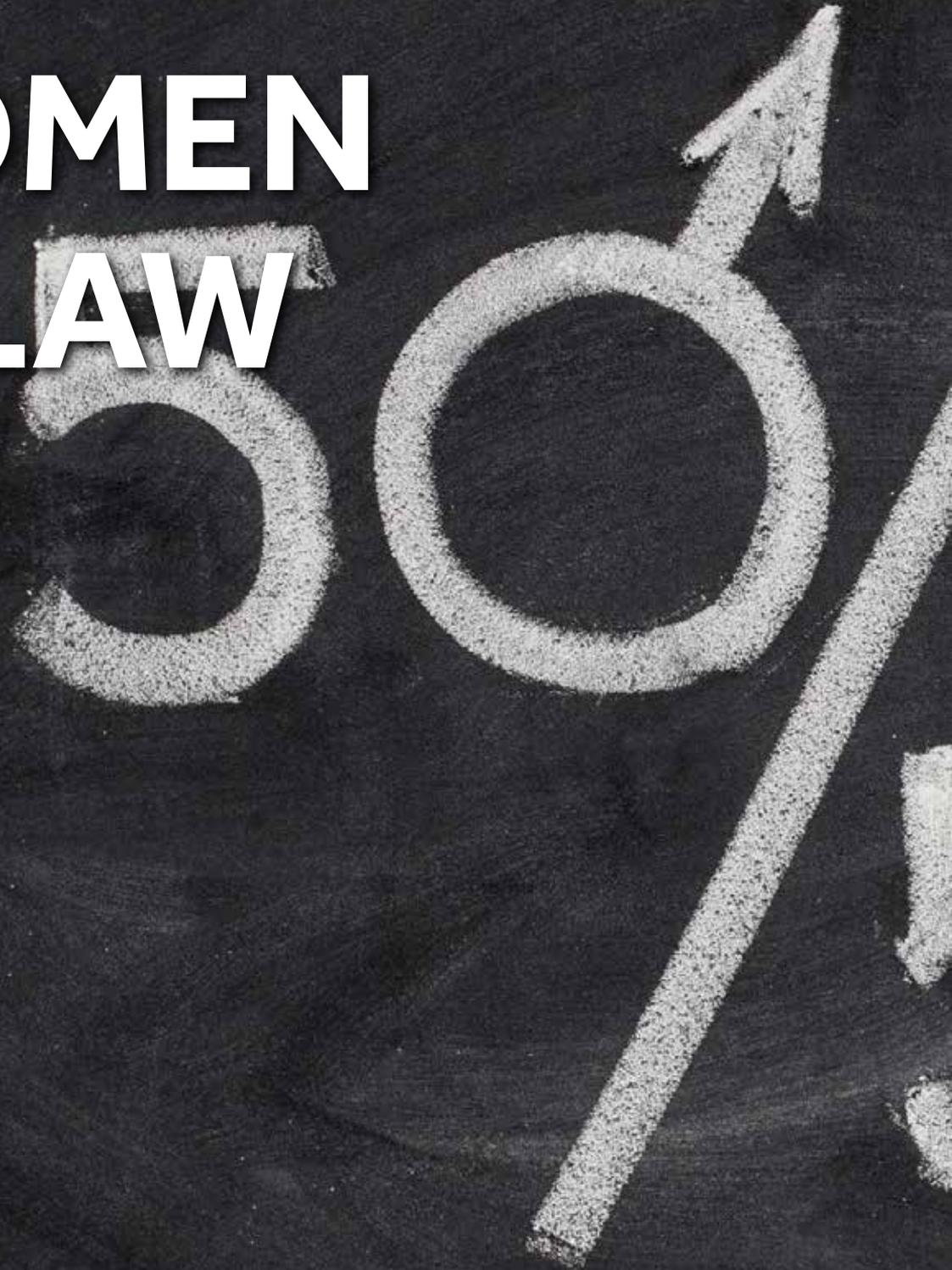
Busiest Partners

Relative to the number of reported client matters in CEE Legal Matters between 2014 and 2016, Ukrainian Partners are kept the busiest with an average of 2.56 projects per partner.

Half of the 20 reviewed markets had a reported number of client matters high enough to have an average of at least one project per partner, with Estonia, Latvia, Lithuania, and Ukraine exceeding two.

Country	Reported Deals to Number of Partners Ratio
Ukraine	2.56
Lithuania	2.28
Latvia	2.15
Estonia	2.14
Slovakia	1.92
Belarus	1.73
Czech Republic	1.60
Slovenia	1.55
Romania	1.29
Poland	1.23
Macedonia	0.96
Hungary	0.95
Serbia	0.95
Turkey	0.88
Bulgaria	0.86
Austria	0.85
Russia	0.78
Croatia	0.69
Albania	0.65
Greece	0.32

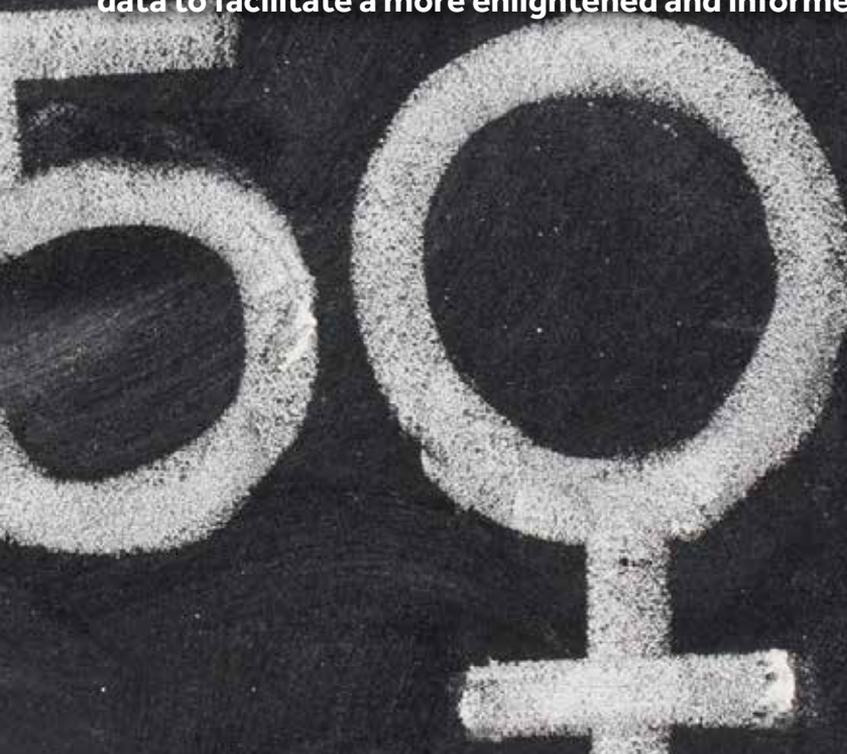
WOMEN IN LAW



What is “Gender Equality” in a workplace? Does it require full representation of each gender (or all genders) in equal proportion to that in the society at large, or with current law school graduates? Or a refusal to make hiring or promotion decisions based on gender? If gender equality is assumed to be a desirable goal, how is it to be achieved – through preferential hiring and promotion policies, or, conversely, through a committed policy of non-preferential treatment? Is it even an important goal in the private sector at all?

The dialogue on gender roles and opportunities is invariably a heated one. With thousands of studies – often contradictory – conducted on the subject, opinions often fly ahead of the facts. Does gender equality exist, or can it – or should it? How often does a call for increased gender equality in the workplace reflect an actual commitment to the goal of increasing opportunities for an under-represented group, rather than an insincere assertion of views thought to be politically correct?

The debate will, we presume, continue for many generations to come, but (fortunately) resolving it is beyond the scope of this report. Instead, we hope only to provide useful data to facilitate a more enlightened and informed conversation.



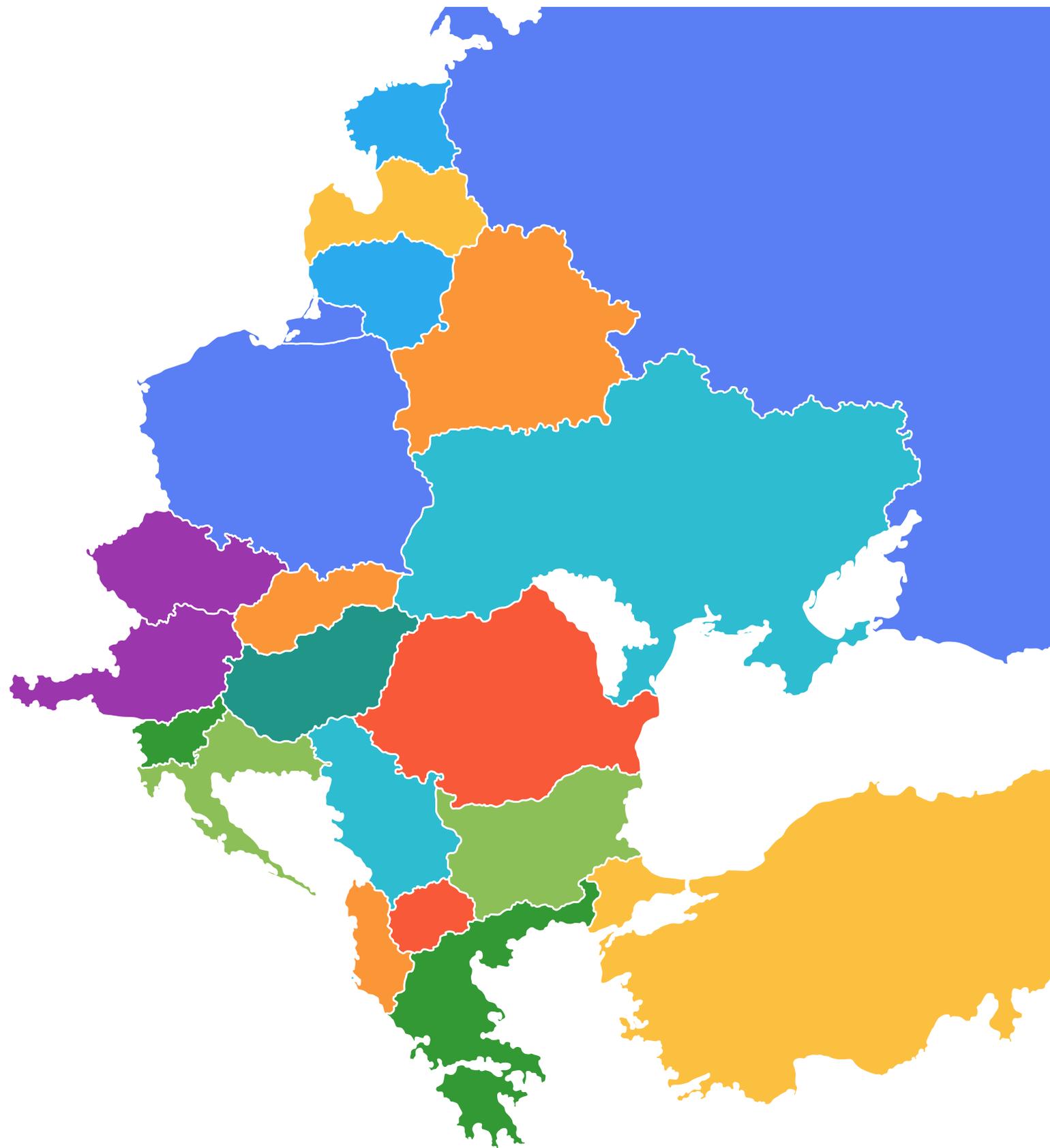
Female Associates

At the associate level, at least, it appears opportunities for women are plentiful. Women make up 68.57% of all associates in Albania, and Macedonia, Romania, Belarus, Turkey, Croatia, Bulgaria, and Greece also see over 60% of all associate positions in law firms filled by women.

Of the 20 CEE jurisdictions surveyed, in fact, only six had fewer than 50% of all associate positions held by women.

Country	Number of Associates	Number of Female Associates	% of Female Associates
Albania	35	24	68.57
Macedonia	108	72	66.67
Romania	1002	660	65.87
Belarus	102	66	64.71
Turkey	808	517	63.99
Croatia	288	183	63.54
Bulgaria	398	246	61.81
Greece	621	378	60.87
Slovenia	166	99	59.64
Estonia	331	185	55.89
Latvia	294	158	53.74
Lithuania	512	263	51.37
Serbia	363	183	50.41
Russia	1103	556	50.41
Poland	1974	965	48.89
Ukraine	491	231	47.05
Hungary	504	234	46.43
Slovakia	248	114	45.97
Austria	955	427	44.71
Czech Republic	808	349	43.19





Female Partners

The numbers for partners are very different. Austria has the lowest percentage of female partners, with just 17.31%, followed closely by the Czech Republic with 17.39%. Macedonia and Romania have the highest percentage of female partners, with 50% and 45.42% respectively.

Albania, which had highest percentage of female associates in CEE, seems to lose them before partnership, as only 25.81% of the partners in that country are women.

Country	Number of Partners	Number of Female Partners	% of Female Associates
Macedonia	26	13	50.00
Romania	273	124	45.42
Belarus	41	16	39.02
Slovakia	75	29	38.67
Turkey	299	113	37.79
Latvia	85	32	37.65
Croatia	97	36	37.11
Bulgaria	191	69	36.13
Slovenia	65	22	33.85
Greece	279	93	33.33
Hungary	222	68	30.63
Serbia	137	41	29.93
Ukraine	178	49	27.53
Albania	31	8	25.81
Estonia	113	29	25.66
Lithuania	129	30	23.26
Russia	441	101	22.90
Poland	566	128	22.61
Czech Republic	230	40	17.39
Austria	439	76	17.31

Associates/Partner Gap

Worth noting is the career progression potential within each jurisdiction. Albania, which was ranked first in the percentage of female associates, has the widest gap between the percentage of female associates and the percentage of female partners (the “Gap”).

In contrast, while Austria is last in CEE in the percentage of female partners in ranked firms, has a smaller Gap, and the Gap in the Czech Republic, which has the second lowest female partnership percentage in the region, is even lower.

Country	% of Associates that are Women	% of Partners that are Women	% Gap
Slovakia	45.97	38.67	7.30
Hungary	46.43	30.63	15.80
Latvia	53.74	37.65	16.09
Macedonia	66.67	50.00	16.67
Ukraine	47.05	27.53	19.52
Romania	65.87	45.42	20.45
Serbia	50.41	29.93	20.49
Belarus	64.71	39.02	25.68
Bulgaria	61.81	36.13	25.68
Slovenia	59.64	33.85	25.79
Czech Republic	43.19	17.39	25.80
Turkey	63.99	37.79	26.19
Poland	48.89	22.61	26.27
Croatia	63.54	37.11	26.43
Austria	44.71	17.31	27.40
Russia	50.41	22.90	27.51
Greece	60.87	33.33	27.54
Lithuania	51.37	23.26	28.11
Estonia	55.89	25.66	30.23
Albania	68.57	25.81	42.76

now
online!

Stay on top of
legal developments
in Austria & CEE
with the latest
roadmap17!

The publication
examines key European
legal initiatives and
national legislative
changes spanning
11 practice areas.

Available online
in English and local
languages at

► roadmap17.schoenherr.eu



schoenherr

Women in Law Evolution

Below is a breakdown of the evolution of the percentages in each jurisdiction between 2014 and 2017. The highest increase in the percentage of women associates was in Albania, which also registered the largest widening of the Gap.

The highest increase in the percentage of partners that are women was in Slovakia, a country that ranks close to the top in terms of narrowing the Gap.

Belarus has shrunk the Gap the most with a 12.62 percentage point decrease among associates and a 7.59 percentage point increase at the partner level.

Country	Change in the % of Associates that are Women	Change in the % of Partners that are Women	Change in the % Gap
Belarus	-12.62	7.59	-20.22
Slovakia	-6.48	11.17	-17.65
Macedonia	-3.54	6.52	-10.06
Greece	-3.01	4.40	-8.40
Slovenia	-8.43	-1.74	-6.69
Turkey	-4.21	2.18	-6.40
Russia	-1.02	3.38	-4.40
Ukraine	-7.54	-4.09	-3.45
Austria	-0.38	2.66	-3.04
Estonia	-0.26	2.38	-2.64
Romania	0.04	1.35	-0.86
Hungary	2.06	2.89	-0.83
Czech Republic	-2.22	-2.05	-0.17
Poland	2.66	1.68	0.97
Bulgaria	5.08	3.08	2.07
Latvia	-1.59	-4.60	3.01
Croatia	5.10	-0.73	5.83
Serbia	1.56	-6.24	7.81
Lithuania	-0.00	-10.35	10.35
Albania	11.29	-6.05	17.70

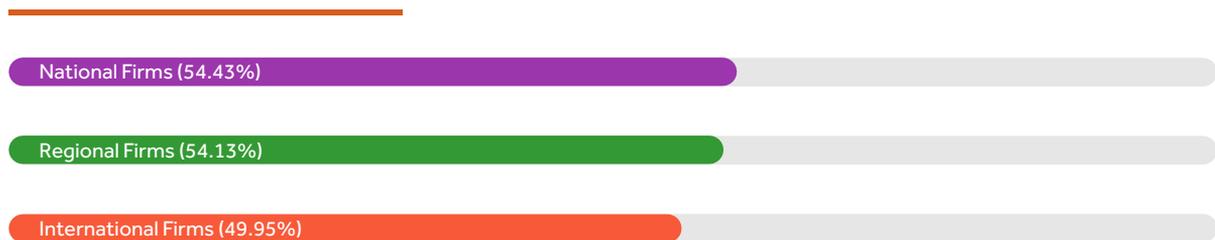
By Type Of Firm

Looking at the averages across CEE, National law firms have the highest percentage of associates that are women – slightly higher than the percentage at Regional firms.

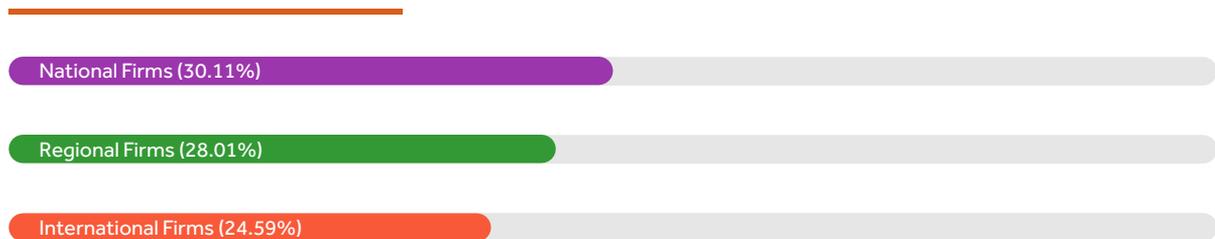
The same ranking exists in terms of the percentage of partners that are women with National firms showing a slightly higher percentage than their Regional counterparts.

Regional firms have the widest Gap.

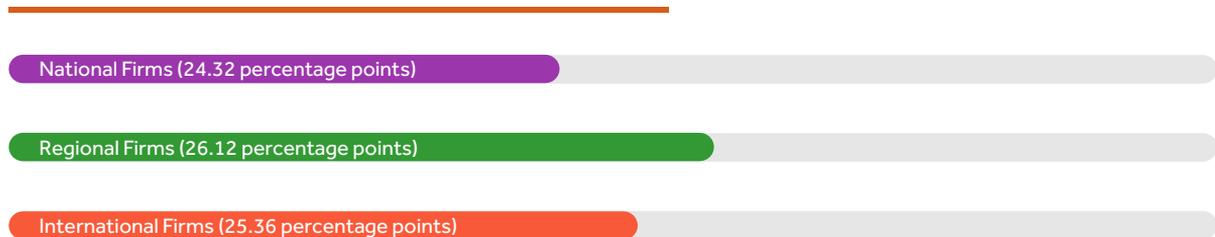
% Of Female Associates



% Of Female Partners



% Gap Between Female Associates and Partners

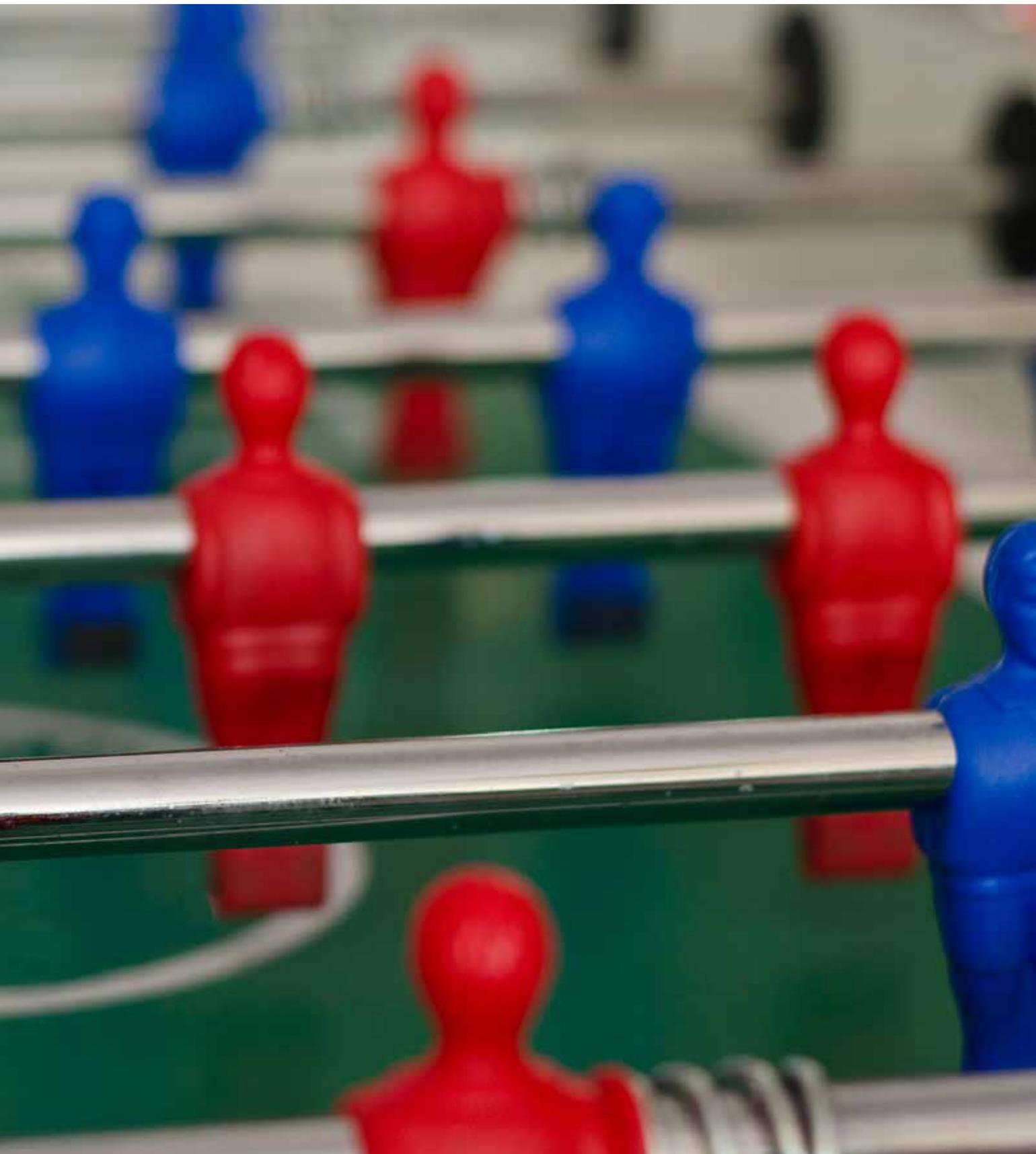


LARGEST TEAMS



Finally, we present the top five ranked firms by size in each market, with the number of total lawyers – partners, counsel, of counsel, advocates, lawyers, and associates – for each, and the number of partners alone in parenthesis.

It appears ranked law firms in Moldova and Montenegro are, on average, and not surprisingly, smaller than those elsewhere in CEE. Meanwhile, ranked firms in Poland are, on average, larger than they are anywhere else in CEE, with Russia holding down a firm second place.



Albania

#	Firm	Number of Lawyers
1	Boga & Associates	17 (6)
2	Haxhia & Hajdari	10 (3)
3	Hoxha, Memi & Hoxha	10 (3)
4	Tashko Pustina	10 (3)
5	<ul style="list-style-type: none"> ■ Drakopoulos; ■ Wolf Theiss 	<ul style="list-style-type: none"> ■ 7 (3) ■ 7 (1)

Belarus

#	Firm	Number of Lawyers
1	Stepanovski, Papakul and Partners	26 (5)
2	Vlasova, Mikhel & Partners	20 (7)
3	SBH Law Office	19 (5)
4	Sorainen	19 (3)
5	<ul style="list-style-type: none"> ■ Borovtsov & Salei; ■ Verkhovodko & Partners 	<ul style="list-style-type: none"> ■ 16 (6) ■ 16 (5)

Austria

#	Firm	Number of Lawyers
1	Wolf Theiss	126 (38)
2	Binder Groesswang	88 (23)
3	Freshfields	88 (15)
4	Dorda	82 (21)
5	CHSH	79 (21)

Bosnia & Herzegovina

#	Firm	Number of Lawyers
1	Maric & Co	18 (6)
2	Law Firm Sajic	13 (4)
3	CMS	12 (2)
4	Baros Law Office	9 (3)
5	<ul style="list-style-type: none"> ■ Dimitrijevic & Partners; ■ Law Office Miljkovic ; ■ Tkalcic-Dulic, Prebanic, Rizvic & Jusufbasic-Goloman; ■ Wolf Theiss 	<ul style="list-style-type: none"> ■ 6 (1) ■ 6 (4) ■ 6 (2) ■ 6 (2)

AVELLUM

INTERNATIONALLY
UKRAINIAN

Law firm inspired by excellence.



www.avellum.com

Bulgaria

#	Firm	Number of Lawyers
1	Djingov, Gouginski, Kyutchukov & Velichkov	48 (15)
2	Penkov, Markov & Partners	40 (8)
3	Gugushev & Partners	40 (5)
4	Popov & Partners Law Office	35 (19)
5	Boyanov & Co.	34 (12)

Croatia

#	Firm	Number of Lawyers
1	Hanzekovic & Partners	85 (8)
2	Divjak, Topic & Bahtijarevic	29 (6)
3	CMS	25 (7)
4	Savoric & Partners	23 (5)
5	Vukic & Partners	22 (11)

Czech Republic

#	Firm	Number of Lawyers
1	Havel Holasek & Partners	143 (26)
2	Dentons	63 (14)
3	Kocian Solc Balastik	62 (12)
4	White & Case	47 (15)
5	Pokorny, Wagner & Partners	43 (3)

Estonia

#	Firm	Number of Lawyers
1	Sorainen	55 (9)
2	Cobalt	50 (8)
3	Ellex	41 (13)
4	TGS Baltic	38 (8)
5	Eversheds Sutherland	23 (6)

Greece

#	Firm	Number of Lawyers
1	Kyriakides Georgopoulos Law Firm	64 (19)
2	PotamitisVekris Law Firm	55 (11)
3	Zepos & Yannopoulos	54 (16)
4	Bernitsas Law	50 (11)
5	Karatzas & Partners	41 (8)

Latvia

#	Firm	Number of Lawyers
1	Cobalt	47 (8)
2	Sorainen	45 (8)
3	Ellex	42 (6)
4	TGS Baltic	23 (11)
5	Magnusson	21 (5)

Hungary

#	Firm	Number of Lawyers
1	Oppenheim	51 (16)
2	CMS	50 (11)
3	Lakatos Koves and Partners	44 (9)
4	Dentons	35 (10)
5	CHSH	30 (9)

Lithuania

#	Firm	Number of Lawyers
1	Sorainen	87 (12)
2	Ellex	86 (19)
3	Cobalt	70 (10)
4	TGS Baltic	70 (10)
5	Glimstedt	49 (12)

Macedonia

#	Firm	Number of Lawyers
1	Cukic & Markov	34 (2)
2	Cakmakova Advocates	18 (4)
3	Trpenoski Law Firm	16 (2)
4	Polenak Law Firm	16 (5)
5	Debarliev, Dameski & Kelesoska Attorneys at Law	13 (6)

Montenegro

#	Firm	Number of Lawyers
1	Prelevic Law Firm	13 (2)
2	Law Office Vujacic	7 (2)
3	Radonjic Law Firm	7 (2)
4	Local Lawyers in Cooperation with Karanovic & Nikolic	4 (0)
5	Petosevic	4 (1)

Moldova

#	Firm	Number of Lawyers
1	Efrim Rosca & Asociatii	12 (2)
2	ACI Partners	11 (5)
3	Turcan Cazac	10 (2)
4	Gladei & Partners	9 (2)
5	Cobzac & Partners	4 (1)

Poland

#	Firm	Number of Lawyers
1	Dentons	181 (35)
2	Domanski Zakrzewski Palinka	160 (29)
3	CMS	154 (20)
4	Wardynski & Partners	123 (28)
5	Soltysinski Kawecki & Szlezak	110 (25)

Romania

#	Firm	Number of Lawyers
1	Nestor Nestor Diculescu Kingston Petersen	139 (25)
2	Tuca Zbarcea & Asociatii	125 (29)
3	Popovici Nitu Stoica & Asociatii	76 (12)
4	Musat & Asociatii	74 (16)
5	PeliFilip	68 (12)

Russia

#	Firm	Number of Lawyers
1	Gorodissky & Partners	125 (27)
2	Berwin Leighton Paisner (Gołtsblat BLP)	108 (18)
3	Alrud Law Firm	100 (9)
4	Linklaters	73 (9)
5	Dentons	63 (30)

Serbia

#	Firm	Number of Lawyers
1	Karanovic & Nikolic	53 (12)
2	JPM Jankovic Popovic & Mitic	39 (7)
3	Zivkovic Samardzic	39 (15)
4	BDK Advokati	33 (7)
5	Vukovic & Partners	23 (5)

Slovakia

#	Firm	Number of Lawyers
1	Ruzicka Csekes	36 (11)
2	Taylor Wessing	26 (5)
3	Cechova & Partners	20 (7)
4	Barger Prekop Attorneys	20 (5)
5	■ Allen & Overy; ■ Dentons	■ 19 (4) ■ 19 (2)

Slovenia

#	Firm	Number of Lawyers
1	Rojs, Peljhan, Prelesnik & Partners	37 (10)
2	Miro Senica and Attorneys	27 (5)
3	Jadek & Pensa	27 (9)
4	Selih & partnerji	27 (9)
5	ODI Law Firm	19 (3)

Turkey

#	Firm	Number of Lawyers
1	ELIG Attorneys at Law	87 (7)
2	Gun + Partners	75 (11)
3	Dentons (Balcioglu Selcuk Akman Keki Attorney Partnership)	67 (10)
4	Moroglu Arseven	39 (9)
5	<ul style="list-style-type: none"> ■ Bener Law Office; ■ Kolcuoglu Demirkan Kocakli ■ ADMD/Mavioglu & Alkan Law Office 	<ul style="list-style-type: none"> ■ 37 (6) ■ 37 (3) ■ 37 (12)

Ukraine

#	Firm	Number of Lawyers
1	Asters	76 (15)
2	Sayenko Kharenko	75 (9)
3	Integrites	76 (9)
4	GoLaw	43 (3)
5	Vasil Kisil & Partners	42 (7)



CEE LEGAL MATTERS

Thank You To Our Country Knowledge Partners For Their
Invaluable Input and Support

DRAKOPOULOS
LAW FIRM

Albania

schönherr

Bulgaria

DRAKOPOULOS
LAW FIRM

Greece

WOLF THEISS

Hungary

ODI Law

Macedonia

WOLF THEISS

Poland

MARAVELA | ASOCIAȚII

Romania

C/M/S

Law . Tax

Russia

karanovic/nikolic

Serbia

ODI Law

Slovenia

TURUNÇ

Turkey

AVELLUM
INTERNATIONALLY
UKRAINIAN

Ukraine



ODI Law

ODI Law ODI Law

ODI Law

ODI Law

ODI Law

ODI Law ODI Law

ODI Law