

#CEEAIChallenger 2026

Central Eastern European perspective on AI

September 2026

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Foreword

Artificial intelligence is no longer a technology of the future. It is already becoming one of the most important drivers of economic growth, productivity and technological competitiveness. The choices Europe makes today will determine how quickly we adopt AI, but also where the economic value created by this technology will be generated.

For Central and Eastern Europe, this is a particularly important moment. Our region has talent, strong engineering capabilities, a growing technology sector and a significant industrial base. But potential alone is not enough. We need the right conditions to turn these assets into investment, innovation and large-scale deployment of AI.

The question we should be asking is how we can create the conditions for European companies to develop, adopt and scale AI successfully.

The #CEEAIChallenger 2026 series was created to address this question. Bringing together representatives of business, government, academia and the technology sector across Central and Eastern Europe, the initiative provided a platform to look at Europe's AI challenge from the perspective of our region. The discussions showed that many of the challenges we face are shared: insufficient scale of investment, uneven adoption of AI, regulatory complexity and fragmentation, and the need to turn national technology ambitions into effective implementation.

At the same time, the discussions demonstrated that CEE should not approach these challenges individually. Our region's strength lies in cooperation. By coordinating our priorities, sharing best practices and building stronger connections between our markets, companies, universities and governments, we can create opportunities that would be difficult to achieve at the national level alone.

This report brings together the main conclusions from the #CEEAIChallenger 2026 series and translates them into practical recommendations, tied into a message that Europe needs to move from ambition to execution, and that CEE has an important role to play in making that happen.

We do not need to replicate Silicon Valley. We need to build on what our region already does well, remove the barriers that prevent companies from scaling, and ensure that European policies support rather than constrain innovation.



Michał Kanownik
President, Digital Poland
Association



01.

Introduction

AI as a strategic opportunity for Europe — and for CEE

Artificial intelligence is rapidly becoming a general-purpose technology with the potential to reshape productivity, competitiveness and economic growth across virtually every sector of the economy. The scale of the opportunity is substantial. If Europe develops and adopts AI in line with its existing capabilities, the technology could generate up to €2,7 trillion in additional economic output by 2030 — equivalent to around 20% of the continent's current economic output. If Europe was to close more of the gap with the United States in AI capabilities, the potential could rise to approximately €3,6 trillion¹.

The economic race around AI is already well underway. Global corporate investment in AI reached USD 581,7 billion in 2025, while private AI investment reached USD 344,7 billion. Yet investment remains highly concentrated. The United States attracted USD 285,9 billion of private AI investment in 2025, more than 23 times China's USD 12,4 billion and almost 49 times the United Kingdom's USD 5,9 billion. Europe also saw significantly slower growth in private AI investment than the US in 2025². This gap matters because investment finances technology development, but also because it increasingly determines access to computing capacity, talent, infrastructure and the ability to scale successful companies.

For Europe, AI is increasingly a question of economic competitiveness and productivity. Europe's ability to remain a major industrial and technological power will depend on whether it can turn its strengths in research, engineering, manufacturing and human capital into widespread AI development and adoption. The challenge is particularly urgent as the global AI race increasingly combines private capital, computing infrastructure, industrial deployment and talent at unprecedented scale.

1 McKinsey & Company, AI in Europe: Tackling the gap, access: <https://www.mckinsey.com/featured-insights/artificial-intelligence/tackling-europes-gap-in-digital-and-ai>

2 Stanford Institute for Human-Centered Artificial Intelligence, AI Index Report 2026, access: <https://hai.stanford.edu/news/inside-the-ai-index-12-takeaways-from-the-2026-report?locale=en>

Why CEE matters

Central and Eastern Europe has a particularly important role to play in this transformation. The region is home to almost 100 million people and accounts for 12,3% of EU GDP, while its ICT sector has become an increasingly important driver of economic growth. Across the 11 CEE countries covered by the CEE Digital Coalition's 2024 report, the ICT sector accounts for almost 5% of regional GDP and around 1,64 million jobs³.

CEE also has several characteristics that can become significant competitive advantages in the AI era: a large industrial base, strong engineering capabilities, a growing technology ecosystem and a substantial pool of ICT talent. The region has already demonstrated strong momentum in digital services: exports of commercial ICT services from CEE economies increased more than sixfold between 2005 and 2021, while the region has a higher density of ICT enterprises than Western Europe³.

AI could amplify these existing strengths. The opportunity for CEE does not necessarily lie in competing head-on with the United States or China to build the world's largest frontier AI companies. It lies in turning the region's industrial, technological and human-capital strengths into a competitive advantage in AI deployment, applied innovation and industrial transformation. Recent McKinsey analysis estimates that AI could unlock €280-700 billion of economic value across Central Europe, equivalent to approximately 6-15% of the region's total net turnover, with particularly significant opportunities in advanced manufacturing, consumer goods and retail, technology, engineering, energy and logistics⁴.

This makes CEE's AI trajectory relevant far beyond the region itself. A more productive and technologically competitive CEE would strengthen Europe's industrial base, expand its pool of AI talent and innovation, and help create a larger market for European technology companies. Conversely, if the region struggles to attract investment, adopt AI at scale or translate research into commercial applications, Europe risks leaving a significant part of its economic potential underused.

³ CEE Digital Coalition & PwC, The ICT Sector in the CEE Countries as a Regional Driver of Growth, access: https://ceedigital.org/assets/pdf/CEE_Digital_Coalition_Report_2024.pdf

⁴ McKinsey & Company, Capturing Central Europe's AI opportunity, access: <https://www.mckinsey.com/capabilities/quantumblack/our-insights/capturing-central-europes-ai-opportunity>

#CEEAIChallenger 2026: A CEE perspective on Europe's AI future

To address these opportunities and challenges #CEEAIChallenger 2026 brought together policymakers, industry representatives, technology experts, researchers and other stakeholders from across Central and Eastern Europe to examine the conditions needed for the region to contribute fully to Europe's AI ambitions.

The initiative comprised a series of regional roundtables held in Bucharest, Prague, Vilnius and Bratislava, followed by a final discussion in Brussels. The conversations focused on interconnected dimensions of Europe's AI challenge: scaling investment, accelerating AI adoption, creating a smarter regulatory environment, and translating national technology strategies into implementation and industrial deployment.

This report brings together the key conclusions and recommendations emerging from that regional perspective. Its central premise is that Europe's AI competitiveness will depend not on a single policy intervention, but on whether investment, adoption, skills, infrastructure, regulation and technology strategies reinforce one another.

CEE'S AI POLICY SHIFT: WHAT COMES AFTER THE RULEBOOK

Sharpening global competition has left the European Union defending a regulatory agenda amassed over a decade while holding on to its standing as a place where innovation is still worth locating.

Within the current legislative cycle, a series of initiatives has sought to preserve this dual ambition with the Digital Omnibus sitting at the centre of the response. Presented in November 2025, it takes on a body of digital law that companies had long complained was too complex to work with and a drag on the pace of innovation, recasting selected GDPR provisions, streamlining incident reporting and reopening the cookie rules. The Omnibus's part on AI moved faster and entered into force in July 2026, six days before the high-risk systems' obligations it defers fell due. June had already brought the Tech Sovereignty Package, covering semiconductors, cloud and computing capacity, open source and the digitalisation of energy.

Together these set the terms of the present debate, which is about both simplification and strategic autonomy in the digital sphere. Central and Eastern Europe has the talent and holds the industrial base where AI deployment would tell soonest, which is why these discussions land differently there. The underlying question is how to make digital rules coherent without forfeiting the competitiveness of the companies that must follow them.

Bringing the practical perspective of CEE business into Brussels debates therefore matters at every stage of the legislative process, and forums such as Business & Science Poland help keep the regional voice in these discussions worth having.

All of this points to the more consequential policy change of the past year. Europe spent a decade writing the rules, and those rules still stand. Keeping pace though has become a question of capacity, sovereignty, competitiveness and innovation.

FROM RULES TO CAPABILITY

Europe's AI policy has widened from regulating AI to building the infrastructure without which AI does not exist, and to creating the market demand that makes such infrastructure worth building. Cloud and AI Development Act and Chips Act 2.0 are about capability. The reality check is that the Union still sits at roughly 9% of the global chip market while chasing a 20% target for 2030.

Technological sovereignty is, at its best, a test whether Europe can rely on infrastructure, services, tools and supply chains that remain available when pressure comes, and whether the EU can secure that without undermining business as usual.

Sovereignty on that reading is capacity, and procurement is where it gets bought. That is also the answer to the argument that sovereignty does not mean protectionism as it translates to resilience and freedom of choice.

The bottleneck sits however in implementation rather than in ambition. Europe cannot triple its data centre capacity and hold its own against global players if basic infrastructure decisions take half

a decade, which is why faster permitting for data centres and swifter investment processes count for more than the headline figures. Tech Sovereignty is directionally important, but it will only become credible once sovereignty is translated into capacity.

From a CEE perspective the message is blunt. AI leadership hinges on who has the GPUs, the grid connections, the data centre capacity, the permitting speed and the industrial demand.

In parallel, there is an AI adoption gap across the region, and it strengthens the case for a joint regional strategy, since CEE markets together carry enough weight to shape policy files on their own terms. Pooled, the region can muster larger investment ecosystems and present a coherent stance letting its members play to their strengths. The region's difficulty has rarely been the quality of its problem identification but turning up in Brussels early enough, and with one voice, for these diagnoses to reach the decision-makers. That is beginning to change, as more of the thinking now reaches Brussels through industry associations from across CEE, in rooms where organisations such as Business & Science Poland keep the conversation running.



Karolina Wiercioch,
Business & Science Poland



02.

Scaling AI Investment in CEE

From talent and innovation to scale

Central and Eastern Europe enters the AI race with important assets: a large pool of highly skilled technical talent, recognised research institutions, a growing startup ecosystem and competitive industrial capabilities. The region is increasingly producing companies capable of competing internationally. Yet these strengths have not translated into investment volumes comparable with those of the world's leading AI markets. The challenge is creating conditions in which successful companies can secure the capital required to scale.

The global investment landscape illustrates the scale of this challenge. In 2025, AI companies attracted USD 258,7 billion in venture capital globally, accounting for around 61% of the total value of global VC investment, up from 30% in 2022. Investment is also becoming increasingly concentrated. Deals exceeding USD 100 million accounted for around 73% of the total value of AI VC investment in 2025, while deals above USD 1 billion represented almost half of the total value of AI VC investment. The five largest deals alone accounted for almost USD 63 billion⁵.

The geographical concentration is equally striking. Companies based in the United States attracted approximately 75% of global AI VC deal value in 2025, equivalent to USD 194 billion. EU27-based companies attracted just 6%, or USD 15,8 billion; China accounted for 5% and the United Kingdom for another 5%⁵.

Europe has made progress, but its investment base remains fragmented and its capacity to finance companies at scale remains weaker than that of the United States. Between 2020 and 2025, AI accounted for 34% of US VC funding, compared with 18% in Europe. European investors remain important providers of capital in smaller funding rounds, but their participation falls to just 26% in AI deals above €25 million, with most late-stage capital coming from the United States and the United Kingdom⁶.

CEE reflects this wider European challenge particularly strongly. The region's venture capital market is growing: according to Invest Europe, VC investment in CEE almost doubled to €675 million in 2025, driven in part by an expansion of later-stage venture. CEE-based VC funds raised €548 million during the year⁷.

The implication is that CEE does not primarily lack ideas, talent or early-stage entrepreneurial activity. The region struggles with sufficiently deep financing chain capable of turning promising companies into globally competitive scale-ups.

5 OECD, Venture capital investments in artificial intelligence through 2025, access: https://www.oecd.org/en/publications/venture-capital-investments-in-artificial-intelligence-through-2025_al3752f5-en/full-report.html

6 StepUp StartUps Consortium, Funding the AI Economy: Strengthening Europe's Investment Capacity, access: <https://digital-strategy.ec.europa.eu/en/library/funding-ai-economy-strengthening-europes-investment-capacity>

7 Invest Europe, CEE exits reach €1.7bn in 2025 as trade sales drive second-best year on record, access: <https://www.investeurope.eu/news/newsroom/central-and-eastern-european-exits-reach-17bn-in-2025-as-trade-sales-drive-second-best-year-on-record/>

Key challenges

CEE has talent, but lacks scale-up capital

CEE starts from a position of considerable strength in terms of human capital, research and entrepreneurship. However, the region continues to struggle with access to capital, particularly at the scale-up stage, when promising companies need larger rounds to expand internationally.

This is part of a broader European problem. European investors are active in early-stage AI financing, but their participation declines sharply as companies require larger amounts of capital. The result is a financing gap precisely at the stage when companies need to build international sales, recruit specialised talent, invest in computing and data infrastructure, and compete for global market share⁶.

For CEE companies, this can mean seeking financing outside the region, and often outside Europe - once they reach a certain level of maturity. International capital can provide valuable resources, networks and market access. However, persistent dependence on external capital can also make it more difficult for CEE ecosystems to retain ownership, intellectual property, strategic decision-making and a larger share of the economic value created by successful technology companies.

Europe remains a fragmented investment market

Europe's investment capacity is weakened by fragmentation across national capital markets, investment ecosystems and business environments. AI companies need access to markets large enough to justify substantial investment, yet European capital and innovation remain distributed across national ecosystems.

The European Commission's analysis shows that more than two-thirds of European AI venture capital is concentrated in just ten metropolitan hubs. This creates a structural disadvantage for emerging ecosystems, including those in CEE, which need stronger connections to major European investment centres if they are to access the capital required for rapid growth⁵.

For CEE, regional cooperation can therefore be more than a political ambition. Connecting national markets, investors, universities, companies and public funding instruments could create an investment ecosystem with greater scale and visibility than any individual CEE market can provide.

Public and private financing should reinforce one another

Public funding remains essential where technologies are capital-intensive, risky or strategically important. However, public funding alone cannot create a sustainable AI investment ecosystem.

The objective should instead be to use public capital to crowd in private investment: reducing risk, developing investment pipelines, supporting companies through financing gaps and encouraging institutional investors and corporates to participate.

There is a strong economic rationale for this approach. Across the EU, business enterprises accounted for 56,7% of R&D funding in 2023, while governments provided 30,1%⁸. This illustrates the importance of private-sector participation in sustaining Europe's innovation base.

For AI, stronger cooperation between public and private capital is particularly important because investment requirements are increasingly concentrated in large growth rounds. A European financing system that supports companies only until the early stages of development risks creating companies that must subsequently look elsewhere for the capital needed to compete globally.

Lack of targeted AI scale-up funds

AI companies have financing requirements that can differ substantially from those of conventional technology startups. Advanced AI increasingly requires substantial expenditure on computing capacity, data, research talent and international expansion. The global investment data show how quickly the financing structure is changing: mega-deals above USD 100 million represented approximately 73% of AI VC investment value in 2025⁵.

CEE currently lacks sufficient dedicated investment vehicles capable of supporting companies at this scale. The region has developed a growing base of seed and early-stage investors, but the availability of larger growth capital remains considerably more limited.

Without targeted scale-up instruments, promising companies may receive support during the early stages of development but encounter a financing gap precisely when they begin to demonstrate global commercial potential.

8 Eurostat, R&D expenditure, access: https://ec.europa.eu/eurostat/statistics-explained/index.php?title=R%26D_expenditure

Relatively low R&D expenditure

The investment challenge is reinforced by relatively low R&D expenditure across parts of CEE. The EU spent €403 billion on R&D in 2024, equivalent to 2,24% of GDP. Yet seven EU Member States recorded R&D intensity below 1% of GDP, including several CEE economies: Romania (0,46%), Bulgaria (0,77%), Latvia (0,92%) and Slovakia (0,98%)⁹.

The gap is also visible in government R&D allocations. In 2025, EU governments allocated an average of €288,9 per inhabitant to R&D budgets. The corresponding figures were just €18,8 in Romania and €57,4 in Hungary⁹.

This does not mean that CEE lacks research capabilities. Rather, it highlights a challenge in converting research capacity into a sustained pipeline of commercially scalable technologies. Strong universities and researchers can generate valuable ideas, but without sufficient funding, industry partnerships and mechanisms for technology transfer, research excellence does not automatically translate into globally competitive companies.

The issue is broader than AI-specific funding. Investment in AI also depends on the wider innovation system, including R&D, skills, data, computing infrastructure and intellectual property.

⁹ Eurostat, EU R&D government allocations up by 61% in 10 years, access: <https://ec.europa.eu/eurostat/web/products-eurostat-news/w/ddn-20260807-2>

What CEE needs

Connect national ecosystems into a regional investment market

The relatively small size of individual CEE markets is a structural disadvantage, but the combined region represents a substantial economic and talent base. Regional cooperation can help overcome this limitation. Existing frameworks for cooperation, including the Three Seas Initiative, could provide platforms for coordinating investment priorities, developing cross-border financial instruments and connecting investors with technology companies across national borders. This approach is consistent with the broader conclusion emerging from the #CEEAIChallenger series: the region can benefit from a coherent strategy for AI investment, development and adoption rather than pursuing fragmented national approaches.

A more integrated CEE AI ecosystem would also make the region more visible to international investors. Rather than competing individually for capital, CEE countries could collectively present the region as a large, specialised and interconnected technology market.

Build a financing chain that supports companies beyond the startup stage

CEE needs to move from an ecosystem that is good at producing startups to one capable of producing scale-ups. This requires financing instruments that cover the full company lifecycle — from research and proof-of-concept, through seed and Series A financing, to growth capital and international expansion.

The objective should not be to replace private investment, but to ensure that promising companies do not fall into a financing gap between early-stage support and international scale.

Make public funding a catalyst for private capital

European and national public funding should be designed to attract additional private capital rather than operate in isolation. Co-investment mechanisms, guarantees, fund-of-funds structures and risk-sharing instruments can help institutional and corporate investors participate in AI financing while reducing some of the risks associated with emerging technologies.

This is particularly important for later-stage investment, where Europe's financing gap is most pronounced. The EU's analysis of AI financing points towards the need to strengthen Europe's capacity to finance large-scale AI ventures and mobilise additional sources of private and institutional capital⁶.

Strengthen the link between research and business

CEE's research capabilities should become a stronger source of investable companies, technologies and intellectual property. This requires more systematic cooperation between universities, research institutes, companies and investors. Technology transfer offices, joint research programmes, university spin-offs, industrial PhDs, shared laboratories and mechanisms for commercialising publicly funded research can help turn scientific capacity into economic value.

The objective should be to establish a continuous pipeline from research to prototype, from prototype to startup and from startup to scale-up.

Develop AI investment around CEE's industrial strengths

CEE should not attempt to replicate Silicon Valley or compete directly with the world's largest AI companies on their own terms. The region's competitive advantage lies in combining AI with its existing industrial capabilities. This includes manufacturing, automotive, robotics, cybersecurity, defence and dual-use technologies, energy, logistics, financial services and other sectors in which CEE already has substantial expertise and market depth.

Targeted investment in these areas could allow the region to develop specialised AI solutions with strong export potential while simultaneously accelerating AI adoption across the CEE economy.

Policy recommendations

- 1. Mobilise European, national and cross-border investment instruments.**
Align EU, national and regional funding programmes around common AI investment priorities and make it easier for companies to combine different sources of financing as they scale.
- 2. Support venture financing beyond early-stage startups.**
Expand access to Series A, B and later-stage financing through growth funds, guarantees, fund-of-funds structures and co-investment mechanisms, addressing the financing gap that emerges when CEE companies begin international expansion.
- 3. Build regional investment initiatives across CEE.**
Use existing regional cooperation frameworks, including the Three Seas Initiative, to develop cross-border investment programmes, connect national VC ecosystems and create a more integrated CEE AI market.

4. Stimulate private investment.

Encourage institutional investors, corporates and private capital providers to increase their exposure to AI through co-investment schemes, risk-sharing mechanisms, tax incentives and stronger links between established companies and technology startups.

5. Establish a dedicated CEE AI Fund based on public-private cooperation.

Create a regional fund capable of investing across the AI company lifecycle, with a particular focus on scale-ups and companies requiring larger growth rounds. Public capital should serve as a catalyst for private and institutional investment rather than as a substitute for it.

6. Create an effective business-academia partnership model.

Establish a scalable framework connecting universities, research institutions, startups, established companies and investors, with clear incentives for commercialisation, technology transfer and joint development of AI solutions.

CEE's AI opportunity will ultimately depend less on whether the region can produce promising startups than on whether it can retain and scale them. The region already has many of the ingredients required for a competitive AI ecosystem — talent, research capacity, industrial expertise and an increasingly dynamic startup base. The missing ingredient is scale.

Europe's wider investment challenge makes this particularly urgent. Global AI capital is increasingly concentrated in large transactions and a small number of markets. In 2025, US-based companies attracted USD 194 billion in AI VC, compared with USD 15,8 billion attracted by companies across the entire EU27⁵.

CEE cannot close this gap by relying on individual national ecosystems alone. The strategic objective should therefore be to turn CEE's fragmented investment landscape into a connected regional ecosystem: one in which European and national public funding attracts private capital, universities feed a stronger commercialisation pipeline, investors can finance companies throughout their growth cycle, and successful AI businesses can scale internationally without having to leave the region to find the capital they need.

For Romania's software and IT services industry, artificial intelligence is not a future opportunity but a present competitive necessity. The sector already contributes significantly to national GDP and exports, and AI adoption will determine whether CEE companies compete on value and innovation, or remain locked into cost-based outsourcing models.

Our members consistently raise the same concern: regulatory ambition in Brussels must be matched by implementation capacity on the ground. The AI Act sets a necessary framework, but for CEE markets compliance costs and legal uncertainty fall disproportionately hard. We therefore believe further work is needed to ensure that risk-based obligations remain genuinely proportionate for smaller players, not just in wording but in practice.

Regulation alone will not close the innovation gap between CEE and Western Europe. Our recent

research reports point to a structural investment and skills deficit as the primary bottleneck to AI-driven growth in the region, more so than the regulatory burden itself. Without targeted funding for scale-up capital, applied R&D, and digital upskilling, even a well-calibrated regulatory framework will not translate into adoption.

Our recommendation to EU and national policymakers is twofold: first, ensure AI Act implementation guidance and support tools (sandboxes, standards, SME helpdesks) reach CEE markets; second, treat investment in skills and applied innovation as equally urgent to regulatory clarity. One without the other will not deliver a globally competitive European AI industry.

ANIS remains committed to contributing the CEE industry perspective to this conversation, and we welcome the opportunity to be part of the policy dialogue going forward.

ANIS — Employers' Association
of the Software and Services
Industry



03.

AI Adoption in CEE

From experimentation to widespread adoption

Artificial intelligence is moving rapidly from experimentation towards becoming a core component of business operations. Across Europe, companies are increasingly using AI to analyse information, generate content, automate workflows and support decision-making. Yet adoption remains highly uneven between countries, sectors and, most importantly, between companies of different sizes.

In 2025, 20% of EU enterprises with at least 10 employees used AI technologies, up from 13,5% in 2024. However, the average conceals a substantial divide by company size: AI was used by 55% of large enterprises, 30,4% of medium-sized enterprises and only 17% of small enterprises. This means that the companies with fewer resources and often the greatest potential productivity gains remain the least likely to use AI¹⁰.

The gap is even more pronounced across Member States. In 2025, AI adoption reached 42% of enterprises in Denmark and 37,8% in Finland, while it stood at only 5,2% in Romania, 8,4% in Poland and 8,5% in Bulgaria¹⁰. The differences are particularly significant within CEE itself, demonstrating that there is no single regional adoption trajectory.

This matters because AI adoption is increasingly becoming a productivity and competitiveness issue rather than simply a question of technological sophistication. The European Commission's latest SME report identifies productivity growth as a central challenge for Europe's 34 million SMEs, while highlighting the adoption of new technologies and AI as one of the potential levers for improving SME performance¹¹.

At the same time, Europe's ability to deploy AI at scale depends on access to the underlying infrastructure. The European Union currently accounts for less than 5% of global AI computational capacity, compared with approximately 75% for the United States and 15% for China. The European Commission has therefore made computing infrastructure a strategic priority, including the development of AI Factories and plans for large-scale AI Gigafactories¹².

10 Eurostat, 20% of EU enterprises use AI technologies, access: <https://ec.europa.eu/eurostat/web/products-eurostat-news/w/ddn-20251211-2>

11 European Commission, Annual Report on European SMEs 2025/2026, access: https://single-market-economy.ec.europa.eu/publications/annual-report-european-smes-20252026_en

12 European Commission, A European Strategy for Artificial Intelligence in Science. Paving the way for the Resource for AI Science in Europe (RAISE), access: <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=celex%3A52025DC0724>

The EU is already building this infrastructure. As of August 2026, 19 AI Factories and 13 AI Factory Antennas are being established across Europe, with AI Factories specifically designed to connect computing power, data and talent with startups, SMEs, universities and industry. Several of these facilities are located in CEE, including projects in Poland, Czechia, Bulgaria, Romania, Slovenia and Lithuania.

The challenge for CEE is therefore twofold: ensuring that businesses have access to the infrastructure and technologies they need, while simultaneously building the organisational capabilities, skills and confidence required to use them effectively.

Key challenges

Technology alone is insufficient

Access to AI tools does not automatically translate into meaningful adoption. The real economic value of AI emerges when companies identify concrete use cases, redesign processes and integrate AI into everyday operations.

For many businesses, particularly SMEs, the first barrier is not the absence of technology but the difficulty of understanding where AI can create measurable value. Companies may experiment with generative AI tools without moving towards systematic implementation across customer service, production, logistics, finance, marketing, R&D or internal administration.

The distinction between experimentation and transformation is crucial. AI adoption should not be measured only by whether an employee has access to a chatbot or whether a company has purchased an AI-enabled product. The relevant question is whether AI is changing the way the organisation operates and generating measurable productivity, quality or competitiveness gains.

The European Commission's analysis confirms that company size is an important determinant of adoption, with large enterprises significantly more likely to use AI than SMEs. Larger companies are generally better positioned to absorb implementation costs, develop internal expertise and reorganise business processes around new technologies¹³.

For CEE, this creates a risk of a widening productivity gap between large companies and the region's much larger population of SMEs.

¹³ Eurostat, The use of artificial intelligence (AI) technologies in the European Union, access: <https://ec.europa.eu/eurostat/documents/7870049/23260410/KS-01-26-009-EN-N.pdf/37d063cb-28cf-3b4e-91f3-c3784c970842?i=1774528533658&version=1.1>

Skills and organisational readiness remain critical

AI adoption requires more than technical specialists. Employees across an organisation need sufficient understanding of AI to identify appropriate applications, use tools safely and critically, and incorporate them into their existing responsibilities.

This makes AI skills a workforce-wide issue rather than one limited to computer scientists. The European Commission estimates that 40% of EU citizens lacked basic or above-basic digital skills in 2025, despite 93% using the internet at least weekly¹⁴.

The skills challenge is particularly important because AI is changing existing jobs and workflows rather than simply creating a new category of "AI jobs". Companies need workers who can combine domain expertise with the ability to work effectively with AI systems.

This also changes the role of education policy. Primary and secondary education remain important, but they cannot address the immediate needs of an existing workforce. Lifelong learning, upskilling and reskilling therefore need to become a central component of AI adoption policy.

The European Commission's AI Continent Action Plan already envisages an AI Skills Academy aimed at upskilling and reskilling students and professionals, including through generative AI programmes, apprenticeships and other training schemes¹⁵.

SMEs face a disproportionate adoption gap

The gap between large enterprises and SMEs is one of the most important structural challenges for CEE.

Across the EU, only 17% of small enterprises used AI in 2025, compared with 55% of large enterprises. In countries such as Romania, Poland and Bulgaria, overall adoption remained below 10%¹⁰. In the case of CEE, SMEs account for a large share of economic activity and employment. If AI adoption remains concentrated among large corporations, a significant part of the regional economy risks missing the productivity gains associated with the technology.

SMEs often lack dedicated IT departments, data specialists or the financial capacity to experiment with multiple solutions. They therefore need practical support focused on business problems rather than technology for its own sake: identifying use cases, assessing potential returns, selecting appropriate tools, integrating them into workflows and training employees.

¹⁴ Eurostat, Digitalisation in Europe — 2026 edition, access: <https://ec.europa.eu/eurostat/web/interactive-publications/digitalisation-2026>

¹⁵ European Commission, AI talent, skills and literacy, access: <https://digital-strategy.ec.europa.eu/en/policies/ai-talent-skills-and-literacy>

Public awareness of AI opportunities remains limited

Awareness of AI is growing rapidly, but awareness of its practical economic applications remains less developed. Many businesses understand that AI is strategically important without knowing what that means for their own operations. This can result in either underinvestment or superficial experimentation — using AI for isolated tasks without considering how entire processes could be redesigned. There is a gap in understanding what AI can actually do for a particular business.

This is particularly important for SMEs, which often need examples, demonstrations and trusted intermediaries rather than abstract strategic guidance. European Digital Innovation Hubs, industry associations, universities and public support institutions can play an important role in translating AI capabilities into concrete business cases.

Access to computing capacity is becoming a strategic competitiveness factor

Computing capacity is becoming an increasingly important input into AI development and deployment.

The European Investment Bank estimates that the EU accounted for approximately 4% of existing global AI computing power in late 2025, compared with nearly 70% for the United States and 18% for China¹⁶. This gap affects frontier AI developers but affordable and accessible computing capacity is also important for companies, universities and public institutions that want to train, fine-tune, test or deploy AI systems.

For CEE, access is particularly important. Individual companies and national ecosystems may not have sufficient resources to build all necessary infrastructure independently. Regional and European infrastructure can therefore play a critical role in democratising access to compute.

The EU's AI Factories are an important step in this direction. The facilities are intended to provide access to AI-optimised supercomputing resources for startups, SMEs, researchers and industry. The next step is likely to be even more significant. The EU has also launched a call for tenders aiming to establish as many as seven AI Gigafactories across Europe. With industry-led funding backed by up to €10 billion in EU and national funding, the initiative is expected to unlock at least €20 billion in private investment across the Union. These large-scale facilities will be designed to provide massive computing capacity for training and deploying advanced AI systems.

¹⁶ European Investment Bank, Investment Report 2025/26 Capitalising on Europe's Strengths, access: <https://www.eib.org/files/publications/20250379-030326-investment-report-2025-chapter5-en.pdf>

What CEE needs

Move from AI experimentation to AI transformation

CEE needs to shift the focus from whether companies are "using AI" to whether they are transforming their operations through AI. Public support programmes should therefore prioritise practical implementation. SMEs should be helped to identify high-value use cases, redesign workflows, measure productivity gains and develop internal capabilities.

This means treating AI adoption as a process of organisational transformation rather than simply a technology procurement exercise.

The most valuable interventions will often be relatively practical: AI audits, implementation roadmaps, pilot projects, sector-specific demonstrations, access to experts and support with measuring return on investment.

Make SMEs the centre of AI adoption policy

The adoption gap between small and large companies means that a general "AI for business" strategy is unlikely to be sufficient. CEE countries should develop dedicated programmes for SMEs that combine advisory support, skills development, access to testing facilities and, where necessary, financial assistance for implementation.

Such programmes should be sector-specific where possible. A manufacturing SME, logistics company, accounting firm and agricultural business will have very different opportunities and constraints when adopting AI.

The objective should be to create a pipeline from awareness, to experimentation, implementation and finally scaling, rather than isolated grants for individual technologies.

Build an AI-ready workforce through lifelong learning

AI skills policy needs to move beyond the education of future generations and address the workforce that is already in employment. Governments, employers and education providers should create accessible programmes for upskilling and reskilling workers, with a strong focus on practical AI literacy.

Employees should learn how to operate AI tools, but also how to assess their outputs, identify risks, protect sensitive information and integrate AI into professional workflows.

This should be treated as part of economic policy rather than solely as an education policy. The speed of AI development means that skills will need to be continuously updated throughout people's working lives.

Build accessible computing infrastructure

AI infrastructure should become a shared economic resource rather than a capability available only to the largest companies. CEE should actively participate in European AI infrastructure programmes and ensure that regional companies, universities and research institutions can access the resulting capacity.

AI Factories provide a useful model because they combine compute, data, talent and support services rather than treating computing capacity as an isolated infrastructure project.

The region should also be involved in the development of AI Gigafactories. Their location, access conditions and links to national and regional ecosystems will influence whether the benefits of large-scale computing are concentrated in a few European hubs or distributed more widely across the continent.

Create conditions for safe experimentation

Businesses need environments in which they can test AI applications before committing to large-scale deployment.

Regulatory sandboxes can provide this environment by allowing companies to experiment with AI systems under supervision, obtain regulatory guidance and identify compliance issues at an early stage.

This is particularly valuable for SMEs, which may lack the legal and technical resources required to navigate complex regulatory requirements independently. The EU's AI regulatory framework is moving in this direction. The AI Omnibus that entered into force in July 2026 expanded access to regulatory sandboxes and introduced an EU-level sandbox, while also extending certain simplified requirements to small mid-cap companies.

CEE countries should make active use of these mechanisms rather than treating regulatory compliance solely as an administrative obligation.

Connect adoption with economic return

Public spending on AI should be evaluated by the economic value it generates.

This requires stronger cooperation between governments and business when designing AI programmes. Public support should focus on initiatives capable of generating measurable productivity, innovation, skills or competitiveness gains. It also means improving continuity between European and national funding. Promising projects should not lose momentum when an EU funding programme ends simply because national mechanisms are unable to take over.

A more effective approach would combine European programmes, national resources and private-sector participation into longer-term adoption pathways.

Avoid isolation while building European capacity

Building European AI capabilities does not require Europe to develop every element of the AI value chain independently. CEE economies in particular can benefit from international partnerships in research, skills, infrastructure, technology and deployment. Trusted partners from outside the EU can contribute to building European capabilities while providing local companies with access to technologies, expertise and markets.

The objective should therefore be resilience and choice rather than isolation. A competitive European AI ecosystem should have strong domestic capabilities while remaining connected to global innovation networks.

Policy recommendations

1. **Support AI adoption programmes for SMEs.**

Establish dedicated programmes helping SMEs identify practical AI use cases, assess return on investment, redesign processes and implement AI solutions. Support should combine advisory services, training, testing and, where appropriate, financial assistance.

2. **Expand lifelong learning and AI skills.**

Develop large-scale upskilling and reskilling programmes for the existing workforce, with a focus on practical AI literacy. Governments should work with employers, universities, vocational institutions and industry organisations to ensure training reflects real business needs.

3. **Invest in AI infrastructure and computing capacity.**

Ensure CEE companies, universities and research institutions have affordable access to AI compute through AI Factories, AI Gigafactories, data centres and other shared infrastructure. CEE countries should actively participate in the development and governance of European computing infrastructure.

4. **Promote public-private partnerships and regulatory sandboxes.**

Strengthen cooperation between governments, businesses, academia and civil society when designing AI adoption programmes. Expand the use of regulatory sandboxes and testing environments to allow companies — particularly SMEs — to experiment with AI safely and obtain practical regulatory guidance.

The goal should not be to maximise the number of companies that claim to "use AI". It should be to maximise the number of companies that use AI effectively to become more productive, innovative and competitive. For CEE, successful AI adoption will therefore depend on moving from experimentation to transformation — and from technological potential to measurable economic impact.

Europe's priority should be to create the conditions for AI innovation and adoption rather than introduce new regulatory complexity before businesses are ready to comply. We believe that the application of key obligations under the AI Act should be postponed where the necessary standards, guidance and implementation tools are not yet sufficiently developed. Companies, particularly SMEs, need legal certainty and adequate time to prepare, while regulators need to ensure that the framework is workable in practice.

For CEE, this is particularly important. The region has strong technological talent and significant potential to scale AI adoption, but it still faces gaps in investment, access to computing capacity and digitalisation. Europe should therefore focus on enabling companies to innovate and invest, expanding access to AI infrastructure and finance, and making regulatory sandboxes genuinely useful pathways to market. A pragmatic delay, combined with regulatory simplification and harmonised implementation across the Single Market, would help ensure that the AI Act supports rather than inadvertently slows Europe's AI competitiveness.



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04.

From rules
to results:
unlocking AI
growth in CEE

From regulatory ambition to AI deployment

Europe has chosen to regulate artificial intelligence through a comprehensive, risk-based framework designed to protect fundamental rights, safety and trust while creating a harmonised market for AI. The AI Act is intended to establish common rules across the European Union and, in principle, to allow companies to develop and deploy AI solutions across the Single Market under a common regulatory framework.

For Central and Eastern Europe, the practical question is whether this objective will be achieved in practice, rather than only in legislation.

The region has strong engineering talent, a growing technology sector and an increasingly important role in Europe's industrial and digital ecosystem. Yet companies in CEE, particularly SMEs and emerging technology firms, often have fewer resources to navigate complex compliance requirements than larger companies. A regulatory environment that is difficult to interpret, costly to comply with or different across Member States can therefore become a direct barrier to investment, innovation and adoption.

The CEE perspective is not that businesses oppose regulation. Rather, companies are concerned about uncertainty, disproportionate requirements and fragmented implementation. A stable and predictable regulatory environment was identified during the Brussels finale of #CEEAIChallenger roundtable series as one of major conditions needed for companies from the region to realise their technological potential, alongside access to finance and meaningful participation in the development of regulation.

Regulation can strengthen Europe's competitive position if it provides a predictable framework in which companies can innovate and scale. It can weaken that position if businesses face multiple interpretations of the same rules, overlapping compliance obligations or uncertainty over how requirements will be enforced.

The objective should therefore be to move from rules to results: from measuring regulatory ambition by the number of provisions adopted towards assessing whether the regulatory framework enables companies to develop, invest in and deploy AI.

The EU has already recognised the need for simplification. The Digital Omnibus on AI introduced changes intended to reduce implementation burdens and provide additional time and clarity for businesses and public authorities. At the same time, the broader debate around the Digital Omnibus has highlighted the difficulty of simplifying a digital rulebook that increasingly consists of interconnected layers of AI, data protection, cybersecurity and other digital legislation.

The CEE position should therefore be clear: Europe needs not less protection, but better regulation: simpler, more coherent, more predictable and more closely connected to actual risks.

Key challenges

Avoiding 27 different AI markets

The greatest strategic risk for European AI competitiveness is that a formally harmonised framework becomes fragmented through national implementation. The AI Act is intended to establish common rules across the EU. Yet differences in interpretation, enforcement practices, national institutional arrangements or additional national requirements could create substantially different compliance environments.

This concern was one of the clearest messages emerging from the CEE discussions. Businesses need to be able to innovate once and deploy across Europe, rather than redesign their compliance approach every time they enter a new Member State. For CEE, the issue is particularly important. The Single Market is one of the region's greatest potential advantages: companies can compensate for relatively small domestic markets by scaling across the EU. Regulatory fragmentation would directly undermine this opportunity.

The region therefore has a shared interest in preventing national gold-plating and unnecessary divergences in the implementation and enforcement of EU digital rules.

Businesses need certainty

The debate should not be reduced to the question of whether Europe has "too many regulations". Companies need rules that are clear, proportionate and predictable. Frequent changes, unclear interactions between different legal instruments and uncertainty about future requirements can be just as damaging as the volume of regulation itself. Lack of a stable and predictable regulatory framework is one of the major barriers facing companies from CEE.

Regulatory certainty also has a direct investment dimension. A company considering a new AI product needs to understand not only whether the product is permitted, but what compliance processes, documentation, data requirements, assessments and supervisory interactions will be required. If these costs cannot be estimated with reasonable confidence, investment decisions become more difficult.

Simplification must reduce complexity in practice

The European Commission's efforts to simplify the digital rulebook are therefore important. However, simplification should be assessed by its practical impact on companies, rather than by the number of provisions amended.

European policy-makers should be wary of unintentionally creating additional complexity, while working on initiatives intended to simplify the digital framework, especially if new requirements are added without sufficiently assessing how they interact with existing rules. This suggests a broader principle for European policymaking: regulatory simplification should be treated as an outcome, not a legislative exercise. Every new obligation should be assessed against the cumulative compliance burden already faced by businesses.

Regulatory fragmentation extends beyond the AI Act

Companies do not experience the AI Act in isolation. AI development and deployment increasingly intersects with GDPR, cybersecurity rules, data governance, consumer protection, sector-specific legislation and other digital requirements.

This makes regulatory coherence critical. An AI developer may have to consider several different legal regimes when using data, training models, assessing risks or deploying a system. This interaction is a particular area of concern. For SMEs, overlapping requirements can be particularly burdensome because they often lack dedicated legal and compliance teams.

The solution is not to remove safeguards, but to ensure that similar risks are assessed once, using compatible methodologies, rather than repeatedly under different pieces of legislation.

AI development needs clearer rules on data

Access to data is fundamental to AI development. Yet uncertainty around data protection can make the use of data for AI training and development more difficult. The proposed Digital Omnibus sought to provide greater legal certainty by explicitly addressing the possibility of using legitimate interest as a legal basis for AI development, but the difficulty of maintaining this clarification through the legislative process appears to still be a valid concern.

From the perspective of AI developers, relying only on guidance or interpretations that may evolve over time does not provide the same degree of certainty as a clear and harmonised legal framework. CEE therefore has a strong interest in an EU-wide approach that enables responsible use of data for AI while maintaining appropriate safeguards.

AI training needs legal certainty

Copyright rules are another critical part of the data-access framework for AI. Article 4 of the Copyright in the Digital Single Market Directive provides a text and data mining (TDM) exception for reproductions and extractions of lawfully accessible works, unless rightholders expressly reserve their rights in an appropriate manner, including through machine-readable means for online content. A separate exception in Article 3 of the same Directive covers text and data mining for scientific research by research organisations and cultural heritage institutions and is not subject to a rights reservation. This distinction is particularly relevant for CEE, where universities and public research institutes form an important part of the region's AI capacity. The AI Act builds on that framework by requiring general-purpose AI model providers to put in place a policy to comply with EU copyright law and to identify and respect such rights reservations.

For CEE, preserving a workable TDM framework is particularly important. Training and improving AI systems requires analysis of data at scale, including material in smaller European languages and reflecting local economic and cultural contexts. Legal uncertainty, divergent national interpretations or technically fragmented opt-out mechanisms would raise compliance costs and could reduce the availability and quality of CEE-language models and services. EU implementation should therefore preserve effective TDM pathways, respect rightholders' opt-outs and converge on clear, interoperable machine-readable protocols. Voluntary commercial arrangements for particular datasets or forms of access can develop alongside, rather than replace, the TDM framework.

Sensitive data requires a risk-based approach

The interaction between AI and special categories of personal data creates another challenge. AI systems can potentially infer sensitive characteristics from datasets even when such characteristics are not explicitly present in the original data. The Brussels discussion highlighted concerns that overly broad interpretations of sensitive data could make ordinary AI development and training disproportionately difficult. A particularly important principle is therefore risk-based regulation.

Where technical and organisational safeguards can effectively mitigate risks, regulation should allow responsible experimentation and development rather than relying on blanket restrictions. The objective should be to protect individuals while ensuring that legitimate technological development remains possible.

Compliance requirements should be proportionate

The same principle applies to impact assessments and other compliance mechanisms. Concerns about divergent national approaches to DPIAs and other GDPR procedures include situations where similar requirements can result in substantially different levels of administrative burden between Member States. This is precisely the kind of fragmentation that undermines the Single Market. The EU should therefore pursue greater harmonisation of compliance methodologies, particularly where the underlying risks are similar.

The regulatory process itself needs improvement

A broad discussion regarding regulating AI in Europe raises an overarching issue: how European digital legislation is developed. Major changes to the digital rulebook should always be supported by sufficiently robust impact assessments. Evidence-based assessment should precede major legislative changes, particularly where the objective is simplification.

Regulatory stability is itself an economic asset. Businesses need to know that once a framework has been established, it will not be repeatedly reopened without a clear evidence-based justification.

What CEE needs

Build one European AI market in practice

The first priority should be to make harmonisation work in practice. Companies should be able to develop an AI solution in one Member State and deploy it throughout the EU without facing fundamentally different compliance regimes. This can be achieved through consistent interpretation, compatible implementation practices, coordinated enforcement, common standards and effective cooperation between national authorities.

Make simplification evidence-based

Simplification should be based on evidence of how rules affect businesses in practice. The EU should systematically identify overlapping obligations, duplicated assessments and conflicting requirements across the digital acquis. Impact assessments and "digital fitness checks" should be used not only when introducing new legislation, but also when modifying existing frameworks. This is particularly important for CEE SMEs, for which compliance costs can represent a much larger share of the resources available for innovation.

Prevent national gold-plating

Member States should avoid adding unnecessary national requirements to harmonised European legislation. Where national measures are genuinely necessary, they should be transparent, proportionate and based on clearly identified national circumstances.

CEE countries have a common interest in this approach because national divergence can quickly undermine the regional market and reduce the ability of companies to scale.

Strengthen regulatory coordination across CEE

CEE countries should exchange implementation experience and coordinate their positions on emerging EU digital legislation. The region does not need identical national AI policies. It does, however, need greater alignment on the principles that determine the competitiveness of its companies. Such cooperation would allow CEE to move from being primarily a recipient of European digital regulation towards becoming a more influential contributor to its development.

Make dialogue with industry a permanent part of policymaking

Companies affected by regulation should be meaningfully involved in its development. This should go beyond traditional public consultations. Regular structured dialogue between regulators, industry, researchers and civil society can help identify unintended consequences, technological developments and implementation problems earlier.

For CEE, such dialogue is particularly important because local SMEs and emerging technology companies may otherwise be underrepresented in European policymaking.

Use sandboxes as regulatory infrastructure

Regulatory sandboxes should be developed as permanent innovation infrastructure. They should allow companies to test AI applications, receive regulatory guidance, experiment with compliance mechanisms and prepare for deployment.

Policy recommendations

1. **Simplify and streamline the AI acquis.**

Conduct systematic reviews of overlapping AI, data protection, cybersecurity and digital obligations. Measure simplification by reductions in compliance costs, duplicated assessments and administrative procedures rather than by the number of legislative provisions amended.

2. **Prevent national gold-plating.**

Ensure that harmonised EU AI rules are implemented consistently across Member States and do not generate unnecessary national requirements or divergent interpretations.

3. **Strengthen regulatory coordination across Member States.**

Increase cooperation between national AI authorities and establish mechanisms for sharing implementation experience, aligning interpretations and identifying emerging regulatory divergence.

4. **Increase structured dialogue between regulators and industry.**

Create permanent channels for dialogue between regulators, businesses, researchers and other stakeholders. Companies should be involved early enough to identify practical consequences before new requirements are finalised.

5. **Establish a coordinated CEE AI policy approach.**

CEE governments should coordinate positions on the regulatory issues where the region has shared interests, particularly simplification, proportionality, harmonisation, SME competitiveness, data access, infrastructure and AI adoption.

6. **Expand regulatory sandboxes.**

Make AI regulatory sandboxes fully operational and accessible to SMEs and emerging technology companies. Connect national sandboxes and develop common approaches so that experience gained in one Member State can be reused across the EU.

7. **Strengthen evidence-based policymaking.**

Require robust impact assessments and cumulative regulatory-burden assessments before introducing or significantly modifying digital legislation. Simplification initiatives should themselves be subject to evidence-based assessment.

8. **Harmonise the AI-GDPR interface.**

Provide greater EU-level legal certainty around AI training, legitimate interest, sensitive data, privacy-enhancing technologies and DPIAs. Avoid divergent national interpretations that undermine the Single Market.

9. Establish predictable regulatory implementation timelines.

The European Commission and national authorities should provide businesses with clear forward-looking timelines for guidance, standards, implementing measures and compliance deadlines. Companies should have sufficient time to adapt after the practical requirements become clear.

10. Focus regulation on enabling deployment.

The ultimate test of AI regulation should be whether it enables responsible deployment at scale while protecting fundamental rights and safety. Regulation should be designed to determine what companies cannot do, but also to provide clear pathways for what they can do.

Europe's regulatory model can become a competitive advantage but only if it produces certainty rather than complexity, harmonisation rather than fragmentation, and innovation pathways rather than compliance dead ends.

For CEE, this is particularly important. The region's companies need the Single Market precisely because it allows them to overcome the limitations of relatively small domestic markets. If regulatory divergence effectively recreates national barriers, one of Europe's greatest economic advantages becomes weaker. The CEE perspective is therefore not a call for deregulation for its own sake. It is a call for smarter regulation.

ABOUT CEE DIGITAL COALITION

CEE Digital Coalition is a gathering of digital and advanced technologies industry organisations from Central Eastern Europe, bringing the region together on its digital path. Members of the coalition work together to boost the digital transformation of the region's economy and informational society. They strive to promote close business and policy-making cooperation between the countries of CEE in the field of digital. Associated organisations declare their will to support governments, as well as European decision makers and businesses in developing an environment for rapid and safe digital development in Europe, aligned with the best interest of their region.

ABOUT THE #CEEAIChALLENGER 2026

#CEEAIChallenger 2026 was a regional initiative dedicated to the development of artificial intelligence in Central and Eastern Europe. The project consisted of a series of expert debates organized by the CEE Digital Coalition together with regional member organisations and partners: AISlovakia, Association for Applied Research in IT, Business & Science Poland and Employers' Association of the Software and Services Industry.

The series aimed to build a common CEE voice in the debate on the future of AI in Europe. The discussions held in Bratislava, Bucharest, Prague and in Brussels addressed topics of AI investment, technology adoption by businesses, digital skills and the future of work, as well as regulations and legal frameworks supporting innovation.



