Flow Logic

CEE PM Capacity Index

H1 2025

Europe's Hidden PM Powerhouse

Discover potential. Find capacity. Outsmart delivery.

Whitepaper by Flow Logic

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Foreword

Flow Logic marks its 5th anniversary this year with one of its leading experiences in building and providing Project Management capacity for SMEs and Corporations.

For five years, we have been in touch with over 5,000 key stakeholders, decision makers, and high calibre Project Managers across Europe. We have delivered over 50,000 hours of high-quality projects and our clients came back on average over 5 times. For an agency of our size this is really amazing and we are here to stay!

Remaining true to our values we've put competence, hearts, flexibility and speed to write this whitepaper as a symbol of our long-term standing and even stronger commitment to our ecosystem.

As businesses scale digital delivery and seek resilient, high-performing, affordable talent locations, this whitepaper reveals where capacity lives, where costs align, and where skills are future-ready.

**Sincerely,
Maya Milanova
CEO**

Flow Logic
Enable Your Transformation

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About Flow Logic

At Flow Logic, we enable companies scale smarter, adapt faster, and deliver better. We help businesses align people, processes, and performance to successfully execute transformation and be future-ready.

5 years

Our company was founded in 2020 and since then we are constantly in progress.

100%

We are a female led company and our team brings our clients high quality divercity too.

10+

The number of professional certificates supporting our expertise in bringing transformative results.

x 5.2

This many times our established customers came back with new and updated requests.

✔ **On-Demand Project Managers:** Access skilled contract project managers who seamlessly integrate with your team on flexible engagement terms.

✔ **Nearshore Delivery Teams:** Our Southeast Europe-based nearshore teams will complement your in-house operation in a timely manner, with high-quality and optimal cost.

✔ **Intelligent Workflow Solutions:** We help streamline your business processes, ensuring seamless integration of the right AI tools that enhance productivity, improve agility, and optimize workflows.

✔ **Flexible Talent Solutions:** Whether you need project-based talent, contract-to-hire options, or niche specialists, we provide you with the right people, at the right time - from team augmentation to talent acquisition.

Overview

The PM Capacity Index addresses a core challenge in global delivery planning: How to measure whether a market can sustainably support project-based work at scale.

The CEE PM Capacity Index H1 2025 is a **data-driven whitepaper** that provides a forward-looking assessment and comparison of **project management ecosystem capacity** across 11 Central and Eastern European (CEE) countries.

The Index **ranks** all 11 markets based on **five comparable indicators** related to talent supply, pay levels, hiring pressure, skill relevance, and training depth.

The whitepaper **enables decision-makers** to:

➤ Discover untapped PM markets
➤ Evaluate cost-value trade-offs
➤ Align expansion or hiring plans with regional delivery capacity
➤ Benchmark their location strategies with data, not assumptions

This paper is for employers, outsourcing providers, training, and administration to understand the regional **readiness** to support smarter delivery strategy, workforce planning, and outsourcing decisions for scalable project execution.

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The Index

The CEE PM Capacity Index is Flow Logic's proprietary framework for measuring and comparing project management talent ecosystems across Central and Eastern Europe. It provides a data-driven view into where certified PM talent is most available, cost-efficient, future-ready, and scalable.

The index is built on weighted composite of five normalized indicators (categories) in the scale 0-10, from low to high. They were made objectively comparable between each other and across the 11 countries:

- Certified PMs: the supply of certified professionals per 100k population - measure of talent maturity and professional discipline.
- Salary Level: the average gross salary as a key cost-efficiency indicator.
- Talent Availability: PM job demand per PM capita - measure of demand pressure and indication of availability..
- Skills Modernity: adoption of latest methods, tools and approaches - Prevalence of Agile, hybrid, and AI-enhanced project methods
- Training Ecosystem: accessibility and quality of PM education and certification - measures capacity to grow PM talent through education.

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Coverage

This edition of the index evaluates 11 countries:

Bulgaria | Croatia | Czech Republic | Estonia | Hungary | Latvia | Lithuania | Poland | Romania | Slovakia | Slovenia

The countries in scope were selected based on their strategic role in outsourcing, transformation projects, and digital economy growth.

The whitepaper contains information about:

➤ The overall index per country
➤ Leaders per category
➤ Talent distribution by industry
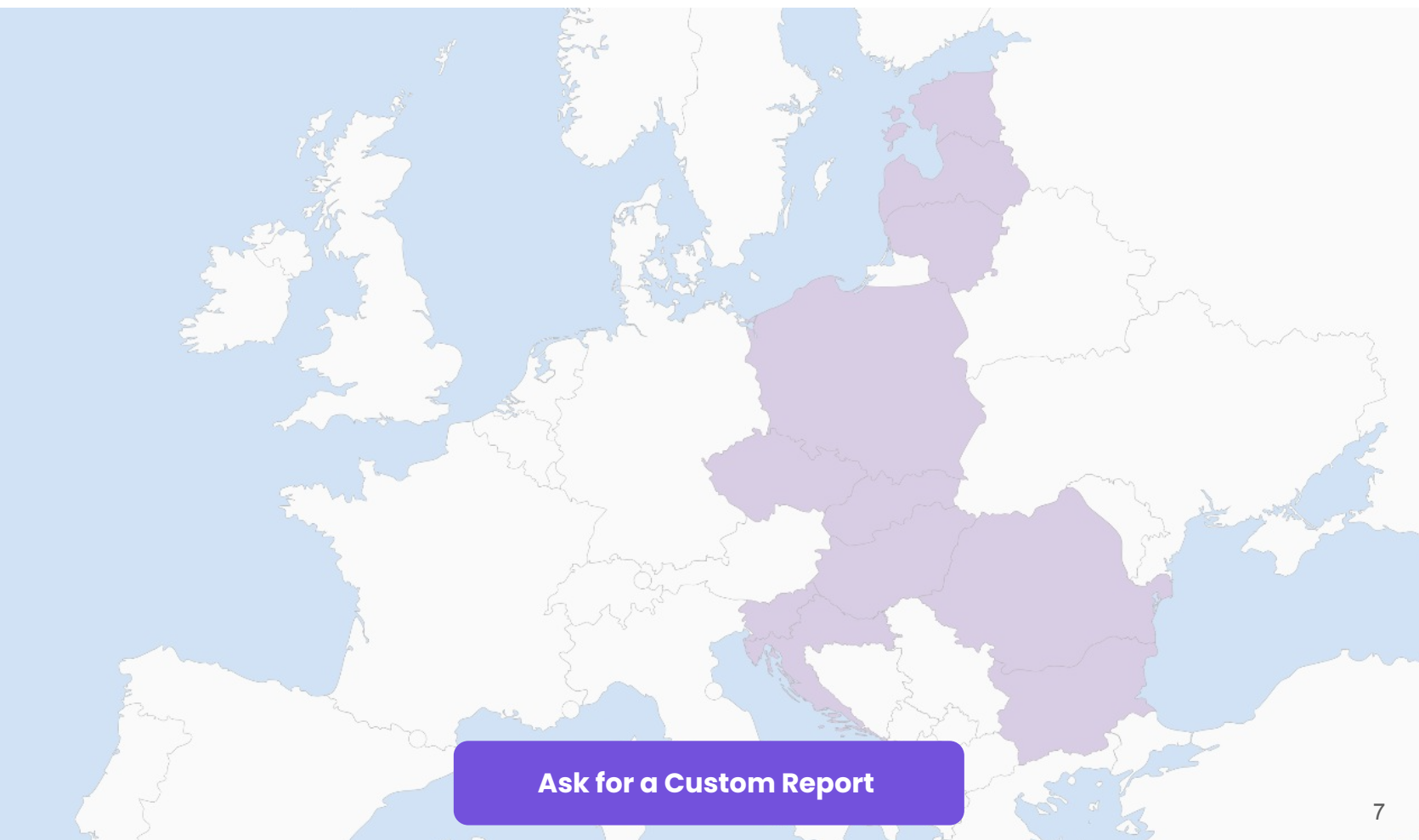
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Overall Ranking

The **CEE PM Capacity Index H1 2025** reveals clear signals of project delivery readiness across the 11 countries. There is no single country that dominates across all parameters, and different markets distinguish themselves as category leaders in specific dimensions of **scalable project management**.

Index Highlights

- CEE Composite Score Range: 3.0–7.2
- CEE Average Composite Score: ~4.8
- Upper Tier (>6.0): Bulgaria, Romania
- Middle Tier (4.0–6.0): Poland, Hungary, Lithuania, Slovakia, Croatia
- Lower Tier (<4.0): Slovenia, Latvia, Estonia, Czech Republic

Each tier reflects relative delivery capacity strength. Notably, several mid-tiered markets (e.g., Lithuania and Hungary) punch above their weight in specialized areas, offering **niche potential** for scale or **capability-led** sourcing.

The region's ongoing transformation - digitally, operationally, and institutionally - has broadened demand into finance, manufacturing, healthcare, energy, and public services.
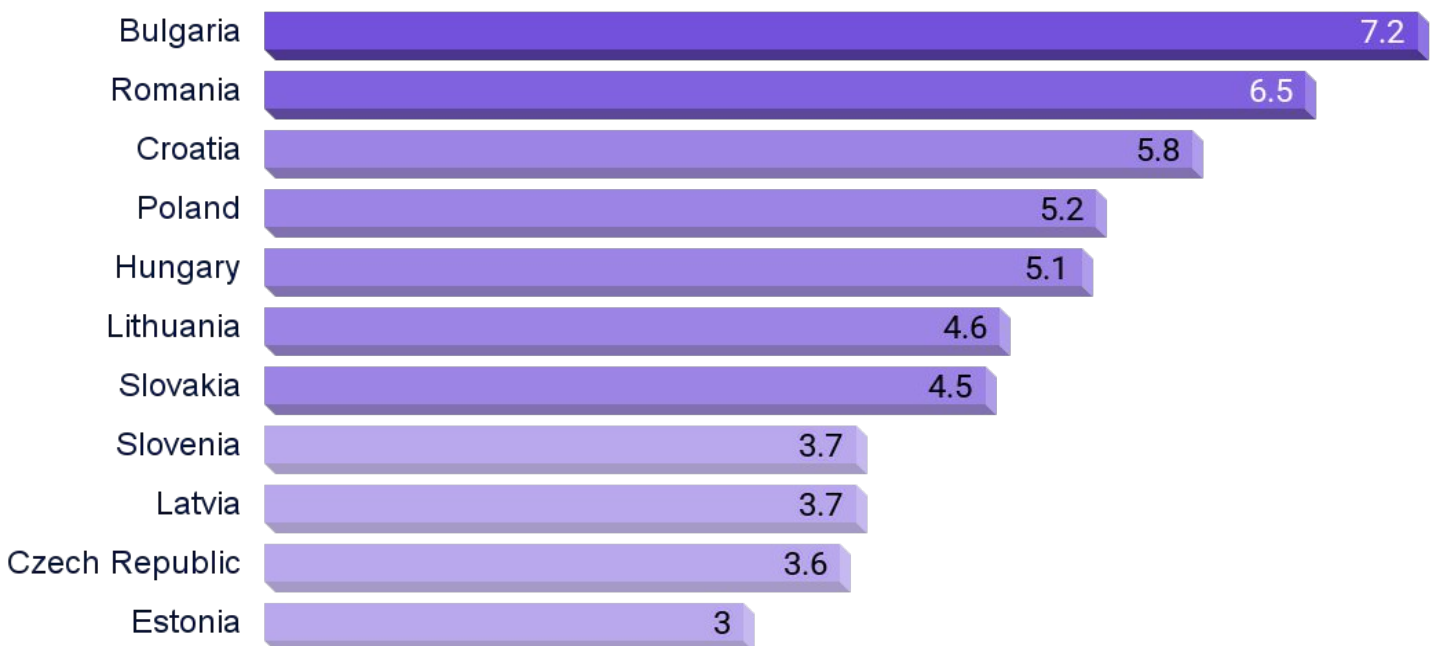
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Composite Index Leader

Bulgaria ranks highest in the overall composite score, reflecting a rare balance of talent availability, affordability, professional certification, and training access. It performs strongly across all five indicators, making it one of the most **delivery-scalable ecosystems** in the region.

➢ High certified PM density
➢ Among the most cost-efficient markets for hiring PMs
➢ Solid training infrastructure and improving skills modernity
➢ Low to moderate hiring saturation

Bulgaria's lead reflects a combination of strategic affordability and professional readiness, especially valuable for companies seeking to establish delivery hubs or expand regional transformation teams.

Country	Score
Bulgaria	7.2
Romania	6.5
Croatia	5.8
Poland	5.2
Hungary	5.1
Lithuania	4.6
Slovakia	4.5
Slovenia	3.7
Latvia	3.7
Czech Republic	3.6
Estonia	3

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Leaders by Category

Indicator	Top Countries	Strength
Certified PMs	Lithuania, Bulgaria	Highest ratio of certified PMs per capita
Salary Level	Bulgaria, Romania	Most cost-efficient hiring environments
Talent Availability	Romania, Bulgaria	Lowest PM job demand per PM capita (indicating availability)
Skills Modernity	Estonia, Czech Republic	Most future-ready with Agile/AI adoption
Training Ecosystem	Poland, Czech Republic	Strongest learning infrastructure and specialization

Strategic Insights

- **Bulgaria and Romania** offer immediate scalability at a high value-for-cost ratio, ideal for delivery hubs or outsourcing expansion.

- **Poland and Lithuania** are building **future-ready ecosystems**, strong in skills and education, but may become more competitive in cost and availability.

- **Czech Republic and Estonia** show **strong innovation traits**, but need to boost talent availability and credential adoption to fully capitalize.

- Countries like **Hungary**, **Latvia and Slovenia** may be niche-ready but aren't yet structured for high-scale PM delivery.

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CEE PM Talent by Industry

Project managers across CEE are employed in sectors including IT & Telecom, Construction, Finance, Manufacturing, Healthcare, Energy, Government, and Business Services. IT dominates in urban hubs, while Construction and Public Projects remain strong in EU-funded regions. This distribution reflects varied economic structures and transformation maturity.

Industry	PMs Share (%)	Typical Roles
IT & Telecom	~30–40%	Agile PMs, Scrum Masters, Delivery Leads
Construction & Infra	~20–25%	Site PMs, Civil Project Managers, EU Grant PMs
Finance & Banking	~10–12%	Digital PMs, Regulatory Projects, PMO Leads
Manufacturing & Eng.	~10%	Eng PMs, Process PMs, Supply Chain PMs
Healthcare & Pharma	~3–5%	Clinical PMs, eHealth PMs, R&D Project Leads
Energy & Utilities	~3–5%	Grid Upgrade, Renewables, Infrastructure PMs
Government & Public	~7–10%	Policy Implement., Public Works, eGov PMs
Business Services	~5–7%	PMs in BPO, SSC transitions, transformation

While some countries remain specialized (e.g., construction-heavy in the Balkans, IT-led in the Baltics), the overall trend points toward industry convergence in how PM talent is deployed.

Project management talent distribution across a wide range of sectors, reflects the region's diverse economic structure, evolving digital maturity, and EU-driven development strategies.

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Key Takeaways
Strengths and Opportunities

The CEE PM Capacity Index H1 2025 reveals clear patterns in the regional distribution, maturity, and cost-efficiency of project management talent across Central and Eastern Europe. Here are the most strategic insights from the data:

Regional Strengths

- Bulgaria is the most balanced and cost-efficient performer, topping the composite index due to its strong certification density, high talent availability, and affordable PM pay levels.
- Poland is the largest PM market by far, with the most mature digital skill base but also the most saturated in terms of hiring activity.
- Romania provides one of the best cost-to-capability trade-offs, combining affordability, availability, and a growing Agile-literate workforce.
- Czech Republic and Estonia stand out for modern delivery readiness, driven by Agile fluency and digital-first capabilities.

Emerging Opportunities

- Croatia shows promising availability and credential density, especially for traditional and construction-aligned PM roles.
- Lithuania combines solid training infrastructure with moderate costs, making it ideal for second-tier scaling.
- Slovakia and Hungary remain strong in infrastructure-heavy sectors with solid industrial PM profiles.

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Key Takeaways
Patterns and Insights

Strategic Patterns

- Salary pressure is increasing in larger markets, while smaller countries offer untapped cost-efficient pools of PM talent.
- Modern PM ecosystems correlate strongly with higher scores in Skills Modernity and Training Infrastructure, suggesting an inflection point in future-readiness.
- The delivery advantage lies not only in price, but in credential density and skill fluency - especially in Bulgaria, Romania, and Estonia.

For Decision-Makers

- Delivery strategy should prioritize high-capacity, low-churn markets like Bulgaria and Romania, especially in PMO-heavy or regulated sectors.
- Outsourcers and SSCs should consider second-tier cities and overlooked countries to avoid rising cost and churn in saturated hubs.
- Policymakers should invest in modern training ecosystems and certification infrastructure to enhance competitive positioning.

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In Conclusion

Final Marks

- Affordable capacity does not mean poor quality - Bulgaria and Romania prove otherwise.
- PMs are no longer concentrated solely in IT or construction.
- Agile readiness is the differentiator between classic and future-fit markets.
- PM training access correlates with sustainable talent pipelines.
- Smaller markets with lower demand can offer faster hiring and lower competition.

Future Outlook

As AI-driven delivery, remote PM models, and transformation-at-scale increase, countries with modernized ecosystems and cost-flexible talent will gain relevance.

The next wave of competitive advantage will belong to regions that can combine affordability, agility, and sustainable skill growth.

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Methodology and Scoring

The CEE PM Capacity Index is calculated using a weighted composite of five key indicators, each reflecting a critical dimension of project management talent ecosystems. Each parameter is scored on a normalized 0-10 scale to enable fair, cross-country comparison.

1. Certified PMs Rate

What it measures: The number of certified project managers (e.g. PMP®, PRINCE2®, IPMA) per 100,000 people. A strong indicator of workforce professionalism and readiness to lead structured delivery.

2. Salary Level

What it measures: The average annual gross salary to hire PMs, as an indicator to calculate and project anticipated costs. Identifies markets where top talent is more affordable and is crucial for outsourcing, delivery hubs, and scale of hiring.

3. Talent Availability

What it measures: A comparable score of PM job postings per thousand PMs. Indicates availability of PM talent - lower hiring activity signals less market saturation and more accessible professionals.

4. Skills Modernity State

What it measures: Prevalence of Agile, hybrid, and AI-enhanced project methodologies in job postings and certifications. Reflects a country's alignment with future-ready project delivery frameworks and digital operating models.

5. Training Ecosystem Standing

What it measures: The accessibility, density, and specialization of project management training and certification programs. Reveals how scalable the talent supply is through education and professional development channels.

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Disclaimer

The **CEE PM Capacity Index H1 2025** is based on publicly available data, third-party labor market reports, and synthesized estimates from various talent and economic sources. While every effort has been made to ensure accuracy, the findings and interpretations presented in this whitepaper are:

- **Indicative, not prescriptive**: The index is designed as a benchmarking and planning tool. It does not constitute financial, hiring, or investment advice.

- **Time-sensitive**: Data reflects conditions as of **June 2025**, including PM salary ranges, certification volumes, job market saturation, and training availability. These factors are subject to change and may vary by city, sector, or organization.

- **Methodologically transparent**: Index indicators are normalized or reverse-normalized to enable comparability across countries. Scoring models apply equally or proportionally weighted logic based on talent-related strategy assumptions.

- **Not exhaustive**: While the index includes 11 Central and Eastern European countries, other regions or sub-regions may also exhibit strong project management capacity but fall outside this study's scope.

- **Subject to local variation**: Within-country disparities (e.g. between capital cities and rural areas, or between industry clusters) may not be fully captured by national averages.

Flow Logic accepts no liability for any decisions made based on this whitepaper. Users are encouraged to validate the findings with local partners, data, and on-the-ground insight before acting on any strategic recommendations.

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Custom Insights & Data

For teams that need more than a regional overview, Flow Logic offers **tailored intelligence products** built on the PM Capacity Index framework.

What's Available

- Country-specific delivery strategy data
- Country-by-country comparison
- Industry-aligned PM capacity briefs
- Customized maturity benchmarking by region or vertical
- Scoring dashboards with deeper data granularity

Who It's For

- COOs and strategy leaders evaluating new delivery hubs
- Heads of PMO optimizing resource allocation
- Talent, HR, and transformation leaders planning regional workforce expansion

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Sources

Resources & Data Sources

➢ PMI 2024 Talent Gap Report
➢ Eurostat Labour Market Statistics
➢ LinkedIn Talent Demand Dashboard (2024-2025)
➢ National PM job and training provider registries
➢ Flow Logic research & modeling framework

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