Lost & Found in Flexibility

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April 2026

The Future of Work Report 2026



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Lost & Found in Flexibility



Julita Iks
CEO, Talent Alpha

For years, conversations about the future of work have focused on technology. Artificial intelligence, automation, digital transformation – all of these forces are reshaping how organizations operate. But beneath these trends lies a more fundamental shift: the way companies access and organize talent is changing.

The traditional model of building large, static workforces is gradually giving way to something more dynamic. Organizations today increasingly operate through networks – combining internal teams with external specialists, partners, and project-based talent. Flexibility is no longer a temporary solution. It is becoming a structural element of how modern businesses work.

This transformation is driven by several powerful forces. Skills are evolving faster than ever before, making it difficult for companies to maintain all capabilities internally. New generations of professionals value autonomy, mobility, and project-driven careers. And globalization has opened access to talent far beyond the boundaries of a single country or organization.

As a result, models such as outsourcing, subcontracting, and the gig economy are becoming an integral part of the global talent ecosystem. When used effectively, they allow companies to scale faster, innovate more quickly, and access highly specialized expertise exactly when it is needed.

But flexibility also comes with new challenges. Organizations must learn how to manage distributed teams, build trust across external partnerships, and integrate different talent models into one coherent strategy.

At Talent Alpha, this shift has been at the center of our work from the very beginning. By connecting organizations with a global network of technology partners and specialized talent, we have witnessed firsthand how flexible talent models are transforming the way companies deliver projects and build competitive advantage.

In this year's edition of the Future of Work report – Lost and Found in Flexibility, we explore the growing importance of flexible talent ecosystems. We look at the evolution of outsourcing and subcontracting, present the results of our Future of Work 2026 research, and share regional insights from Poland, Bulgaria, Romania, and Ukraine.

The future of work will not be defined solely by technology. It will be defined by how effectively organizations can access, mobilize, and collaborate with talent.

And in a world where change is constant, flexibility may prove to be the most valuable capability of all.

With our very special thanks:

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The IT Girls Foundation is an organization that supports, associates and educates children, youth and women interested in working in technological professions, in particular IT.

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Nudge Ltd helps organisations build resilient, future-ready workforces by making leadership and talent risk visible and enabling better decisions across complex, evolving ecosystems.

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Randstad is the world's largest talent company deeply understanding the labor market, helping to create the high-quality, diverse and agile workforces needed by employers to succeed.

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ITwiz is a platform for knowledge exchange between IT companies and people making decisions on investments in IT solutions. Our activities include print and digital publications, a website and events.

1.

Theoretical Background: Gig Economy, Subcontracting, and Outsourcing Practices

Global scale and dynamics of IT outsourcing, subcontracting and the gig economy

Over the past two decades, globalization and technological advances have significantly reshaped the labor market. Companies increasingly rely on **outsourcing, subcontracting, and gig work to access specialized skills, reduce costs, and maintain flexibility**. As a result, externalized employment has become a central element of modern business strategies, particularly in the technology sector.

One of the most dynamic areas of this shift is IT outsourcing. According to projections, the global IT outsourcing market is expected to reach a staggering **US$634.18 billion** by **2026**.

Adoption is widespread, with companies outsourcing IT functions such as application development, cybersecurity, cloud management, and technical support. This trend is especially prominent in industries such as finance, retail, telecommunications, healthcare, and manufacturing.

These developments are closely linked to the rise of the gig economy, which is based on temporary, project-based, and freelance work. The global gig workforce is estimated to exceed **160 million workers** across sectors including IT, professional services, and platform-based industries.

In practice, organizations use several outsourcing models. Software houses deliver complete projects or dedicated teams, staffing agencies provide individual specialists who integrate into internal teams, and freelancers offer highly specialized skills on a short-term basis. Increasingly, companies also turn to B2B talent marketplace platforms, which connect them with verified external providers and project teams.

Platforms such as Talent Alpha, Toptal, and Upwork enable faster, project-based collaboration with curated partners, reflecting the broader platformization of work. This allows organizations to scale outsourcing efficiently while maintaining quality and access to specialized expertise.

Overall, modern workforce structures are becoming more complex and hybrid. Companies now combine internal employees with external partners, freelancers, and platform-based teams, reflecting a broader shift toward flexible, globally distributed work models.

The Great Workforce Adaptation - a new paradigm of trust and efficiency in 2026

The 2026 labor market resembles a landscape after a storm - the dust has yet to settle, and the horizon remains blurred. We find ourselves in a state of peculiar tension, where the business optimism of leaders clashes with the stark realism of employees. While 95% of global executives look toward the future with hopes of growth, only half of the talent pool shares this enthusiasm. This trust gap serves as a signal to begin the process that Randstad defines as the Great Workforce Adaptation. This phenomenon is not merely another market shift, but a fundamental move away from traditional management toward actively building a new ground for mutual understanding. In Poland, where business optimism is notably lower than the global average at 70%, this process takes on a particularly pragmatic character. Our local market has become an ecosystem where technological optimism mixes with stability concerns, and declared inclusivity often collides with a genuine sense of uncertainty.

Me and the world - from denial to technological support

One of the most significant challenges we face is the evolution of Artificial Intelligence from an experimental phase to a core business tool. While global debates focus on the pace of implementation, technology adaptation in Poland is hitting economic barriers. Our country currently holds a distant position in AI investment rankings - only 38% of companies allocated funds for this purpose in the past year, a result drastically lower than the global average of 63%. This gap stems largely from rising operational costs and wage pressures, forcing domestic employers into survival-oriented strategies at the expense of innovation.

Despite this investment lag, employees expectations remain high; 65% of talent expect companies to increase spending on AI skill development. However, the key to success is not the simple replacement of humans with technology, but the merging of unique human strengths with algorithmic efficiency. AI should be viewed as a key support tool, taking over repetitive, low-complexity tasks-a move that 62% of employees believe would positively impact their productivity. Simultaneously, employers must address workforce anxieties: in Poland, 48% of respondents fear that AI will eliminate entry-level positions. The role of leaders is therefore to reassure teams that technology is meant to augment them, not exclude them.

Me and my team - managers as architects of stability

In a tech-driven reality, human relationships paradoxically gain value, and managers become the architects of stability within organizations. Although overall trust in top-level management has declined, the bond between employees and their direct supervisors is strengthening; 63% of talent feel a stronger connection to their manager than to the company as a whole. Today's leaders are key to unlocking the potential of multi-generational teams, facilitating knowledge exchange among the five generations currently in the workforce. Under their guidance, Gen Z introduces older colleagues to modern tools, while Baby Boomers share invaluable industry experience.

Me - redefining success and autonomy as future currency

In an era of macroeconomic uncertainty, 60% of employees look to their supervisors for support and clarity, making the line manager the true glue of the organization. To fulfill this role effectively, however, managers need the right tools from their companies to build trust and support career development. This is crucial, as trust has become the foundation of retention: employers must encourage management to engage in regular dialogue with employees to identify turnover risks early on.

Parallel to technological shifts, we are witnessing the end of the linear career ladder. Both employers and employees agree that traditional professional paths are history. Modern talent redefines success through risk mitigation-building professional portfolios and seeking security in a diversity of experiences rather than long tenure at a single firm. Today, 87% of employers prioritize specific skills over formal education, and 72% consider traditional development models to be obsolete.

In this new landscape, work flexibility has become a critical benefit. In Poland, this dimension has become a pillar of loyalty: 32% of employees would be willing to resign if they lacked freedom regarding their work time and location. Even more important is autonomy in self-shaping how duties are performed-planning activities, deciding on team involvement, or setting deadlines. A lack of such independence would prompt 34% of respondents to leave.

The Leadership Challenge - autonomy vs. control



Joanna Kolasa
HR Consultancy manager, Randstad Polska

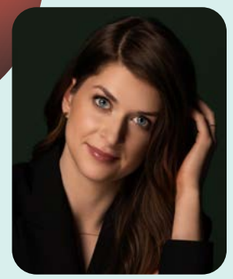
As Joanna Kolasa, an expert at Randstad, notes, autonomy has become the currency of the labor market. It allows employees to better identify with the company and feel a real impact on their own development and the enterprise's growth. However, she warns that many firms mistake autonomy for a lack of control, leading to chaos or team frustration. True autonomy requires mature processes and clear priorities to mitigate the risk of declining collaboration quality.

The data confirms this: while 82% of companies in Poland indicate that greater autonomy leads to increased engagement and retention, 74% also see its negative impact on team communication. Half of employers even claim that employees today expect too much regarding independence. The solution is not a return to rigid control, but building a culture based on trust and accountability for results, rather than hours spent in the office.

Expert view



Marzena Milinkiewicz
Managing director,
Randstad Polska



Wioletta Klimczak
CEO & Co-founder,
IT Girls Foundation



Fran Pestana
Business Psychologist,
Talent Strategist,
Executive Coach,
Founder & CEO Nudge Ltd.

The Polish labor market in 2026 has reached a turning point that we define as the Great Workforce Adaptation. While the global debate focuses on the scale of technology investment, in our context, AI should primarily serve as a tool for handling repetitive tasks, allowing employees to focus on areas where human potential remains irreplaceable. The traditional view of a career is becoming a thing of the past; today, we define success through flexibility and the ability to fully leverage unique competencies. In this era of change, the direct supervisor becomes the team's main pillar of stability and the architect of trust. However, we must remember that autonomy has become the new currency of the labor market - without providing employees with genuine agency and trust, we will not be able to fully unlock our organizations' growth potential.

While I avoid labeling or categorizing generations, there is a clear difference in how the younger generation approaches work today. We often observe a desire for „everything here and now"- high expectations regarding pay and flexibility - sometimes at the expense of the patience and curiosity needed for long-term growth.

These intergenerational tensions are rarely about who is right; they are simply a clash of values. We often dismiss what is unfamiliar as „wrong," but the „Lost & Found in flexibility" era requires us to move past these biases. To succeed in an agile, outsourced market, we need more than just flexible contracts - we need genuine dialogue and a real effort to understand the other person's perspective.

"Beyond the Gig Economy: Building Inclusive, Hybrid Workforces in the Age of AI and Human Intelligence"...

The gig economy is evolving into a hybrid, open-talent ecosystem where freelancers, contractors, AI agents and full-time employees collaborate in fluid, dynamic teams. While this shift unlocks flexibility, innovation and access to global talent, it also exposes new challenges in equity, governance and inclusion.

The next frontier of work lies not in dismantling traditional employment, but in designing systems where human and artificial intelligence coexist ethically, inclusively and sustainably.

A new lens on diversity and inclusion is needed: one that recognises the complexity of the "augmented workforce":

Equity-by-design: Embed fairness into AI systems and open-talent algorithms.

Accessible opportunity: Build pathways for underrepresented freelancers into high-value gig ecosystems.

Digital belonging: Foster inclusion for virtual, task-based workers through shared purpose, transparency, and ethical leadership.

AI literacy as inclusion: Equip workers at all levels to collaborate with AI agents confidently.

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2.

Inside the Global IT Outsourcing Market

Who uses outsourcing and where: global patterns and adoption

Who uses outsourcing and where: global patterns and adoption

As IT outsourcing, subcontracting, and platform-based work models continue to scale globally, understanding **who uses these services and where they are concentrated** becomes critical. The market is not uniform—both demand and supply are geographically and structurally distributed, with clear patterns across industries, company types, and regions. These dynamics help explain how organizations design their sourcing strategies and where untapped opportunities remain.

Company types and adoption patterns

Outsourcing is widely adopted across organizations of different sizes and maturity levels, although the underlying drivers vary.

At the enterprise level, large organizations—particularly in industries such as financial services, telecommunications, and retail—use outsourcing as a **strategic tool for cost optimization, scalability, and access to global talent**. These companies often operate multi-vendor models and distribute work across different regions.

Technology companies and digital-native firms, including SaaS and fintech players, tend to rely on outsourcing primarily for **speed and access to specialized skills**. For them, external partners such as software houses or external teams serve as an extension of internal capabilities, enabling faster product development and iteration.

Mid-sized companies and startups, on the other hand, often use outsourcing to **compensate for limited internal resources**. In these cases, outsourcing enables rapid scaling without the need for long and costly hiring processes, especially for short-term or project-based work.

Geographic distribution: demand vs. supply

The global outsourcing market is characterized by a clear geographic split between **demand (client markets)** and **supply (talent hubs)**.

Demand is concentrated primarily in developed economies, with the **United States, the United Kingdom, and Western Europe** representing the largest consumers of outsourcing services. These regions face ongoing talent shortages and high labor costs, which drive the need for external partners from more cost-effective locations.

On the supply side, outsourcing services are delivered from a diverse set of global talent hubs. **India and Southeast Asia** remain dominant in terms of scale and cost efficiency, particularly for large-volume IT and business process services. At the same time, **Central and Eastern Europe (including Poland, Romania, Bulgaria and Ukraine)** has emerged as a key region for high-quality, complex IT work, offering strong technical expertise and closer cultural and time-zone alignment with European clients. **Latin America** is also gaining importance as a nearshoring destination, particularly for North American companies seeking real-time collaboration.

Survey



The **“IT Outsourcing Trends Survey”**, conducted by Talent Alpha within its own ecosystem of companies, included participation **from over 50 organizations worldwide**. The represented countries included **Albania, Belgium, Bulgaria, Croatia, Estonia, Germany, Hungary, India, Romania, Sweden, Switzerland, Ukraine, the United Kingdom, and the United States**, along with a significant number of respondents from **Poland**.

Company size structure:

- **SMEs dominate** – around **75%** of the sample are companies with 10–249 employees.
- **Largest group: 10–49 employees** – nearly **half of all respondents**.
- **Limited presence of large companies** – only ~**11%** have more than 250 employees.

Respondent seniority structure:

- **Strong representation of decision-makers** – over **56% of respondents** are Senior Managers and C-level executives.
- **Well-represented strategic perspective** – the presence of Owners/Founders and VPs further strengthens the business viewpoint.
- **Lower share of non-managerial specialists** – less than **25%** are mid- and senior-level (non-managerial) roles.

4 What types of cooperation does your company offer?

Body leasing / specialist outsourcing: **23%**

Full (end-to-end) projects: **23%**

IT consulting: **22%**

Team leasing / full team outsourcing: **21%**

Managed services: **9%**

Other: **2%**

- **Diverse service offering** – no single dominant model; four main cooperation types have a very similar share (~21–23%).
- **Strong outsourcing focus** – body leasing and team leasing together represent the largest portion of services.
- **Relatively low share of managed services** – only ~9%, suggesting lower maturity in long-term service models.

Conclusion: companies offer a broad range of services, with a clear emphasis on flexible outsourcing and project-based models.

2 On average, how many specialists do you assign to a single project under your outsourcing model?

4–10 specialists: **48%**

1–3 specialists: **40%**

11–20 specialists: **6%**

20+ specialists: **6%**

- **Dominance of small and mid-sized teams** – nearly **90%** of projects involve up to 10 specialists.
- **Most common model: 4–10 specialists** – indicating a preference for scalable yet still agile team structures.
- **Limited share of large teams** – projects with more than 10 specialists account for only ~**12%**.

Conclusion: outsourcing engagements are typically delivered through relatively small, flexible teams rather than large-scale deployments.

3 In your opinion, why do clients choose the body leasing / outsourcing model for specialists or teams?

Flexibility and quick response to business needs: **26%**

Seasonality or short-term projects: **21%**

Ability to start a project quickly: **20%**

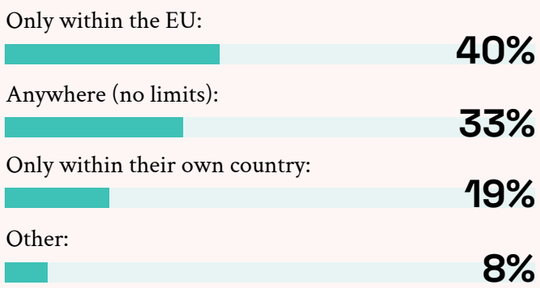
Lack of available specialists in-house: **17%**

Reduction of employment costs (lower fixed costs): **16%**

- **Flexibility is the key driver** – the most frequently indicated reason.
- **Speed and adaptability matter** – quick project start and short-term needs together form a significant share.
- **Talent gaps still important** – lack of in-house specialists remains a major factor.
- **Cost is secondary** – financial optimization is less important than agility and access to skills.

Conclusion: companies offer a broad range of services, with a clear emphasis on flexible outsourcing and project-based models.

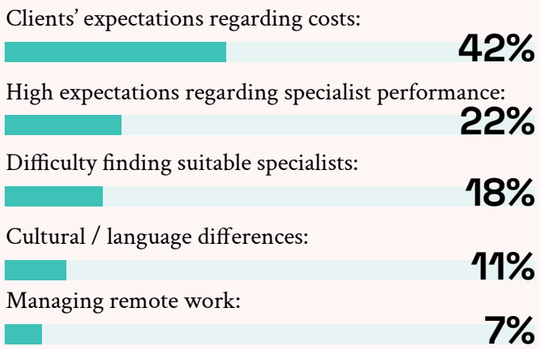
4 What preferences regarding the location of outsourcing services do you observe among your clients?



- **Preference for EU-based outsourcing** – the most common choice (~40%), likely driven by regulatory alignment and proximity.
- **High openness to global delivery** – nearly **one-third** of clients have no location restrictions.
- **Limited preference for domestic-only service**s – fewer than **20%** restrict outsourcing to their own country.

Conclusion: while EU-based outsourcing is preferred, clients remain largely open to global collaboration models.

5 What are the key challenges in providing body leasing services for your clients?



- **Cost pressure is the main challenge** – over **40%**, clearly the dominant issue.
- **High performance expectations** – clients expect outsourced specialists to perform above in-house standards.
- **Talent availability still matters** – finding the right specialists remains a significant challenge.
- **Operational challenges are less critical** – cultural differences and remote work management play a smaller role.

Conclusion: the biggest challenges are driven by client expectations—especially around cost and performance—rather than operational or logistical factors.

More detailed analysis of the survey can be found in Chapter 4.

3.

Voices from the Regions: Perspectives of Entrepreneurs

Romania

PREPARED BY: WEASWEB Delivering AI

1. Market Snapshot

Market size: around:
23.6 billion USD

Number of IT specialists:
250,000+ specialists

Share of outsourcing in exports/GDP:
6.67%

2. Market Structure and Engagement Models

Dominant delivery models: Staff augmentation (especially for product companies scaling teams), Project-based delivery (fixed scope or time and materials), Managed services (less dominant vs. Poland/Czech, but common in support/ops, cloud, QA).

Typical clients: EU / UK mid-market and enterprises, plus US startups/scale-ups nearshoring to Europe.

Market maturity: Established nearshore market (long-running delivery centers, strong export footprint).

3. Talent and Skills

Backend: Java/Spring, .NET, Node.js, increasingly Python (data/AI).

Frontend: React/Angular, mobile iOS/Android.

Cloud/DevOps: AWS/Azure/GCP, Kubernetes, Terraform, CI/CD.

QA: test automation + QA engineering, performance/security testing (varies by vendor mix).

Seniority distribution: Romania's outsourcing workforce tends to skew mid-to-senior in delivery roles, with juniors more present in larger hubs and service centers (use as qualitative positioning; hard national splits vary by dataset).

Work models: Hybrid/remote is mainstream; contracting via CIM (employment) and B2B (SRL/PFA) both exist (B2B especially common for seniors). Expect a meaningful share of freelance/B2B for high-demand skills.

4. Regulations and Risks

Ease of collaboration: generally high, because Romania is in the EU legal framework and operates with standard international contracting patterns.

Key considerations / blockers:

- GDPR compliance for any personal data processing (contractual + operational controls needed).
- Tax changes affecting IT net salaries (from Jan 2025): the income tax exemption for IT employees was abolished, increasing net-to-gross pressure and potentially pushing rates upward.
- Contracting model risk: if you engage many individuals via B2B long-term, ensure misclassification and compliance are handled properly (common across EU markets).

5. Market Differentiators – why Romania?

- EU member nearshore with cultural/timezone proximity to Western Europe.
- Strong STEM/engineering tradition, multilingual talent, good "value-to-quality" positioning.
- Proven export performance: ITandC is a top services export category (25.6% of services exports in 2024).
- Meaningful macro footprint: ~6.67% direct GDP contribution from ITandC.

Ukraine

PREPARED BY: LIGHT IT GLOBAL

1. Market Snapshot

Market size: around:
6.4 – 6.7 billion USD

Number of IT specialists:
240,000–250,000 specialists

Share of outsourcing in exports/GDP:
4%

2. Market Structure and Engagement Models

Dominant delivery models: staff augmentation, project-based delivery, managed services.

Typical clients: Funded tech startups (Seed to Series C), Scale-ups and mid-market technology firms, Enterprise clients undergoing digital transformation.

Market maturity: Ukraine is no longer an "emerging" cheap labor market. It is a mature engineering hub with complex delivery capabilities and a developed legal ecosystem.

3. Talent and Skills

Backend: Java, Python, .NET, Node.js, PHP.

Frontend: React, Angular, Vue.

Mobile: Flutter, React Native, Swift, Kotlin.

Cloud and DevOps: AWS, Azure, GCP, Kubernetes, Docker.

Data and AI: Machine Learning, Computer Vision, NLP, Data Engineering.

Cybersecurity and Blockchain solutions

Growing demand areas include AI/ML engineering.

Seniority distribution: Junior: ~12–15% (Significant decrease in junior hiring; market is saturated with entry-level talent). -Middle: ~45% -Senior/Lead: ~40%.

Work models: Predominantly remote or hybrid. B2B contractor model is standard (individual entrepreneur framework widely used). Highly adapted to distributed and cross-border collaboration.

4. Regulations and Risks

Key enablers include:

- A mature B2B contractor framework.
- The Diia City legal regime offering favorable tax conditions, IP protection, and structured IT regulation.
- Strong experience working under GDPR, HIPAA, ISO 27001, and other international standards.
- High English proficiency across technical teams

Risks and challenges:

- Ongoing geopolitical risks.
- Travel restrictions for certain categories of specialists.
- Operational disruptions mitigated through distributed teams, backup power systems, and satellite connectivity.
- Despite energy infrastructure attacks, the industry maintains 95%+ delivery continuity due to widespread use of Starlinks, generators, and autonomous office hubs.

5. Market Differentiators – why Ukraine?

- Resilience as a service: The ability to deliver under extreme conditions has created a reputation for unmatched dedication.
- Engineering culture: Strong STEM education focuses on problem-solving and math, not just coding syntax.
- Value for money: Rates are in the „mid-range" (lower than Poland/Czechia, higher than India/Philippines) but with quality comparable to Western Europe.

Bulgaria

PREPARED BY: elando

1. Market Snapshot

Market size: around:
5 billion USD

Number of IT specialists:
120,000–130,000 + specialists

Share of outsourcing in exports/GDP:
5.8%

2. Market Structure and Engagement Models

Dominant delivery models: The Bulgarian IT market is predominantly service-oriented, with the most common models being staff augmentation, dedicated teams, project-based delivery, and end-to-end partnerships focused on solving business problems.

Typical clients: Historically, many providers operated within longer international delivery chains as Tier 2–Tier 4 partners. Over time, there has been a shift toward more direct client relationships and greater ownership of full project delivery.

Market maturity: The ecosystem is well established, with 800+ companies across IT services, BPO, and RandD. Growth has moved from rapid expansion to more stable, mature levels.

3. Talent and Skills

Popular tech stacks and core competencies: JavaScript, .NET, Java, Python, SQL, and mobile development.

Seniority distribution: leans toward mid-level and senior professionals, reflecting more than two decades of outsourcing activity.

Work models: Remote and hybrid work models are standard, with a mix of employment and B2B contracting at senior levels.

4. Regulations and Risks

Bulgaria offers a stable legal environment as an EU member state, with strong IP protection, GDPR compliance, and straightforward cross-border contracting. Foreign ownership is allowed, and the 10% flat tax structure supports a business-friendly climate.

Challenges include:

- Talent shortages in certain specializations, creating pressure on salaries and limiting team scaling.
- Political instability since 2021, creating periods of uncertainty.
- Education system lagging behind industry demand, requiring investment in training and junior development.

These factors affect growth pace rather than operational reliability.

5. Market Differentiators – why Bulgaria?

Bulgaria's strengths include technical capability, global delivery experience, and economic positioning.

Key points:

- Strong STEM education base.
- High English proficiency.
- Time zone alignment with Europe.
- EU membership providing legal stability.
- Competitive cost-to-quality ratio.

Poland

PREPARED BY: FABRITY

1. Market Snapshot

Market size: around:
34.87 billion USD

Number of IT specialists:
450,000 specialists

Share of outsourcing in exports/GDP: There is no single unified indicator specifically for IT outsourcing. The BSS sector (including IT) contributes approximately 5.7% to GDP, with services exports amounting to around USD 42.3 billion.

2. Market Structure and Engagement Models

Dominant delivery models: staff augmentation; project-based delivery (TandM/fixed price); managed services.

Typical clients: mid-market and enterprise companies (EU/UK/USA), as well as startups (with a smaller share in terms of total market value).

Market maturity: established and mature IT and BSS services market (over 2,000 service centers in Poland in 2025).

3. Talent and Skills

Popular tech stacks and core competencies: SQL, JavaScript, Python, TypeScript, HTML/CSS, Java, C#.

Seniority distribution: Junior 11.2%; Regular 45.0%; Senior 32.9%; Tech Lead/Team Lead 9.7%.

Work models: 59.9% fully remote; 19.2% work remotely 3–4 days per week; 12.4% work remotely 1–2 days per week; 8.6% do not work remotely. The most popular cooperation model: B2B.

4. Regulations and Risks

Key Enablers:

- EU membership and legal alignment (stable, predictable regulatory framework).
- Strong GDPR-based data protection standards.
- Flexible B2B cooperation model widely used in IT.

Major Risks:

- Rising labor costs (typical annual increases of 5–10%).
- Strong competition for senior specialists.
- Wage pressure in high-demand niches.

Regulatory Risks:

- EU AI Act compliance obligations (especially for high-risk AI systems).
- GDPR cross-border data transfer requirements (SCCs and safeguards for non-EU clients).
- NIS2 cybersecurity compliance requirements.

5. Market Differentiators – why Poland?

- Large talent pool (450,000 specialists working in the IT sector).
- High-quality expertise—Polish developers are ranked among the top globally.
- Established market with a mature IT services ecosystem.
- Cultural proximity to Western Europe and the United States.
- High English proficiency in the IT sector.

Expert view



Joanna Nalepa
Labour Market Specialist,
Invest in Pomerania

As part of the Invest in Pomerania initiative, we are observing how traditional outsourcing is giving way to ‚expert-on-demand' models.

Pomerania is attracting high-class IT and creative industry specialists who are increasingly combining project flexibility with long-term choices about where to live and work.

The region offers modern digital infrastructure, academic facilities, and a developed ecosystem of software houses and coworking spaces. This allows acquired skills to quickly adapt to economic needs, shortening project implementation times, and increasing productivity.

Independent experts are an important element of the local innovation ecosystem. The gig economy doesn't replace full-time employment, but complements it, strengthening the flexibility of the labor market and its resilience to economic fluctuations.



Katja Ložina
Head of the Investor Relations Department,
Poznań City Hall

The dynamic changes taking place in the IT market are equally reflected in Poznań and the Wielkopolska region. Flexible business models have become integral to the relationship between companies and their clients.

Talent outsourcing for global projects remains a particularly popular practice. In Poznań, these solutions are provided by investors, such as Sii, Capgemini and Sollers. These mechanisms enable rapid responses and the scaling of teams with the appropriate skills, tailored to the needs of external clients, significantly impacting the effectiveness of ongoing projects.

Outsourcing is an important way of providing services in the IT market, raising its attractiveness. As such, Poznań remains a key technology hub not only in Poland but also in Europe. The city is characterised by a highly mature market and a skilled workforce capable of delivering international projects to the highest standards. Furthermore, a favourable business environment and well-developed infrastructure support the sector's continued growth.

4.

Rethinking Work: Opportunities and Challenges Ahead

How would you describe the current global IT outsourcing landscape?



Julita Iks
CEO, Talent Alpha

How would you describe the current global IT outsourcing landscape?

JI: The market is more dynamic than ever. Companies can access specialized skills globally, combining in-house teams with external software houses, agencies, freelancers, and curated marketplaces like Talent Alpha. Yet, we still see **untapped potential**: some clients have long decision-making processes, limited pricing flexibility, or misconceptions about cost. When approached strategically, outsourcing can often be cost-effective—or even more efficient—than hiring full-time staff, but many organizations underestimate this.

What makes Talent Alpha different from other talent or freelance platforms?

JI: Talent Alpha is a **talent marketplace** that connects companies with **verified software houses and their available specialists**. Unlike generic freelance platforms, we don't match individual freelancers; we **delegate specialists from our partner software houses**, effectively utilizing their bench resources. This creates a **win-win situation**: companies get skilled professionals quickly, while software houses secure meaningful projects for their staff. It's a highly efficient way to scale projects while keeping quality high and costs predictable.

How do you see the role of talent marketplaces evolving?

JI: They are becoming strategic workforce tools. Beyond temporary projects, curated marketplaces will be central for innovation, agility, and global expertise. The companies that move faster and understand the value of external teams—especially in models that leverage existing bench capacity—will unlock opportunities that others may miss.

From your experience, in which situations do clients benefit most from outsourcing?

JI: Clients typically benefit from outsourcing when they need to **fill temporary project roles** while recruiting permanent team members, or when they face **urgent capacity gaps** due to tight deadlines, absences, or team changes. It's also ideal when organizations require **specialized skills not available in-house**, or when they want a **cost-effective way to scale their teams quickly**. Many clients adopt a **hybrid model**, keeping part of the team in-house while outsourcing selected roles. Additionally, hiring a full-time specialist is often inefficient, making outsourcing the most practical solution for short-term projects.

What advice would you give companies adopting a marketplace-based outsourcing strategy?

JI: Prioritize quality and trust. Choose platforms with vetted providers and structured engagement models, and think about how external teams integrate with internal processes. Recognize the broader value: **outsourcing is not just a cost—it's a strategic lever**. Leveraging pre-vetted specialists from partner software houses is particularly effective for scaling quickly while maintaining high project standards.

talent alpha

1 Platform, 1 Contract,
1000 IT Service Providers

Your all-in-one platform for finding IT talent
and discovering new technology projects

Get tech talent on demand
Share your talent

www.talent-alpha.com



Expert view



Agnieszka Porębska
Director, PwC Consulting
– Sensitive Transformations



Stefan Schwarz
Co-Founder & President
European Labour Mobility Institute (ELMI)

Adopting flexible ways of working – such as outsourcing, gig work, or mission-based roles – may offer strategic advantages by enhancing a company's adaptability and resilience but often encounters significant internal resistance. It is not just an operational shift but a fundamental cultural transformation.

If handled poorly, this change can erode trust and morale. Organizations that want to protect their brand and maintain employee motivation need to build on four essential pillars – **4 Ts: Transparency, Time, Tactical approach, and Taking care**.

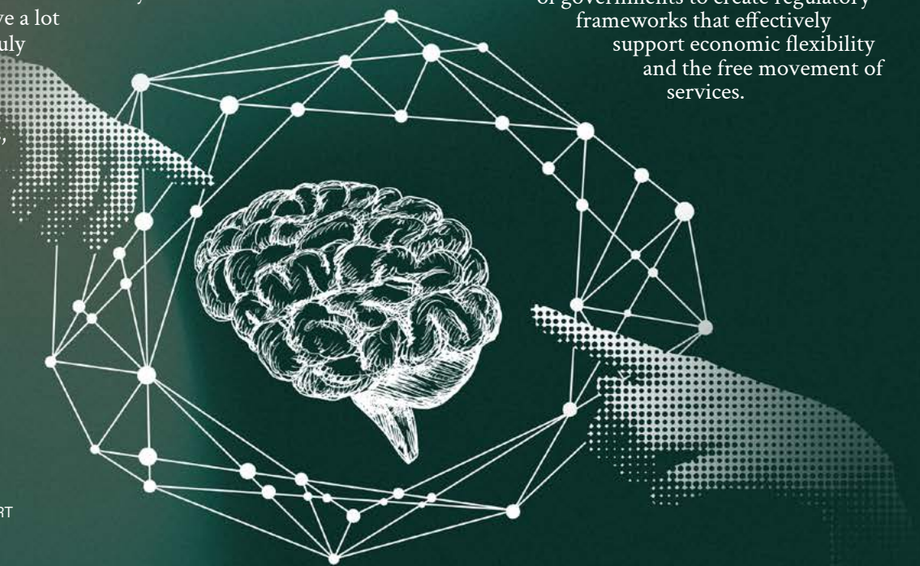
Transparency – helping people understand reduces anxiety, resistance, fear, and distrust. **Time** gives employees the space to navigate the natural stages of the change curve – from denial, anger, and fear to exploration, engagement, and integration. Effective **tactics**, including thorough planning and coordination, reduce disruption and mistakes. **Taking care** builds mutual trust – you cannot expect people to by committed to a company that doesn't care about them; on the other hand – they can endure and forgive a lot when they feel you truly care.

When organizations apply these principles, they can transition to more flexible and resilient models without internal revolts or costly consequences.

Flexible forms of work organization—such as outsourcing, subcontracting, and cross-border service delivery—are increasingly becoming a key driver of competitiveness in knowledge-based economies. According to OECD and World Economic Forum data, more than 40% of companies plan to further expand their use of outsourcing and project-based collaboration, while the global IT outsourcing market has already surpassed USD 500 billion.

At the same time, a widening gap is emerging between the pace of market transformation and the speed of regulatory adaptation. In Europe, labor mobility remains a cornerstone of service exports. In Poland alone, approximately 850,000 A1 certificates are issued annually, with up to 25% concerning workers from outside the European Union. However, the experience of companies affiliated with the Polish Services Exporters Coalition suggests that administrative barriers to worker mobility may constrain the development of modern work models

The debate on the future of work should therefore extend beyond technological innovation and employment models to include the ability of governments to create regulatory frameworks that effectively support economic flexibility and the free movement of services.



Expert view



Maciej Stopierzyński
CEO, DoxyChain



Wiktor Doktór
CEO, Pro Progressio

DoxyChain is a blockchain-based platform enabling the creation and management of digital certificates and micro-credentials.

We operate in an environment where demand for specific skills shifts rapidly and client expectations evolve continuously, requiring fast and effective responses. That's why we use a hybrid model - combining a core in-house team with flexible external expertise. By partnering with Talent Alpha, we can quickly scale capabilities and adapt resources to current needs, while maintaining control over key areas. This approach allows us to stay agile while ensuring high quality and faster time-to-market.

We are able to effectively manage the risk of incurring fixed costs without knowing what skills we will be lacking in our core development team as we expand our product.

The IT industry is an area of the global economy that has undergone, and continues to undergo, profound changes and transformations over the past decade. It's undeniable that the development of automation and artificial intelligence, which has become a tool in the hands of many people, has influenced the current shape of the IT sector.

People with middle and senior skills are in a comfortable position, as their experience is in high demand. The situation is somewhat different for junior positions. Demand has declined, meaning such skills can be acquired at slightly more favorable prices than just two or three years ago.

IT outsourcing is a service that remains in demand. There's no indication that this trend will change. However, it's worth remembering that new countries, and even entire continents, are gaining ground on the global IT services landscape. Currently, we're seeing growing activity from IT service providers (software development, automation, AI) from Africa.

IT Outsourcing Trends Survey: Future Insights

What factors determine whether a client returns to your company for future projects?

Quality of specialists: 35%

Communication / project support: 25%

Price / flexible billing models: 21%

Responsiveness in deploying a team: 18%

Other: 1%

- **Quality is the top driver** – over **one-third** of responses, making it the most critical factor.
- **Strong importance of communication** – nearly **25%**, highlighting the role of collaboration and support.
- **Price matters, but is not dominant** – cost is secondary to quality and relationship factors.
- **Speed still relevant** – responsiveness contributes meaningfully but is less decisive.

Conclusion: client retention is primarily driven by **quality and effective collaboration**, with pricing and speed playing supporting roles.

Have you noticed changes in client preferences in recent years?

Shift toward cost-effective locations: 46%

Preference for local specialists: 31%

No significant change: 23%

- **Cost optimization is the leading trend** – nearly **half of respondents** observe a growing demand for specialists from more cost-effective regions.
- **Local preference still relevant** – around **31%** of clients increasingly favor local talent.
- **Moderate stability in the market** – about **23%** see no major changes in preferences.

Conclusion: while cost efficiency is the dominant trend, a significant share of clients continues to value local proximity, indicating a balance between global optimization and localtrust.

Do you plan to expand your outsourcing services into new markets, industries or technologies within the next 2–3 years?

Yes, all of them: 33%

Yes, new markets: 27%

Yes, new technologies: 14%

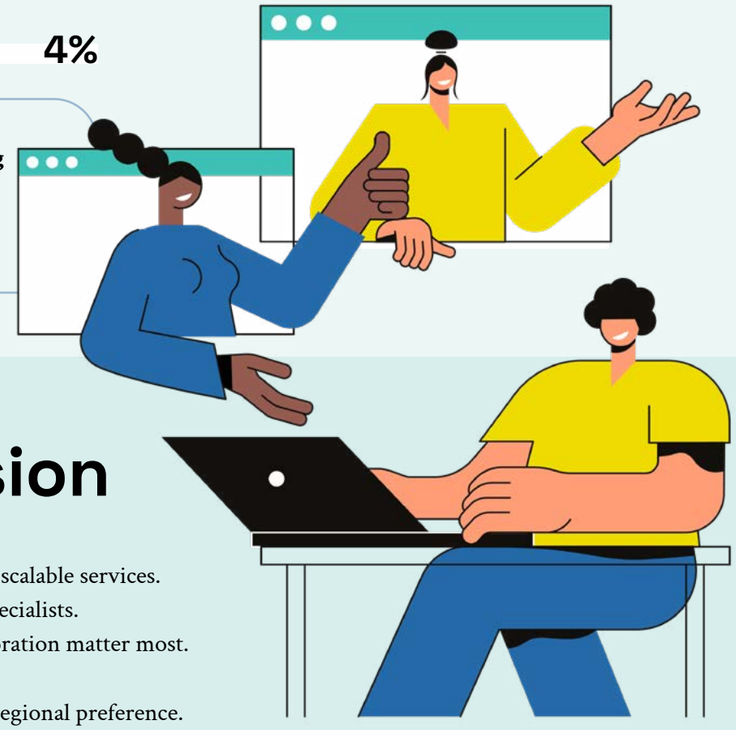
Yes, new industries: 11%

Not decided yet: 11%

No: 4%

- **Strong growth ambitions** – over **70%** of companies plan expansion in at least one area.
- **Holistic expansion is common** – the largest group (~**33%**) aims to grow across markets, industries, and technologies simultaneously.
- **New markets as a priority** – geographic expansion is the most frequently selected single direction.
- **Very low resistance to growth** – only ~**4%** do not plan expansion.

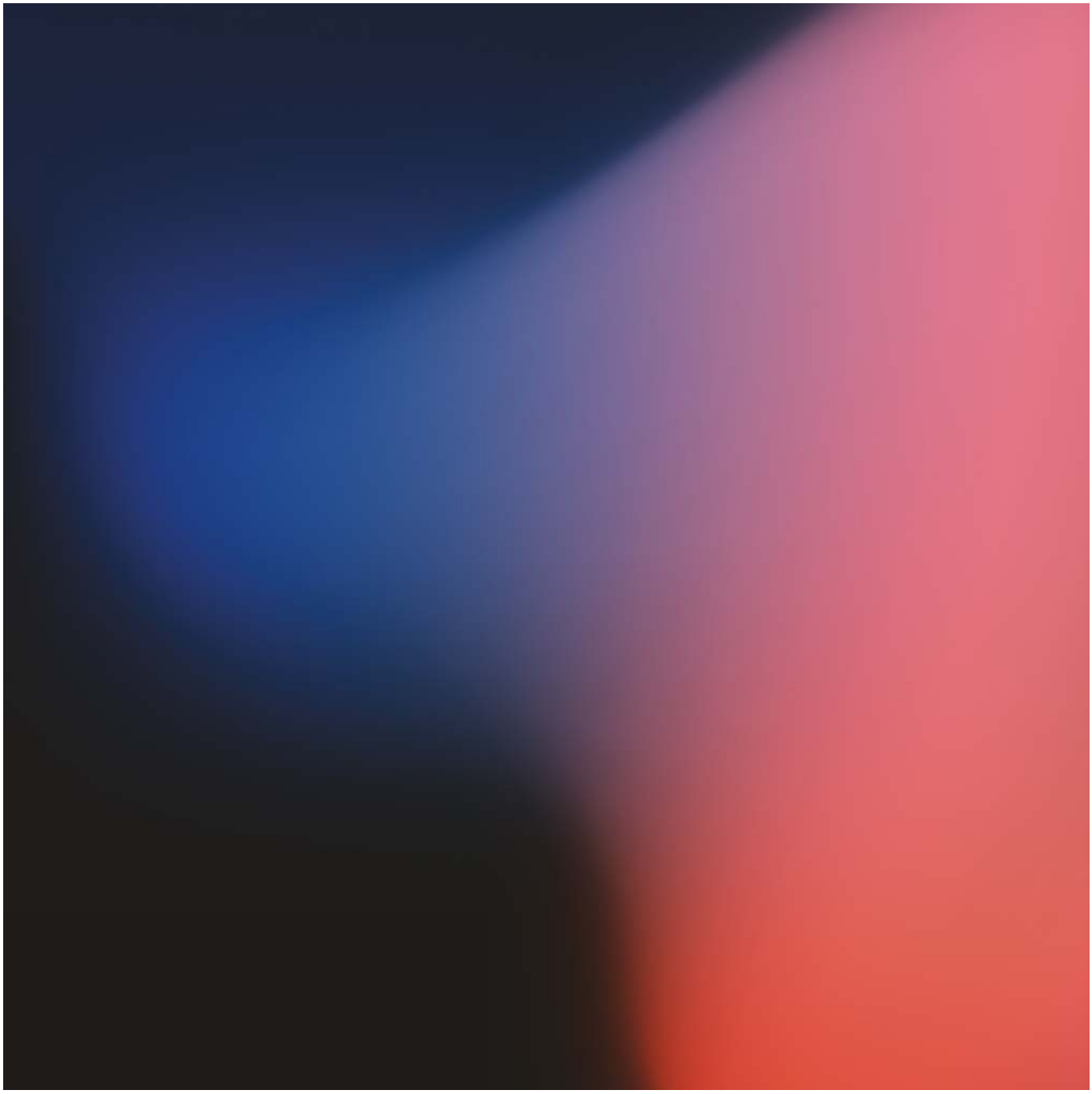
Conclusion: the market shows a **strong expansion mindset**, with companies actively seeking growth opportunities across multiple dimensions.



Final conclusion

- **Flexible outsourcing models** – diverse, scalable services.
- **Small, agile teams** – typically up to 10 specialists.
- **Quality over cost** – expertise and collaboration matter most.
- **Cost pressure** – key ongoing challenge.
- **Global with EU focus** – openness with regional preference.
- **Efficiency-driven shift** – demand for cost-effective flexibility.
- **Strong growth plans** – expansion across markets and technologies.

The survey shows that IT outsourcing is evolving into a **mature, strategically driven market**, where **quality, flexibility, and speed** are key success factors. At the same time, companies must continuously balance these with **cost expectations**, while actively pursuing **growth and international expansion**.



The Future of Work Report 2026

Produced by talent alpha

Editor in Chief:
Julita Iks (julita.iks@talent-alpha.com)
Joanna Robaszkiewicz (joanna.robaszkiewicz@talent-alpha.com)

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