SHAKERS



# 2026 State of European *AI Builders*

Who builds Europe's AI, how they work,
and where the value goes.

SHAKERS

**State of European AI Builders 2026**

First annual edition. Published by Shakers, September 2026.

Survey of 1,035 technology professionals with 3+ years of experience, fielded August 2026 across 23 European countries.

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# The people your org chart *cannot explain*

Two years ago, everyone was asking the same question: will AI replace us?

Nobody asks that anymore. The people we work with every day stopped debating and started building. They orchestrate agents before breakfast. They ship in a week what used to take a quarter. And when we looked for data about them, about how they work, what they earn, what they need, we found almost nothing. Plenty of reports about AI budgets. None about the humans turning those budgets into working software.

So we measured it ourselves.

This report is the first annual portrait of Europe's AI Builders: the professionals who combine deep expertise with AI to multiply what they can build. We surveyed 1,035 of them across 23 European countries, independents and employees side by side, and we asked the questions nobody had asked. Not "do you use AI" but "who keeps the value it creates".

Some answers made us optimistic. Some should worry every CEO in Europe. All of them point the same way: the work has already changed. The way we organize it has not caught up.

That gap is where the next few years of European tech will be decided. This report is our contribution to closing it.



**Hector Mata**
CEO & CO-FOUNDER, SHAKERS

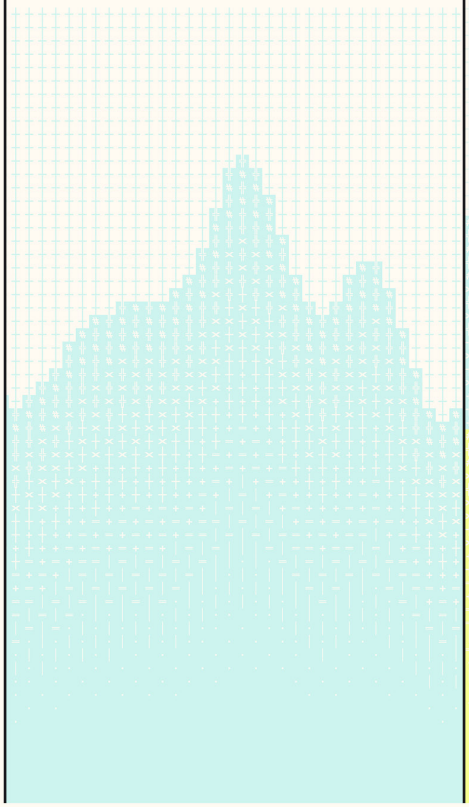
# 02. The study in 10 key stats

# The study in *10 key stats*

## 63%

### The Builders ship

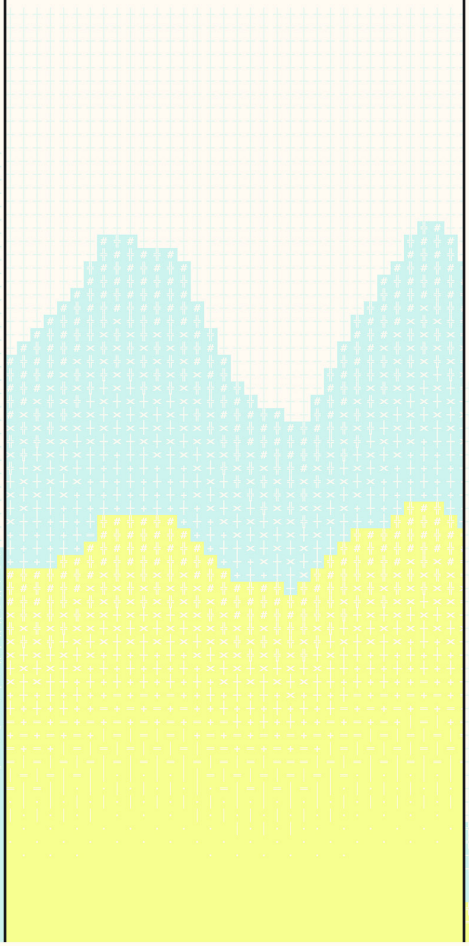
Practitioners got at least half of their AI projects into real production, debunking the narrative that says that "95% of AI initiatives fail".



## 68% vs 43%

### The value AI creates has an owner

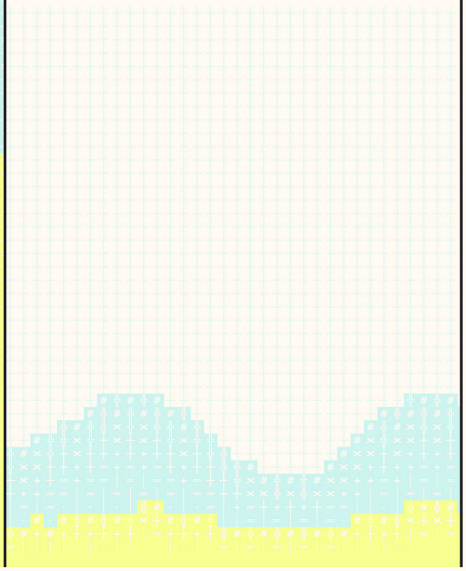
Independents keep the time and value AI frees up. Employees mostly hand it back to their employers.



## 25% vs 9%

### The repricing has started

When pay moved, the rates from independent Builders grew almost three times faster than salaries.



# The study in *10 key stats*



**65%**

**The unpaid gains**

Two thirds of employees got zero pay recognition for their increased productivity with AI.



**1 in 4**

**The AI closet**

A quarter of Europe's tech professionals don't tell their employers how much of their work is AI.



**6%**

**The AI penalty is a myth**

Only 6% were ever paid less or questioned after disclosing AI use. The fear doesn't match the reality.



**73%**

**Agents are infrastructure**

Nearly 3 in 4 keep at least one AI agent or automated workflow running in real work.



**68** vs 54

**The Autonomy Index**

When it comes to deciding how AI is used and which tools. Independents score 14 points higher in autonomy.



**24%**

**The quiet exodus**

Nearly 1 in 4 employees is seriously considering going independent within 24 months. They are the heaviest AI users.



**67%**

**Europe, by choice**

Two thirds are building their AI careers in Europe because they want to. And 64% now call EU regulation a professional advantage.

# 03. How we built this study

# How we built *this study*

Fieldwork ran through August 2026. We surveyed technology professionals with at least three years of experience, in technical roles across software, AI and ML, data, DevOps, product and design.

1,035 valid responses passed our quality controls, combining two sources: an independent research panel and certified senior independent specialists from the Shakers community. All figures pool both sources; the split is documented and available on request.

The sample: 229 independents, 676 full-time employees and 130 employees who also work independently, across 23 European countries. Country of residence was verified against panel demographic data.

> One definition matters more than the rest. We call a project "in production" only if it is used by real users or systems and still running 90 days after deployment. Not a demo. Not a pilot. Working software.

| | |
|---|---|
| United Kingdom | 400 |
| Spain | 146 |
| Germany | 73 |
| Italy | 70 |
| Poland | 67 |
| Portugal | 51 |
| France | 51 |
| Netherlands | 48 |
| Ireland | 30 |
| 14 more countries | 99 |
| Total valid responses | 1,035 |

# 04. The AI Builder's toolbox

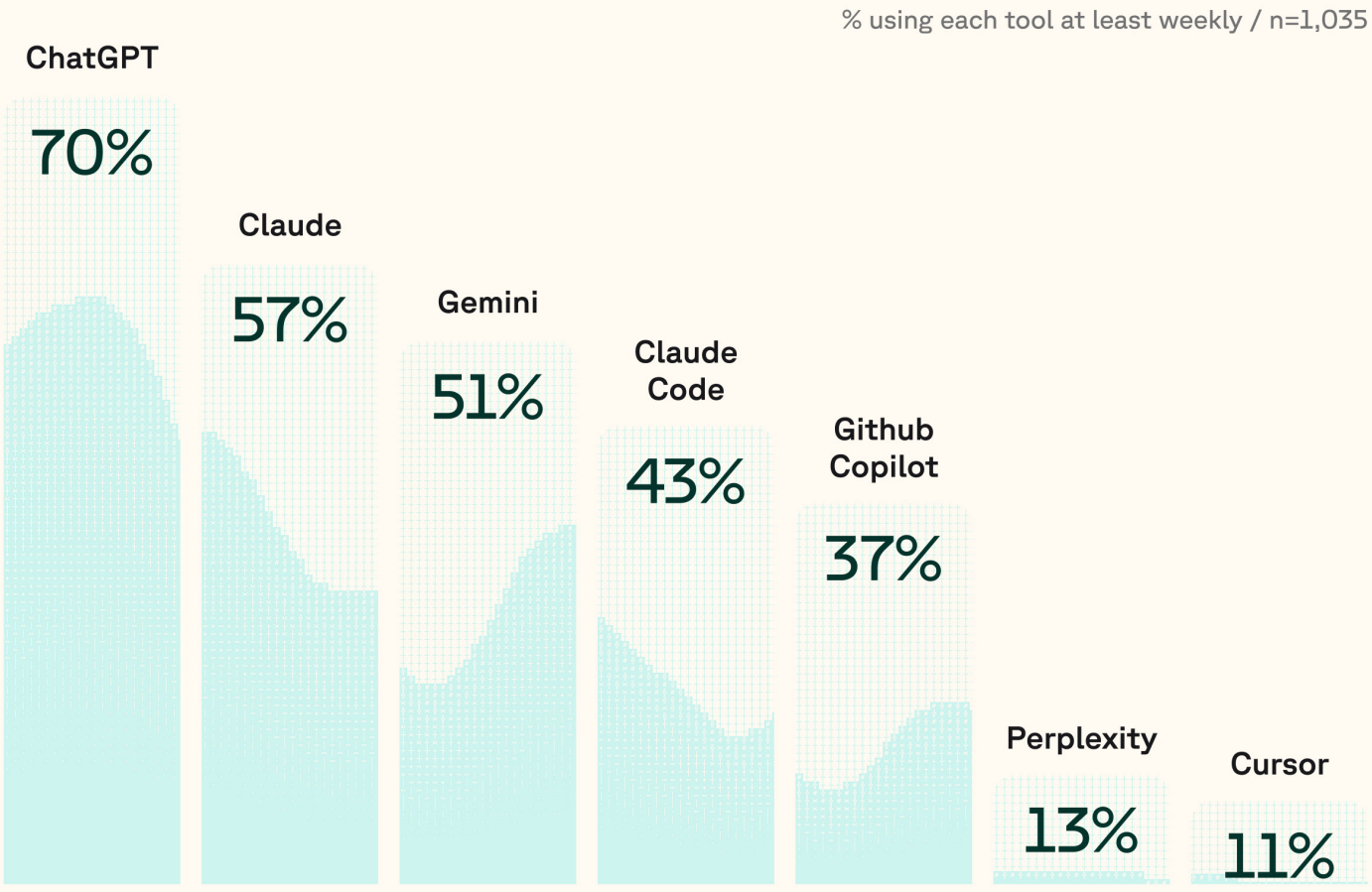
Chapter 01

# The AI Builder's toolbox

Forget the org chart. The people getting AI into production in Europe are software engineers, data specialists, ML engineers and product leads with years of shipped work behind them. Some employed, some independent. What they share is not a job title. It's a way of working.

### The toolbox is not what LinkedIn thinks it is

ChatGPT leads, but the real story is how fast AI coding tools became normal. This is not experimentation any more. This is the new workbench.



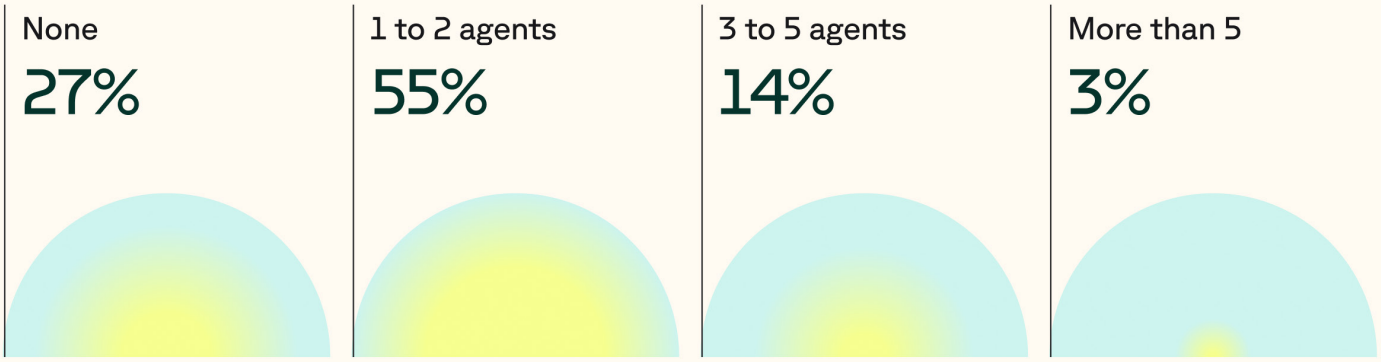


*"With the help of AI, as a solo developer, I am able to complete projects in a week that, as a lead developer leading a team, used to take months."*

Independent talent, Spain

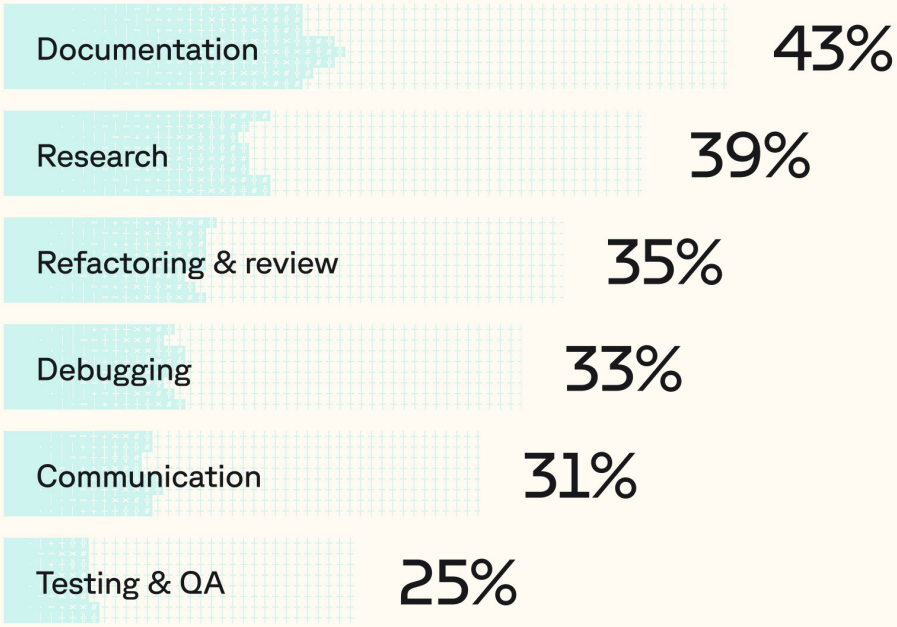
### Agents stopped being a demo

73% keep at least one AI agent or automated workflow running in real work. Not in a sandbox. In projects with clients and deadlines. And 17% run three or more at once.




### What they delegate to agents tells you what changes next

Tasks most delegated to AI, up to 3 choices / % of respondents



# 05. From pilot to production

Chapter 02

# From pilot *to production*

You have read the headline a hundred times: 95% of enterprise AI pilots fail. But when we asked the people who actually build, the failure story collapses.

~~95% fail~~

The enterprise pilot narrative. Committees, POCs, slideware.

## 63% ship

Practitioners who got at least half of their AI projects into real production. 35% shipped most or all.

The difference is not the model. It is who does the work and how much room they have to do it. Production, in this study, has a hard definition: software used by real users or systems, still running 90 days later. No demos. No slideware.

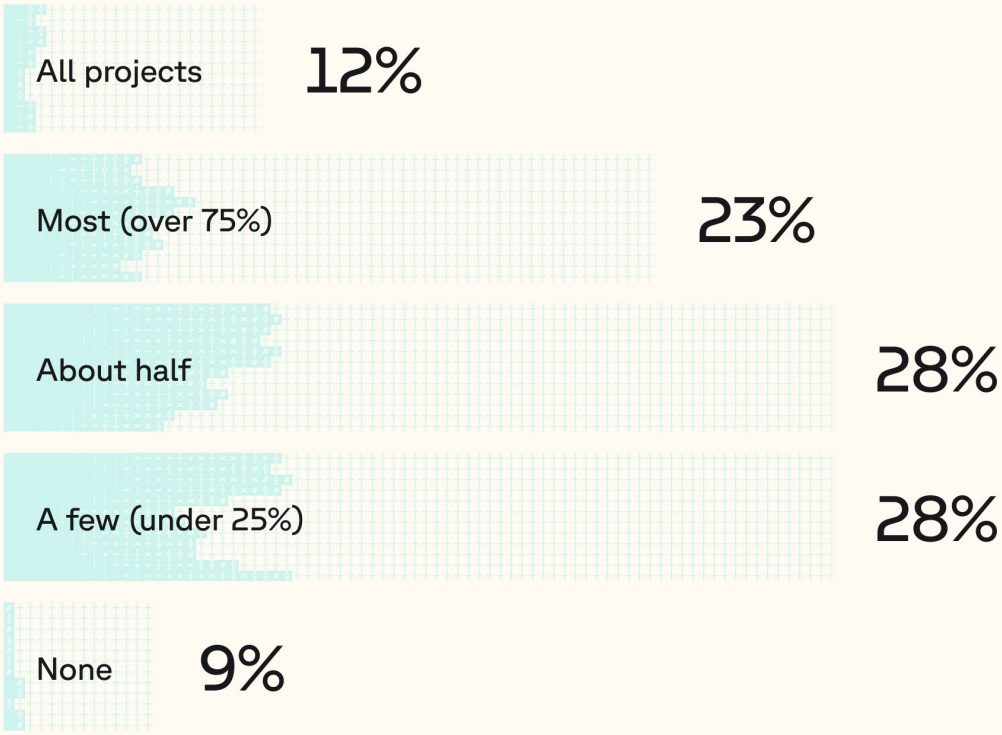


*"My work is AI; I develop and quality control it. If there is no AI, there is no work."*

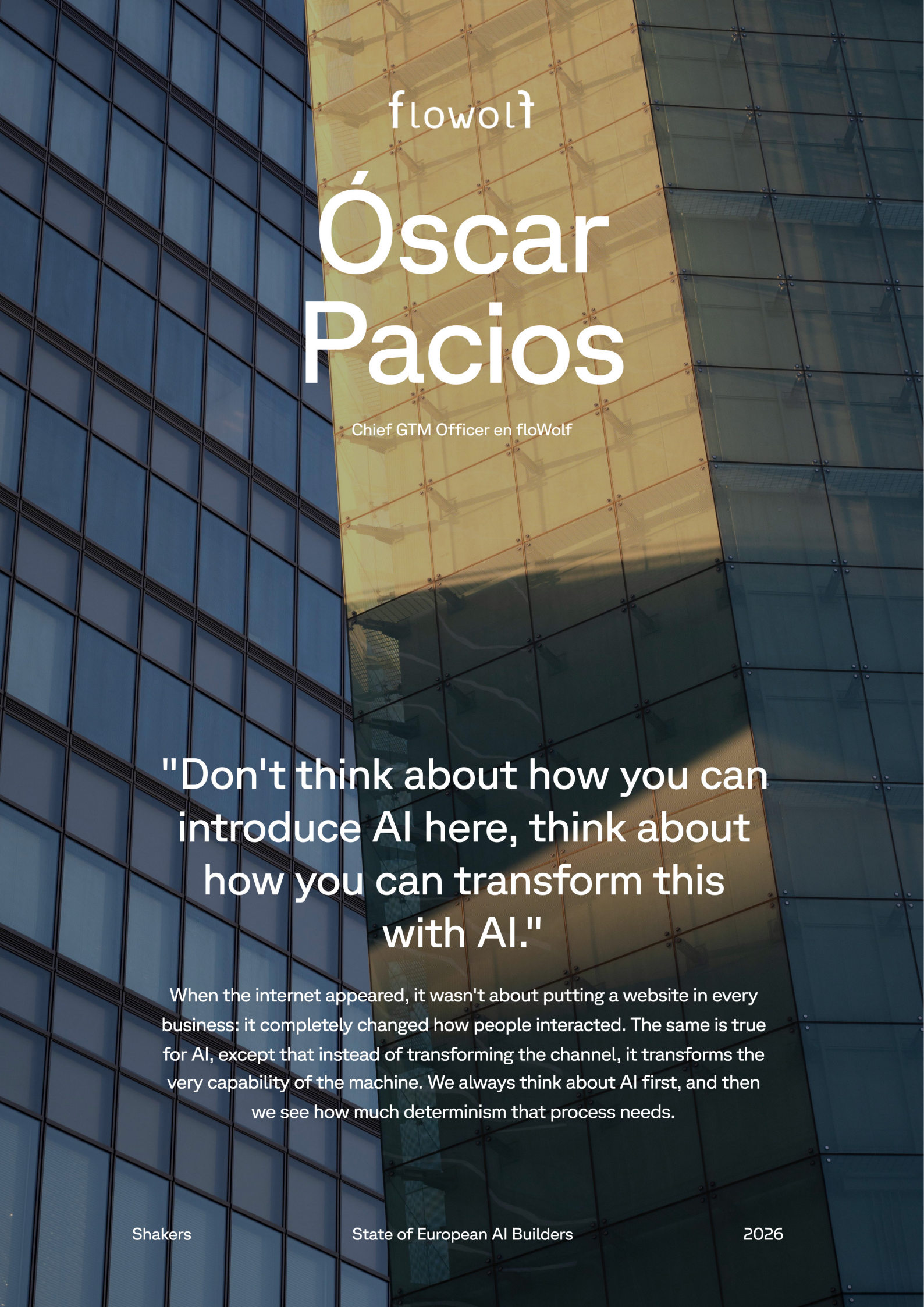
Independent talent, Germany

**How much of their AI work made it**

Base: 878 respondents who worked on AI projects in the last 12 months




Europe does not have an AI capability problem. When practitioners describe what blocks them, in their own words, they talk about organisation: unclear owners, shifting scope, time eaten by everything except building. The technology is the part that works.



floWolf

# Óscar Pacios

Chief GTM Officer en floWolf

## "Don't think about how you can introduce AI here, think about how you can transform this with AI."

When the internet appeared, it wasn't about putting a website in every business: it completely changed how people interacted. The same is true for AI, except that instead of transforming the channel, it transforms the very capability of the machine. We always think about AI first, and then we see how much determinism that process needs.

## Expert Voices

Oscar Pacios Rodríguez is the Chief Go-To-Market Officer at floWolf, where he leads the commercial strategy of an AI-native consultancy, from technological partnerships with Anthropic and OpenAI to transformation projects using AI across various sectors.



Óscar Pacios
Chief GTM Officer @floWolf

### Who we are and why we don't have "AI initiatives"

FlowWolf was founded a couple of years ago with one goal: to be a reference player in technology consulting to apply the revolution of artificial intelligence in companies, bringing together three elements: the talent and culture of each company, the vertical knowledge of their industry, and everything that AI can contribute to that specific business. To achieve this, we establish partnerships with the technologies we consider leaders, invest in internal training, and stay very up-to-date on where each platform is heading. We work with Anthropic and OpenAI, as well as companies that have been in software for much longer but are definitively betting on AI, such as Appian, Adobe, or Salesforce.

***"We do not have 'AI initiatives' as a separate category: all the projects we undertake include AI in some form"***

When you ask us how many AI initiatives we have launched in the last 18 months and how many are in production, the honest answer is that this question does not fit with how we work. We do not have 'AI initiatives' as a separate category: all the projects we undertake include AI in one way or another, either because we develop them with AI accelerators, or because we incorporate AI capabilities as a differentiator, or both.

### Every project is already an AI project

We believe that AI is not about implementing a specific use case, such as "how do I speed up billing" or "how do I improve these reports." It is a transformative technology, just like the internet was. When the internet appeared, it was not about putting a website in every business, but it completely changed how people interacted. We think the same applies to AI, except that instead of transforming the channel, it transforms the machine's capability itself and the relationship between the user and the machine. Therefore, in every project we propose to a client, the question is not "how can you introduce AI here" but "how can you transform this with AI." We call this thinking AI-first: we first propose the solution with AI, and then we decide how much determinism that specific process needs.

### What really hinders adoption, and it's not the budget.

We have had projects that did not meet initial expectations, but not due to a cost issue. Developing with AI is not expensive: it increasingly reduces costs, time, and effort compared to the previous human process. It has a different maintenance cost, that of tokens, but it is much more efficient than the time we previously spent as people. Clients do not see it as expensive either.

The real problem is that many organizations are not ready to genuinely adopt an AI transformation. Companies know they have to adopt it, because otherwise the competition will overtake them, but deep down they are seeing how long they can hold out doing things as they have before before having to embrace deeper organizational changes. That's why many apply AI to very specific and surface-level tasks: they do not want to face the more real implications that a complete transformation would have on their organization. It is a cultural issue and about internal readiness, not about budget or misplaced priorities.

### How we use external talent, and what we seek in it.

At floWolf, around 30% of our talent is external, and part of it comes from Shakers. Many are working on AI projects. We have not yet hired "specialized AI consultants" as a separate role, but our external collaborators do work with AI regularly.

We care less about the specific tool they have used before, as long as they have gone through the experience of real agentic development: encountering errors, learning to specify what they need clearly, and following a clear methodology when delegating to an agent.

***"AI makes the work more efficient, but you still need that person to have a clear understanding of the software architecture they want to build."***

### Our model: between 20% and 30% external talent, structurally

In terms of our technological delivery, we expect to maintain a ratio of between 20% and 30% external collaboration. It is a structural decision of our company model, for speed, agility, and risk control, not something we are changing looking towards 2027.

### European regulation: change the data, not the team

The AI Act and GDPR mostly affect how we handle data and where agents operate, not talent management itself. We already had confidentiality agreements in place, so no major change there. European data sovereignty will matter more, but shouldn't limit who you hire within Europe. We use European talent for Europe and American talent for the US mainly for time zone alignment, not regulation.

# 06. The AI dividend

Chapter 03

# The *AI dividend*

AI frees up time. That time has to go somewhere. Where it goes is the most important economic question in European tech right now, and the answer depends on one thing: your working model.

**Independents**

**68%** keep it

| | |
|---|---|
| Shorter workdays, more free time | 39% |
| More clients or side projects | 24% |
| A higher rate they priced in | 5% |
| Client captures it | 25% |
| Lost to meetings and admin | 7% |

**Employees**

**43%** keep it

| | |
|---|---|
| Shorter workdays, more free time | 30% |
| Side projects | 11% |
| A raise they negotiated | 3% |
| Employer absorbs it as more work | 36% |
| Lost to meetings and admin | 21% |

Same tools. Same gains. Opposite outcomes.




*“I can do more and actually do more, but that increase in productivity doesn't reflect on my salary.”*

Employee, Spain

### The repricing has started, quietly

Among professionals whose pay moved in the last 12 months, independent rates rose a mean 25% (median 20%). Salaries rose 9% (median 5%). Ask what drove the increase and the gap explains itself: 25% of independents point at their AI skills. Among employees, 10%. Salaries still reward seniority. Rates already reward capability.

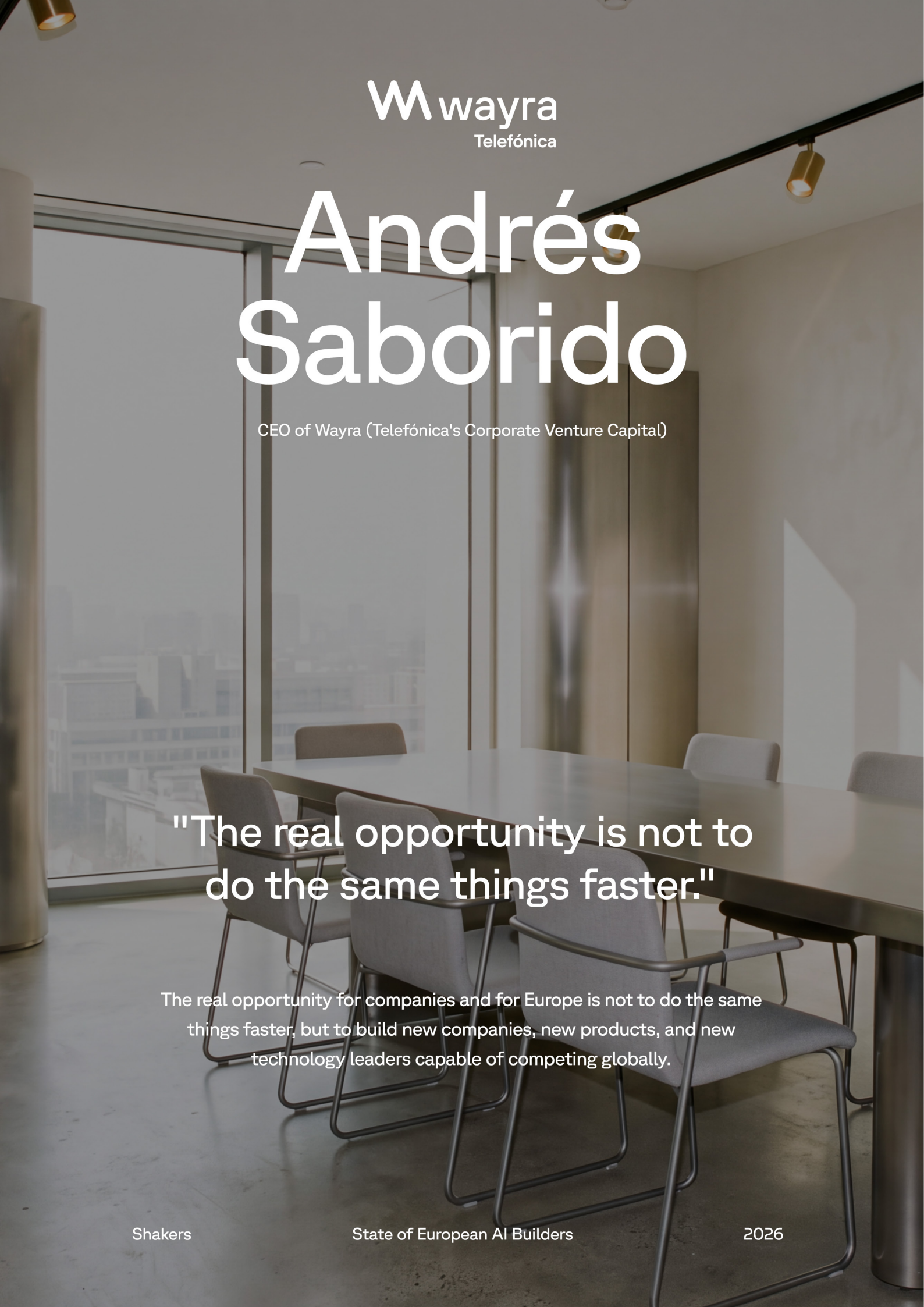
Mean pay increase among those whose pay rose | bases: 68 independents, 362 employees

| | |
|---|---|
| Independent rates | 25% |
| Employee salaries | 9% |

## 65%

### And the gains that nobody pays for

Half of Europe's tech workforce reports output gains above 25%. Yet 65% of employees saw zero salary recognition. That is not a talent problem or a technology problem. It is a market inefficiency, and markets do not stay inefficient forever.



wayra
Telefónica

# Andrés Saborido

CEO of Wayra (Telefónica's Corporate Venture Capital)

## "The real opportunity is not to do the same things faster."

The real opportunity for companies and for Europe is not to do the same things faster, but to build new companies, new products, and new technology leaders capable of competing globally.

## Expert Voices

Andrés Saborido Scafati is the CEO of Wayra, Telefónica's open innovation fund, where he applies AI across the entire venture capital value chain, from startup sourcing to portfolio management.



Andrés Saborido
CEO @Wayra

### The size of the team hasn't changed; the profile has changed.

Today we need fewer people dedicated to gathering information and more people capable of interpreting it. The venture capital professional is evolving towards a more strategic profile, with the ability to combine business acumen, technology, and data analysis. AI multiplies the productivity of the team. I don't believe it will replace investors, but it will enable an excellent team to manage a much larger portfolio than five years ago.

### How we build our teams

Wayra was born as an open innovation platform, so collaborating with talent both inside and outside the organisation has been part of our model from the beginning. Our teams combine professionals from Wayra and Telefónica, external specialists we bring in for specific needs, and entrepreneurs from the companies we invest in.

The result is smaller, more flexible teams, with a very strong internal core, both in business knowledge and technical capabilities, complemented by external specialists.

### How I envision the corporate team of 2027

For fifteen years, I have been advocating for more open working models, and artificial intelligence is accelerating that trend. I envision smaller, highly expert teams that are deeply knowledgeable about the business and its data, supported by external specialists who join flexibly based on each need. In this model, founders also contribute talent and specialized knowledge. They have a deep understanding of a problem, a technology, and a market. Organizations will increasingly be open to integrating that external talent within the same team, regardless of where it comes from.

# 07. The AI shame

Chapter 04

# The *AI shame*

One in four European tech professionals does not tell the people paying them how much of their work involves AI. Some are never asked and never say. Some actively avoid the subject.

| | |
|---|---|
| 25% | Keep it quiet. They don't disclose how much of their work runs on AI. |
| 14% | Would go underground. If AI were banned tomorrow, they would keep using it in secret. Another 39% would comply and let the quality drop. |
| 6% | Ever paid the price. Only 6% were paid less, questioned on hours or reduced in scope after AI came up. The fear is inherited from a market that no longer exists. |
| 37% | The flip has happened. 37% say disclosing their AI use increases their perceived value. More than double the 14% who still fear it cuts the other way. Working openly with AI stopped being a confession. It became a credential. |

The closet is emptying. What the market needs now is not suspicion. It is a standard for proving how you work with AI, so nobody has to take anyone's word for it.



*"I write code faster now, but I reinvest the time I save in designing the processes, analysing the data and governing the solutions. Generated code still has to be guided and validated."*

Independent talent, Italy

# Advancing towards responsible technology governance also ends up being a competitive advantage for companies

This report captures very well one dimension of AI and other technologies that we are seeing at Adigital: advancing towards responsible technology governance also ends up being a competitive advantage for companies. This, of course, has an impact on talent. We are starting to see teams that approach governance not as a layer added at the end of the process for compliance reasons, but as part of the design and implementation process. That is where intention is given to the principles of transparency, explainability or privacy. And this is key, because companies go from having the technology to having people capable of identifying where and how to apply it.



Justo Hidalgo Senior Director of Technologies and Governance, Adigital

adigital

# 08. The new shape of work

Chapter 05

# The new *shape of work*

### Your job title is lying to you

54% of Europe's tech professionals say their official title no longer fully describes what they do. Half of the workforce now spends most of its time directing AI and framing problems, not producing deliverables by hand (32%). The work changed. The vocabulary is still catching up.

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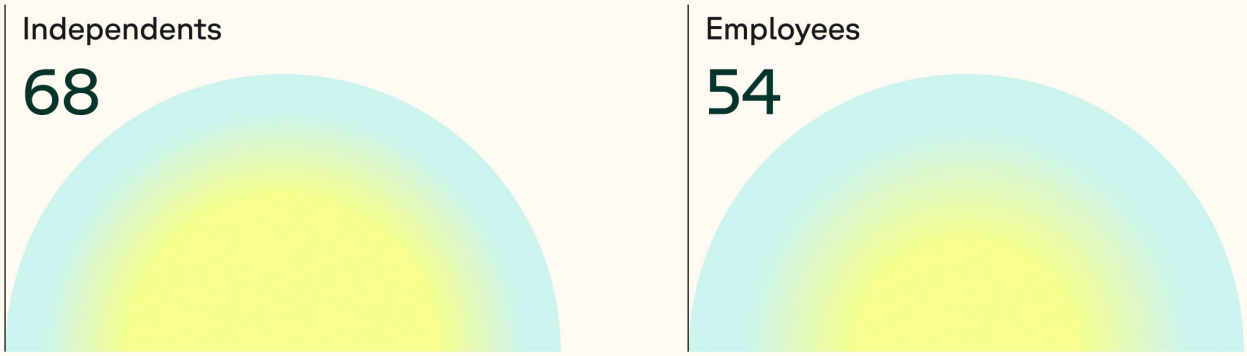
*"AI has come along, taken coding away from me, and replaced it with supervising and managing non human people."*

**Employee, Spain**

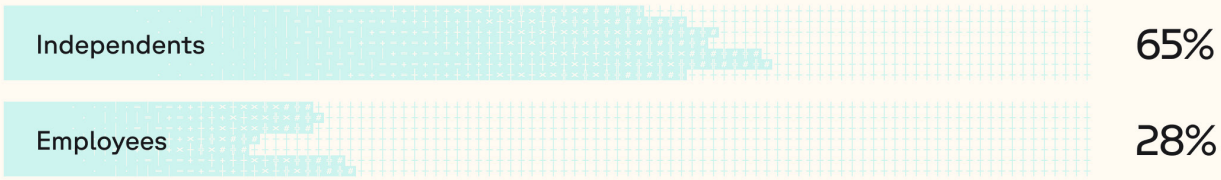
### The Autonomy Index: 68 vs 54

We asked who has the final say over four things: the projects you take on, the tools you use, when you work and how the work gets done. Scored 0 to 100, independents land at 68, employees at 54. Fourteen points is the measurable price of the org chart.

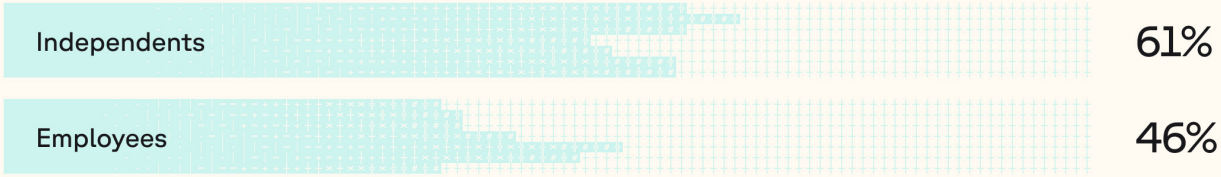
% answering "I have the final say" / independents vs employees




**I decide when and where I work**




**I decide my tools and AI**




**24%**

of employees are seriously considering going independent within 24 months



And they are not the ones falling behind. They report the highest output gains (61% above +25%, against 39% of those staying) and twice the orchestration intensity. Europe's companies are not losing their laggards. They are losing their AI Builders.

The number one skill everyone plans to learn next says where this goes: AI agent orchestration (44%), ahead of governance and compliance (34%). Directing AI is becoming the job.

# Providing the right regulatory framework to attract and deploy more tech professionals is not only essential, but critical.

"As the AI transformation accelerates and with startups at the forefront of it, this report highlights an urgent need. If Europe is to have a world-class innovation ecosystem, providing the right regulatory framework to attract and deploy more tech professionals is not only essential, but critical."

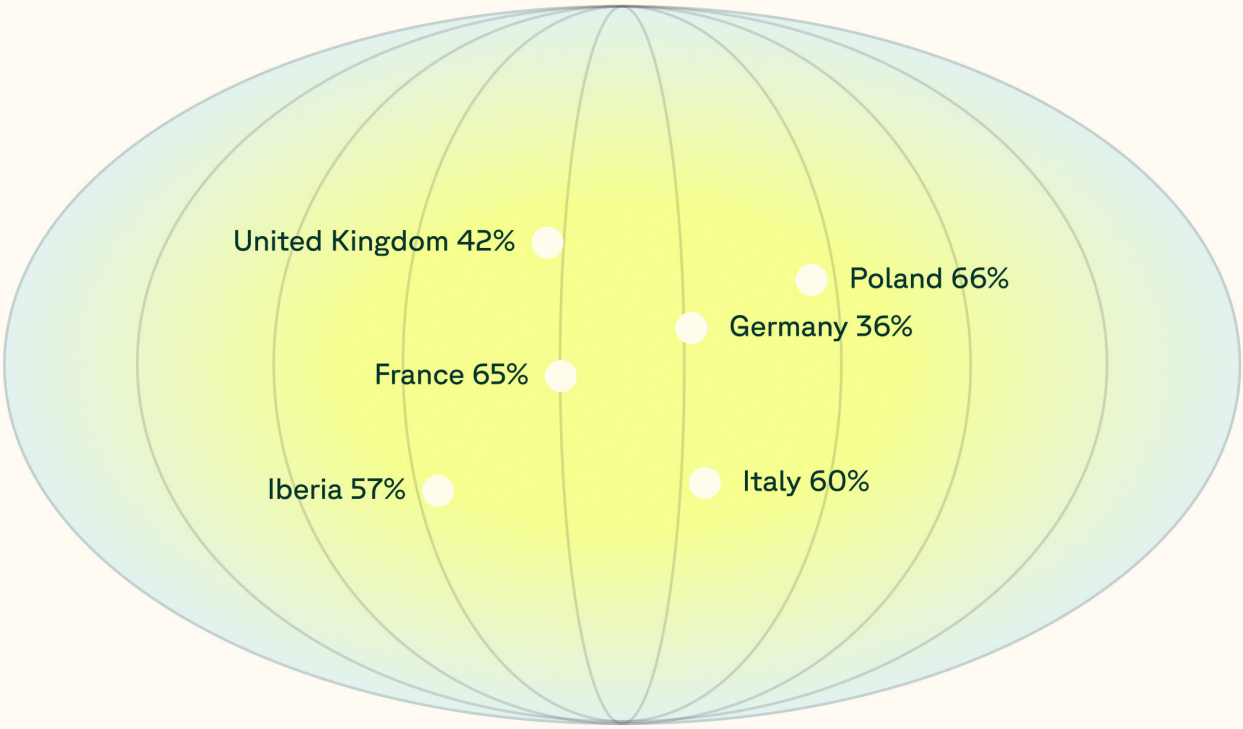


Serena Borbotti Frison
General Director, Allied For Startups

Allied FOR STARTUPS

# 09. Where Europe builds differently

# Where Europe *builds differently*




United Kingdom n=400

## 55%

**The paradox**

Britain pays best: 55% got a raise last year, vs. 42% in the rest of Europe. And it builds least: last in output gains, last in orchestration, lowest AI dependency. The UK has the money and the market. What it has not done yet is reorganize the work.

Iberia n=197

## 46%

**The delivery belt**

Spain and Portugal ship: 46% of their practitioners got most or all of their AI projects into production, against a 35% European average. They also run Europe's biggest AI closet: 31% keep their AI use quiet. The talent that delivers most talks about it least.

Italy n=70, directional

# 87%

**The agent capital**

87% of Italian respondents keep at least one AI agent running in real work, the highest figure in Europe. 80% call EU regulation a professional advantage. Italy is not waiting for the agentic era. It is already operating it.

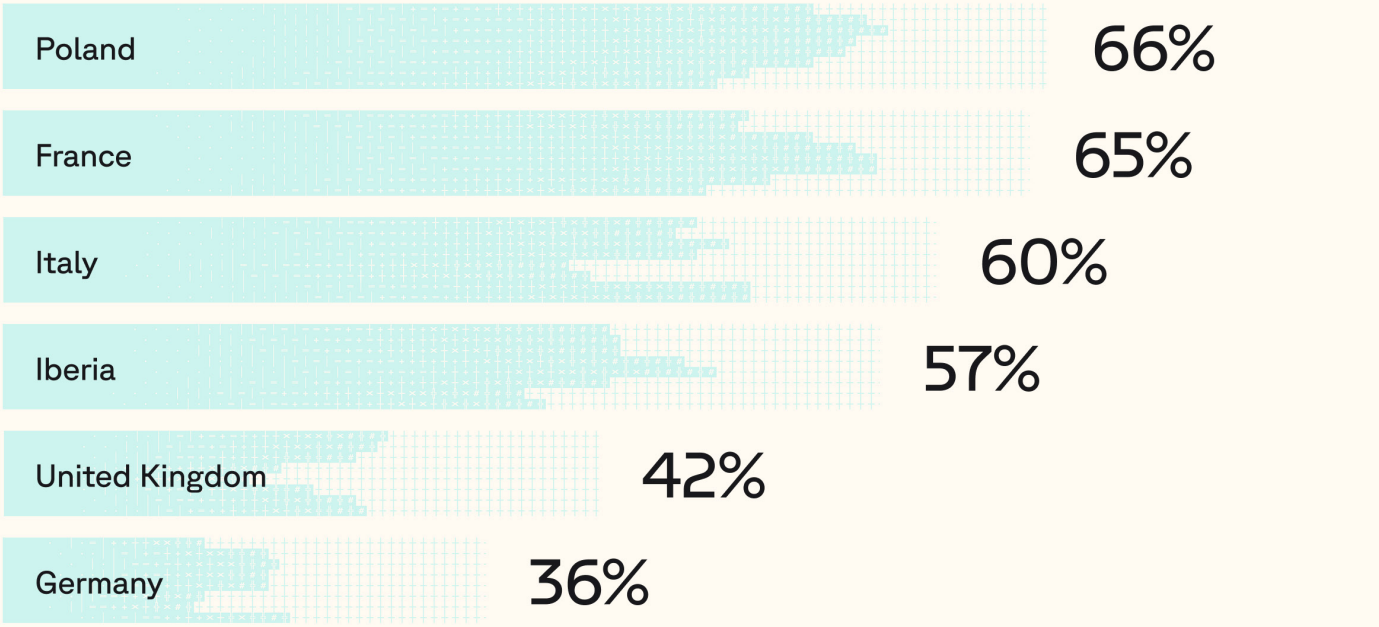
France n=51, directional

# 46%

***La nouvelle vague* (the new wave)**

French respondents report Europe's highest output gains (65% above +25%) and its strongest independence pull: 46% of employed respondents are seriously considering going independent, double the European average.

**Europe's AI map is upside down**




Share reporting output gains above +25% thanks to AI. Europe's two biggest tech economies are its adoption laggards. Germany (n=73) and Poland (n=67): directional.

# AI as a driver of internationalization

At ICEX we are aware of its potential and have been applying it to our own management for some time now. We are using it to streamline internal tasks and reduce bureaucracy, with a very specific goal: to free up time and resources to devote to what really matters, offering better services to companies that want to expand abroad. And we are not only applying AI internally. Our own portal has been designed with AI and has become one of the most advanced tools of the General State Administration in terms of browsing personalization, adapting content and services to the needs of each company and each user.

Therefore, it is not only about using it to be more efficient, but to better understand other markets, detect new opportunities, get to know consumers in other countries and adapt products and services more quickly and at a lower cost.

And Spain has the capabilities to do it: we are developing AI talent and solutions that are already reaching real production above the European average. That tech talent is today one of our great internationalization assets. Because we can not only export products and services: we can also export knowledge, technology and the capacity to build solutions that work.



Elisa Carbonell
CEO, ICEX

ICEX España Exportación e Inversiones

# 10. Five predictions we are willing to be graded on

# Five predictions we are willing *to be graded on*

01

**The independent share keeps growing**

47% of employees expect more of their company's work to flow to independent AI Builders by the end of 2027. Only 11% expect the opposite. The insiders are telling you where this goes.

02

**Orchestration becomes the core technical skill**

44% plan to learn AI agent orchestration this year, more than any other skill. By 2027, "can you run agents in production" will be a standard interview question.

03

**The AI closet empties**

Disclosure already reads as a credential for 37%. Expect proof of how you work with AI to become part of every serious technical profile.

04

**The pay gap forces the question**

Half the workforce delivers over 25% more with zero salary recognition. Either compensation models adapt, or the 24% considering independence stops considering and starts moving.

05

**Europe's laggards wake up**

The UK and Germany pay the most and adopt the least. The correction is worth more than any single AI product launch on the continent.

# Artificial intelligence is creating a new generation of entrepreneurs.

"Artificial intelligence is creating a new generation of entrepreneurs: one in four tech professionals is considering independent work, and they are precisely the ones who best master these tools. For the Spanish ecosystem it is an enormous opportunity, and for Enisa, confirmation that the next wave of innovative companies is already underway."



Carolina Rodríguez
CEO, Enisa

GOBIERNO DE ESPAÑA | MINISTERIO DE INDUSTRIA Y TURISMO | enisa

# Every finding points at *the same gap*

Europe has the talent: it ships, it orchestrates, it stays by choice. What Europe lacks is the structure to let that talent do its best work, and to pay it what that work is now worth.

Closing that gap is why Shakers exists.

Most enterprises have an AI strategy. Few have the senior talent to deliver on it. Shakers is the home of Europe's AI Builders: a curated community of certified experts in AI, engineering, data and product, where only 4% of applicants pass our certification process. Companies incorporate them in their teams within days to take AI work all the way to production. Founded in Madrid in 2021, Shakers works with over 600 clients including Microsoft, BBVA and Telefónica across Europe.


## You build with AI? *Prove it.*

Certify your skills at Shakers and the best projects will come to you.

**Join Shakers**

## Your AI roadmap needs Builders, *not slides.*

Meet certified, ready_to_build talent for your next AI project in 72h.

**Start a project**

# 11. Appendix: all questions, all answers

**Current working model**

Base n=1039

| | |
|---|---|
| Independent / freelancer | 22% |
| Full-time employee | 65% |
| Employee who also works independently | 13% |

**Country of residence**

Base n=1039

| | |
|---|---|
| United Kingdom | 39% |
| Spain | 14% |
| Italy | 7% |
| Portugal | 5% |
| France | 5% |
| Rest of Europe (18 countries) | 31% |

**Primary area of work**

Base n=1039

| | |
|---|---|
| Software engineering | 36% |
| AI / ML engineering | 11% |
| Data | 18% |
| DevOps / platform | 5% |
| Product / tech lead | 11% |
| Product design | 5% |
| Other technical | 13% |

**Years of professional experience**

Base n=1039

| | |
|---|---|
| 3 to 5 | 43% |
| 6 to 10 | 27% |
| 11 to 15 | 13% |
| 16 to 20 | 8% |
| 21 to 25 | 4% |
| More than 25 | 4% |

**Size of employer**

Base n=806

| | |
|---|---|
| Startup | 15% |
| Scale-up | 22% |
| Mid-sized company | 20% |
| Enterprise | 42% |

**Years working independently**

Base n=233

| | |
|---|---|
| Less than 2 | 18% |
| 2 to 5 | 45% |
| 6 to 10 | 17% |
| More than 10 | 20% |

**Before going independent**

Base n=233

| | |
|---|---|
| Employed in the same field | 53% |
| Employed in another field | 24% |
| Studying | 11% |
| Always been independent | 12% |

**How independents charge**

Base n=233

| | |
|---|---|
| By the hour | 45% |
| By the day | 20% |
| By project | 34% |

**Where their clients or employers are**

Base n=1039

| | |
|---|---|
| Mostly in their own country | 36% |
| Mostly elsewhere in Europe | 25% |
| Mostly in the US | 12% |
| A mix of domestic and international | 26% |

**AI tools used at least weekly**

Base n=1039 · Multiple answers allowed

| | |
|---|---|
| ChatGPT | 71% |
| Claude | 57% |
| Gemini | 51% |
| Claude Code | 43% |
| GitHub Copilot | 37% |
| Perplexity | 13% |
| Cursor | 11% |
| n8n | 6% |
| LangChain | 4% |
| Windsurf | 3% |
| Make / Zapier | 3% |
| Custom agents | 3% |
| Other | 10% |
| None | <1% |

**AI agents or automated workflows running in real work**

Base n=1039

| | |
|---|---|
| None | 27% |
| 1 to 2 | 56% |
| 3 to 5 | 14% |
| More than 5 | 3% |

**Tasks most delegated to AI (up to 3)**

Base n=1039 · Multiple answers allowed

| | |
|---|---|
| Documentation | 43% |
| Research | 39% |
| Refactoring & code review | 35% |
| Debugging | 33% |
| Communication | 31% |
| Testing & QA | 25% |
| Data work | 17% |
| Boilerplate code | 17% |
| Design | 16% |
| Admin | 14% |
| Other | 2% |
| None | 3% |

**Share of work spent orchestrating AI**

Base n=1039

| | |
|---|---|
| None | 4% |
| 1% to 25% | 43% |
| 26% to 50% | 30% |
| 51% to 75% | 15% |
| More than 75% | 8% |

**Where most working time goes**

Base n=1039

| | |
|---|---|
| Directing AI and framing problems | 32% |
| Producing deliverables by hand | 32% |
| Architecture and design decisions | 17% |
| Communication and coordination | 19% |

**AI projects worked on, last 12 months**

Base n=1039

| | |
|---|---|
| None | 15% |
| 1 to 2 | 38% |
| 3 to 5 | 25% |
| More than 5 | 21% |

**AI projects in production (live 90+ days)**

Base n=882

| | |
|---|---|
| All of them | 12% |
| Most (over 75%) | 23% |
| About half | 28% |
| A few (under 25%) | 28% |
| None | 10% |

**Change in output thanks to AI**

Base n=1039

| | |
|---|---|
| Decreased | 1% |
| No change | 7% |
| +1% to +25% | 42% |
| +26% to +50% | 31% |
| +51% to +100% | 14% |
| More than doubled | 6% |

**Where the time freed up by AI goes**

Base n=1039

| | |
|---|---|
| Shorter days, more free time | 28% |
| More clients or side projects | 14% |
| A higher rate or raise | 3% |
| Client or employer absorbs it | 28% |
| Lost to meetings and admin | 15% |
| Not applicable | 11% |

**Pay change, last 12 months**

Base n=1039

| | |
|---|---|
| Went up | 47% |
| Stayed the same | 47% |
| Went down | 4% |
| Prefer not to say | 2% |

**Size of pay increase (pay went up)**

Base n=489

| | |
|---|---|
| 1% to 5% | 44% |
| 6% to 10% | 25% |
| 11% to 20% | 19% |
| 21% to 30% | 6% |
| 31% to 50% | 5% |
| More than 50% | 2% |
| Mean increase | +12% |
| Median increase | +7% |

**Main driver of the pay change**

Base n=1016

| | |
|---|---|
| Nothing changed | 29% |
| Seniority | 21% |
| Employer or client decision | 16% |
| AI skills | 14% |
| Market demand | 13% |
| Competition for talent | 6% |

**Does pay reflect AI productivity?**

Base n=1039

| | |
|---|---|
| Yes | 8% |
| Partially | 29% |
| No | 54% |
| I capture it myself | 3% |
| Not applicable | 5% |

**Gross annual salary, euro markets (€k)**

Base n=440

| | |
|---|---|
| Under 30 | 22% |
| 30 to 45 | 28% |
| 45 to 60 | 21% |
| 60 to 80 | 16% |
| Over 80 | 10% |
| Prefer not to say | 3% |

**Gross annual salary, France (€k)**

Base n=35

| | |
|---|---|
| Under 35 | 17% |
| 35 to 50 | 34% |
| 50 to 65 | 23% |
| 65 to 90 | 23% |
| Over 90 | 3% |

**Gross annual salary, UK (£k)**

Base n=331

| | |
|---|---|
| Under 35 | 10% |
| 35 to 50 | 31% |
| 50 to 70 | 33% |
| 70 to 95 | 16% |
| Over 95 | 9% |
| Prefer not to say | <1% |

**Day rate, euro markets (€)**

Base n=87

| | |
|---|---|
| Under 300 | 55% |
| 300 to 500 | 28% |
| 500 to 700 | 6% |
| 700 to 1,000 | 6% |
| Over 1,000 | 1% |
| Prefer not to say | 5% |

**Hourly rate, euro markets (€)**

Base n=74

| | |
|---|---|
| Under 30 | 43% |
| 30 to 50 | 34% |
| 50 to 75 | 12% |
| 75 to 100 | 4% |
| Over 100 | 3% |
| Prefer not to say | 4% |

**Day rate, UK (£)**

Base n=40

| | |
|---|---|
| Under 300 | 30% |
| 300 to 500 | 30% |
| 500 to 700 | 28% |
| 700 to 1,000 | 5% |
| Prefer not to say | 8% |

**Hourly rate, UK (£)**

Base n=32

| | |
|---|---|
| Under 30 | 38% |
| 30 to 50 | 31% |
| 50 to 75 | 16% |
| 75 to 100 | 12% |
| Over 100 | 3% |

**Do payers know how much of the work is AI?**

Base n=1039

| | |
|---|---|
| Yes, fully | 39% |
| Partially | 36% |
| They don't ask, I don't say | 24% |
| I actively avoid the subject | 1% |

**Effect of disclosing AI use on perceived value**

Base n=1039

| | |
|---|---|
| Increases it | 37% |
| No effect | 28% |
| Depends on the client or context | 21% |
| Decreases it | 13% |

**Paid less or questioned after disclosing AI?**

Base n=1039

| | |
|---|---|
| No | 75% |
| Yes | 5% |
| Not sure | 6% |
| Never disclosed | 13% |

**If AI were banned in their work tomorrow**

Base n=1039

| | |
|---|---|
| Comply, little impact | 40% |
| Comply, quality would drop | 39% |
| Keep using it discreetly | 14% |
| Leave the project or job | 6% |

**Could they do their current work without AI?**

Base n=1039

| | |
|---|---|
| Yes, easily | 40% |
| Yes, with difficulty | 47% |
| No, it would be impossible | 9% |
| I would change jobs | 3% |

**Does the job title describe what they do?**

Base n=1039

| | |
|---|---|
| Yes | 47% |
| Partly | 36% |
| I have outgrown it | 14% |
| It has already changed | 3% |

**Final say: which projects to take on**

Base n=1039

| | |
|---|---|
| I do | 21% |
| Shared decision | 47% |
| Client or employer | 32% |

**Final say: how the work gets done**

Base n=1039

| | |
|---|---|
| I do | 43% |
| Shared decision | 44% |
| Client or employer | 13% |

**Final say: when and where to work**

Base n=1039

| | |
|---|---|
| I do | 37% |
| Shared decision | 36% |
| Client or employer | 27% |

**Final say: which tools and AI to use**

Base n=1039

| | |
|---|---|
| I do | 50% |
| Shared decision | 30% |
| Client or employer | 20% |

**Turned down work, last 12 months**

Base n=1039

| | |
|---|---|
| Once or twice | 34% |
| Several times | 10% |
| Can't afford to | 21% |
| Not my decision | 34% |

**Considering going independent within 24 months**

Base n=806

| | |
|---|---|
| Definitely | 7% |
| Seriously considering | 17% |
| Maybe | 39% |
| No | 37% |

**Main reason to go independent**

Base n=190

| | |
|---|---|
| Autonomy | 43% |
| Income | 43% |
| AI makes it viable | 12% |
| Market demand | 2% |

**Main blocker to going independent**

Base n=806

| | |
|---|---|
| Income stability | 50% |
| Prefer employment | 21% |
| Finding clients | 14% |
| Financial planning | 6% |
| Social protections | 6% |
| Admin and bureaucracy | 3% |

**What would bring independents back to employment**

Base n=233

| | |
|---|---|
| Stability | 40% |
| Money | 27% |
| Social protections | 7% |
| Only an exceptional offer | 12% |
| Nothing, never | 14% |

**Independents' plans for the next 24 months**

Base n=233

| | |
|---|---|
| Keep working the same way | 38% |
| Grow as an independent | 35% |
| Build a team or agency | 17% |
| Move to employment | 10% |

**Company work flowing to independents by 2027**

Base n=1039

| | |
|---|---|
| Much more to independents | 18% |
| Somewhat more | 33% |
| No change | 39% |
| Less, more internal | 10% |

**Skills they plan to learn next (up to 3)**

Base n=1039 · Multiple answers allowed

| | |
|---|---|
| AI agent orchestration | 44% |
| AI governance & compliance | 34% |
| Prompt & context engineering | 30% |
| LLM ops | 29% |
| Software engineering | 28% |
| Leadership | 27% |
| Product | 27% |
| Data & MLOps | 21% |
| Sales & business | 14% |
| Other | 1% |
| None | 3% |

**Building their AI career in Europe**

Base n=1039

| | |
|---|---|
| In Europe, by choice | 67% |
| In Europe, by circumstance | 19% |
| Split between Europe and abroad | 6% |
| Planning to go abroad | 9% |

**Europe's edge in AI**

Base n=1039 · Multiple answers allowed

| | |
|---|---|
| Trust and privacy | 50% |
| Infrastructure | 45% |
| Multilingual talent | 43% |
| Engineering rigour | 35% |
| Sustainable pace | 32% |
| Cost / value | 24% |
| Other | 1% |
| No edge | 12% |

**EU regulation (AI Act, GDPR) as a professional factor**

Base n=1039

| | |
|---|---|
| Already won me work | 26% |
| Expect it to help | 37% |
| No effect | 30% |
| Slows me down | 7% |

State of European AI Builders

SHAKERS

The home of Europe's AI Builders

2026