

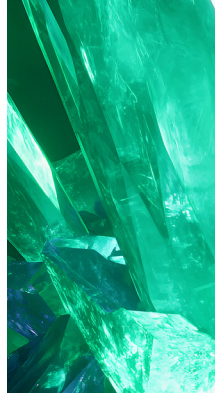
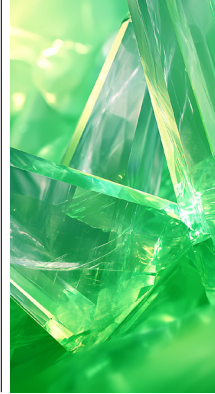





# The Chief of Staff Revolution across Europe in the AI Era

Research Report

# Index

	01	Research question and goal
	02	Methodology
	03	The CoS expansion in Europe: insights from the quantitative analysis
	04	The CoS expansion in Europe: insights from the qualitative analysis
	05	Research contribution

# 01 | Research question and goal

The chief of staff (CoS) has become a critical role in modern organizations, particularly in large and complex corporations operating in rapidly changing environments. The increasing complexity of executive decision-making, together with digital transformation and uncertainty, has elevated the CoS from a coordination role to a strategic position that directly supports leadership effectiveness and organisational agility. While the role has been extensively investigated in the North American context, it remains relatively new in Europe<sup>1</sup>. However, interest in the role has been growing rapidly, driven by its demonstrated contribution to strategic alignment and effective execution. European organizations face specific challenges, such as regulatory fragmentation, cultural diversity, and heterogeneous corporate governance frameworks, that make understanding chief of staff adoption patterns particularly valuable for both academic research and managerial practice.

---

<sup>1</sup> For more details: <https://journal.csa.org/the-chief-of-staff-a-multifaceted-role-designed-for-strategic-impact>

This study addresses this gap by offering a comprehensive, cross-country analysis of the CoS role in European listed firms.

Its main objective is to develop an in-depth understanding of the evolving CoS role within European organizations, highlighting cross-country differences and identifying key trends for its future development, particularly through the lens of technological transformation.

Specifically, the study aims to:

1. Map the diffusion and the level of adoption of the CoS role across European countries and various industries;
2. Analyze the speed of adoption in different European countries and industries, identifying significant peculiarities;
3. Define the profile of the European CoS across clusters, identifying backgrounds, key competencies, and best practices;
4. Examine how AI is reshaping the chief of staff role;
5. Identify strategic and practical implications for CoS operating in European organizations.

The structure of this research is as follows:

- Chapter 2 presents the research methodology;
- Chapter 3 outlines quantitative findings;
- Chapter 4 summarizes qualitative insights;
- Chapter 5 concludes with the key contributions and implications of the research.

This study builds on our previous work, "The Chief of Staff Revolution: Transforming Leadership and Organisational Dynamics – An Italian Viewpoint," which investigated the role, with a deep dive into the Italian context.



## Who is the chief of staff?

Before exploring how the chief of staff role is evolving across Europe, it is important to first define who the chief of staff is.

As in our previous research<sup>2</sup>, the chief of staff is a key and multifaceted role within an organization, serving as a close partner to the executive leadership (CEO, President or other C-level executives/CxO). The chief of staff's primary mission is to support, coordinate and streamline the activities of the leadership, ensuring that the business priorities are implemented efficiently and in full alignment with the organization's overall strategy.

The chief of staff is a dynamic role that evolves to adapt to business growth, innovation, and transformation. This function within the organization's strategic planning process varies depending on the organization's complexity and the competitive landscape.

In highly structured organizations with lower competitive pressure, the CoS focuses on anticipating needs, proposing solutions, and interacting with leadership with greater independence. In this context, the CoS role frequently serves as a springboard for senior management positions.

However, in highly complex organizations operating in competitive environments, the CoS role is even more relevant. The CoS functions as an extension of the CEO/CxO, tasked with the anticipation of complex situations, the filtration of strategic information, and, in select instances, the representation of the CEO/CxO in institutional contexts or at subsidiary levels.

Despite the multifaceted nature of the role, five key areas have been identified where the chief of staff's function can be effectively carried out:

- Enhancing internal coordination;
- Increasing operational efficiency;
- Providing strategic support to the CEO/CxO;
- Facilitating change; and
- Managing workflow and priorities.

---

<sup>2</sup> Source: [“The Chief of Staff Revolution: Transforming Leadership and Organisational Dynamics - An Italian viewpoint”](#)

## **The view of the industry's largest association: the Chief of Staff Association**

To enhance the comprehension of this role and its expected future development within the European context, we included an overview from Trent Smyth, CEO of the Chief of Staff Association. The Association contributed a detailed assessment of the role's diffusion across Europe, informed by its expertise, global reach, and regional leadership.

### **The chief of staff role across Europe**

The chief of staff role is growing in Europe - but it is growing unevenly. Titles differ, career paths vary and the shared frameworks that exist in more established markets are still taking shape.

This section sets out the key considerations shaping the role across the continent, drawing on the Chief of Staff Association's (CSA) experience working with chiefs of staff and their organisations in Europe.

### **An opportunity to align on role definition**

In the United States, the chief of staff role has a well-understood profile. Organisations and recruiters share a common language around what the role does and the value it delivers. In Europe, no equivalent consensus exists. The role is more often shaped by the individual in it or by the culture of the organisation around them.

This creates real risks. Without a shared framework, the role can be under-leveraged, poorly scoped, or left without adequate support structures. Professional certifications and peer networks are beginning to establish common reference points, but there is still significant ground to cover. The CSA's mission sits squarely in this space.

Standardisation does not need to be rigid. A clearer baseline of responsibilities and expectations would benefit both organisations and the people in the role and would contribute meaningfully to its professionalisation across the continent.

### **An undefined career path**

Career progression for chiefs of staff in Europe varies considerably, even within the same country or sector. The seniority of the role, its remit and the expectations placed on it differ widely.

In France, candidates from the grandes écoles carry strong credibility, positioning the role higher in organisational hierarchies. In Sweden, the market is less established, and seniority levels vary significantly. Across much of Europe, particularly in technology, organisations are recruiting chiefs of staff for their sector expertise rather than traditional consulting or business backgrounds.

The UK follows a similar pattern: many new chiefs of staff have spent years working in their organisation's sector before stepping into the role. Without a defined career path, those in the role often struggle to articulate their value, negotiate their remit or plan their next move. Within the CSA membership, we see this play out in different ways: some members treat the chief of staff role as a destination in itself; others use it as a steppingstone to the C-suite. Greater clarity around the role will help both groups make the case for their contributions and their progression.

### **Titles and terminology**

The title “chief of staff” does not translate cleanly across European languages. In France, the closest equivalent is ‘directeur / directrice de cabinet’ - a term with strong political and public sector associations that can create confusion in a corporate context. In Germany, the role is sometimes described as ‘Büroleiter’ or ‘Referent der Geschäftsführung’, neither of which captures the strategic partnership at its core.

Language shapes more than titles. It influences how the role is perceived internally, how authority is granted and how credibility is built. In multilingual organisations, the chief of staff often serves as a bridge - not just between functions, but across languages and cultural frames of reference.

### **The role in an AI-enabled environment**

AI is a dominant conversation in organisations across Europe. As implementation initiatives accelerate, the chief of staff is increasingly being asked to lead or coordinate them. We are already seeing a rise in senior CSA members taking on this responsibility. The foundation of the chief of staff relationship is trust - built through authenticity, sound judgement and genuine empathy. AI can strengthen the effectiveness of that partnership. It is unlikely to replace it.

## Looking ahead

Three factors will shape the professionalisation of the chief of staff role in Europe: a shared language and framework that defines what the role is and what it delivers; a focus on the remit of the role rather than its title, accommodating the range of non-English equivalents in use across the continent; and a continued emphasis on the trust-based partnership between the chief of staff and their principal.

The objective of the present research is to examine the evolution of the role across Europe, leveraging the expertise developed in prior studies to expand the scope of the sample.



## 02 | Methodology

This research investigates the CoS role in Europe through a mixed-methods design, sequentially combining quantitative and qualitative components. The quantitative phase builds a comprehensive database of European CoS to map the diffusion and adoption of this role across countries and industries, identifying major cross-country and cross-sector dynamics. The subsequent qualitative phase is based on a qualitative questionnaire-based survey with European CoS, using open-ended questions to explore the role in depth, identifying key challenges, enabling conditions, and impacts, and deriving both strategic and practical implications for CoS operating in European organizations.



## 02.1 Methodology: quantitative analysis

This research employs a rigorous quantitative methodology structured around six sequential steps, as shown in *Figure 1*, ensuring consistency, objectivity, and alignment with international research standards. This section details each methodological step, providing transparency regarding data collection, selection criteria, and analytical procedures.



*Figure 1* - RESEARCH STEPS

### 02.1.1 Structuring the sample: the first five steps

The methodology was first structured into five rigorous steps aimed at defining the sample panel to be investigated, as described below.

#### STEP 1: GEOGRAPHICAL PERIMETER

The geographical scope of the research is consistent with the United Nations' official definition<sup>3</sup> of Europe; 51 countries across four main geographic areas: Northern Europe (16 countries), Western Europe (9 countries), Eastern Europe (10 countries), and Southern Europe (16 countries).

This comprehensive definition ensures the inclusion of all European countries and avoids arbitrary exclusions.

#### STEP 2-3: FIRM SELECTION

The research focuses exclusively on listed firms, specifically targeting “primary” firms in each country, defined as those included in the main national stock market index.

Recognizing that inclusion in the main national index already signals corporate prominence and economic significance, all firms were considered equivalent units of analysis without further segmentation by size.

---

<sup>3</sup> Source: [United Nations](#)

Of the 51 countries initially considered, 19 were retained based on the presence of an active stock market. This group, referred to as the "EU19" sample<sup>4</sup>, comprises 563 listed firms across 19 countries. Within this sample, 753 individuals were identified as serving in a CoS role, distributed across 168 firms. This yields an overall 29.8% adoption rate<sup>5</sup>.

The geographical distribution of market capitalization, as shown in *Figure 2*, reveals concentration in seven major indices (the UK, Germany, France, Switzerland, Netherlands, Sweden, and Italy), which collectively represent 82% of the European market capitalization.

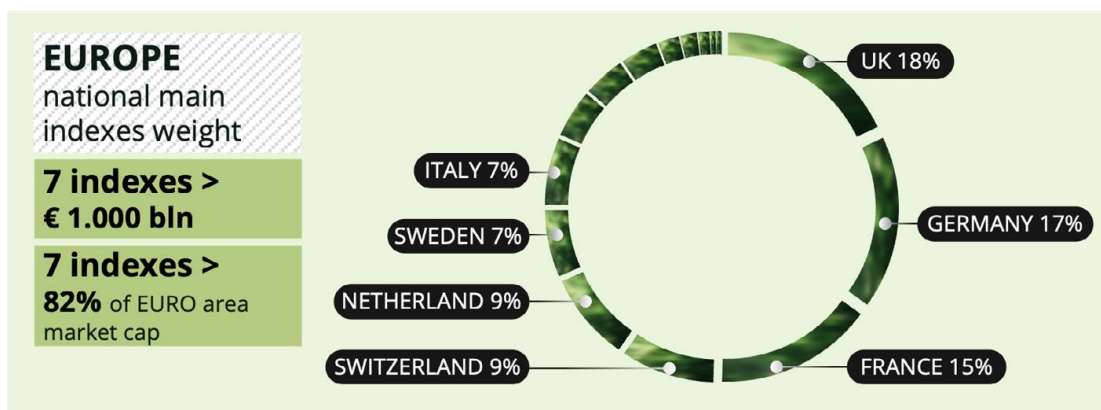


Figure 2 - EU MAIN INDEXES MARKET CAPITALIZATION DISTRIBUTION

#### STEP 4: SECTORAL CLASSIFICATION & DISTRIBUTION

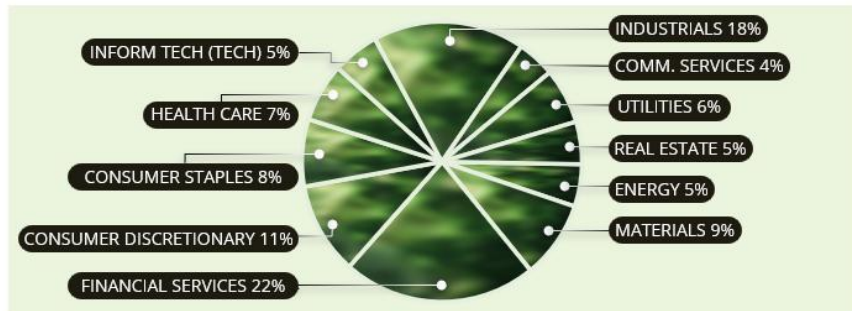
To ensure objectivity and international comparability, the sectoral classification of firms follows the MSCI Global Industry Classification Standard (GICS)<sup>®</sup>, a widely recognized framework in financial analysis and academic research.

---

<sup>4</sup> The countries represented in the EU19 sample include: Austria (ATX, 20 firms), Belgium (BEL 20, 20 firms), Czech Republic (PX, 12 firms), Denmark (OMX Copenhagen 25, 25 firms), Finland (OMX Helsinki 25, 25 firms), France (CAC-40, 40 firms), Germany (DAX, 40 firms), Greece (FTSE/Athex, 25 firms), Ireland (ISEQ 20, 20 firms), Italy (FTSE MIB, 40 firms), Netherlands (AEX, 29 firms), Norway (OBX GR, 25 firms), Poland (WIG20, 20 firms), Portugal (PSI-20, 16 firms), Romania (Bucharest BET, 20 firms), Spain (IBEX-35, 35 firms), Sweden (OMX Stockholm 30, 30 firms), Switzerland (SMI, 21 firms), and the United Kingdom (FTSE 100, 100 firms).

<sup>5</sup> Number of firms with at least one CoS/ Number of overall EU19

According to the GICS taxonomy<sup>6</sup>, the 563 main-index firms in the EU19 sample are distributed across eleven primary sectors, as shown in *Figure 3*: Financial Services (22%), Industrials (18%), Consumer Discretionary (11%), Materials (9%), Consumer Staples (8%), Health Care (7%), Utilities (6%), Energy (5%), Information Technology (5%), Real Estate (5%) and Communication Services (4%),



*Figure 3* - SECTORIAL DISTRIBUTION

Financial services, comprising 22% of total firms, hosts 51% of the CoS active in EU19 sample. The second largest sector per number of firms, Industrials, accounts for only 12%.

The result is clear: different industrial sectors, different technicalities and complexities, different needs of CoS.

## STEP 5: INCLUSION AND EXCLUSION CRITERIA

In this step, criteria for inclusion or exclusion of CoS from the sample were established, as shown in *Table 1*.

The inclusion criteria specified three primary keywords: “chief of staff”, “CoS” and “Head of CxO Office.” Data provides a snapshot as of November 2025.

Data sources included official company websites, LinkedIn professional profiles and primary financial data providers (Reuters, Bloomberg). Only CoS working in the country where their company is listed were included in the sample.

In countries with a high concentration of CoS roles - particularly France - stricter inclusion criteria were applied to ensure focus. These supplementary inclusion criteria included: (1) job titles limited to “chief of staff” or “Head of CEO Office,”

---

<sup>6</sup> For more details: [MSCI](#)

(2) direct reporting to executive roles, and (3) consolidated professional seniority.

Concerning the exclusion criteria, this study explicitly excluded CoS in subsidiaries, focusing solely on roles within the main company.

It should be noted that, due to methodological rigor, this research investigates only and exclusively CoS operating in the European business world. For this reason, CoS operating in the public administration sector were not investigated; this reflects the fact that CoS operating in the public administration sector pursue different objectives both within the microcosm of public administration and in a potential comparison with the business world.

INCLUSION CRITERIA	
<b>Keywords</b>	"chief of staff", "CoS" and "Head of CxO Office"
<b>Data as of</b>	November 2025
<b>Data source</b>	Company website, LinkedIn, and primary financial data provider (Reuters, Bloomberg)
<b>CoS profile restriction</b>	CoS based in the same country where the company is listed
<b>Additional inclusion criteria</b>	<ul style="list-style-type: none"> <li>• specific keywords in the job title "chief of staff" and "Head of CEO Office"</li> <li>• principal: CEO, President or equivalent</li> <li>• minimum "career" seniority of 10 years in (excluding "low tier" CoS)</li> </ul>
EXCLUSION CRITERIA	
<b>Subsidiaries</b>	Excluded (only CoS in the main company, at various level)
<b>Public administration sector</b>	Excluded (only and exclusively CoS operating in the business world)

TABLE 1 - INCLUSION CRITERIA

### 02.1.2 Screening - the TOP-5 panel (Step 6)

Among the EU19 sample, a critical concentration pattern emerged: in the seven most capitalized EU countries, Switzerland and the Netherlands were identified as having several non-local firms listed for non-direct business purposes. This led to focus on a restricted subset, labelled the "TOP-5": France, Germany, Italy, the UK, and Sweden.

These countries host almost 71% of all firms with at least one CoS (i.e., 120 firms w/CoS over 168 of the EU19 sample) and represent 64% of total European market capitalization, suggesting a strong association between CoS adoption,

firm size, and market prominence. The average number of CoS per firm over the total 250 listed firms of the TOP-5 sample is 2.5<sup>7</sup>, underscoring a markedly higher intensity of adoption compared to EU19 Sample (i.e., 1.3). *Figure 4* shows a recap of TOP-5 sample.



Figure 4 - THE TOP-5 SAMPLE

The methodological steps collectively ensure the research’s rigor, replicability, and validity. This provides a robust foundation for the analytical findings presented in subsequent sections.



## 02.2 Methodology: the qualitative analysis

To complement the quantitative findings on the CoS landscape in Europe and enable a more comprehensive analysis, a qualitative analysis was also performed. This consisted of a qualitative questionnaire-based survey with 16 European in leading organizations in France, Germany, the UK, and Italy.

The respondents, all members of the Chief of Staff Association, work in listed European firms across Financial Services, Technology, Energy & Heavy Industries, Health Care & Life Sciences.

This qualitative questionnaire-based survey explores in depth the CoS role in Europe, highlighting key challenges, enabling factors, and its impact. Additionally, it aimed to uncover strategic and practical implications for CoS operating across Europe.

---

<sup>7</sup> 624 CoS distributed over the analysis panel of 250 companies

# 03 | The CoS expansion in Europe: insights from the quantitative analysis



### **03.1 Insights from database analysis: a matrix analysis**

A matrix-based quantitative analysis was applied to map the current CoS market. Following a macro assessment of all EU19 countries, a detailed vertical analysis was performed. It focused on the TOP-5 countries with the highest CoS adoption.

These were examined as a single cluster to compare the characteristics and profiles of CoS professionals.

A horizontal cross-sector analysis then explored variations across industries within these TOP-5 countries, highlighting the specific traits and dynamics of the CoS role in different business contexts.

### **03.2 Synthesis from the TOP-5 and single country portrayal**

Having established that the EU19 sample reflects two different levels of adoption intensity, the research focused on understanding how, even within the group identified as the TOP-5, there are further significant differences among countries.

The quantitative analysis reveals strong cross-country heterogeneity in CoS adoption, underscoring how organisational and cultural factors shape the diffusion of this emerging role. France stood out, with 77.5% of CAC-40 firms employing at least one CoS and an average of 7.1 CoS per listed firm, suggesting a fully institutionalized role consistent with the countries' more hierarchical and formalized management traditions. Germany demonstrated the second highest adoption rate at 55% and 2.8 CoS per company, signaling widespread but less intensive uptake. Italy (40% adoption rate; 0.8 CoS per firm) and the UK (42% adoption rate; 1.8 CoS per firm) showed similar diffusion but different intensity. Sweden (30% adoption rate; 0.5 CoS per firm) forms the lower bound of the TOP-5, reflecting a less mature development of the role.

#### **03.2.1 Quantitative findings about the CoS figure in the EU countries**

Among the TOP-5 countries, France - as shown in *Figure 5* - stood out as a clear outlier, with a very high number of CoS roles spread across most CAC 40 firms, signaling a systemic and multi layered integration of the position within executive offices and business units. Germany shows widespread but more selective use, consistent with a transition from engineering centric models to

more agile, strategically coordinated structures. Italy and the UK display similar adoption rates but different intensities, with the UK evidencing a more consolidated and robust CoS role.

Sweden sits at the lower bound of the TOP-5, where CoS adoption remains low intensity and at an early stage of development.

Gender distribution across the TOP-5 broadly mirrors the pattern in EU19 (55.5% female, 44.5% male), with a slightly greater prevalence of female CoS. Sweden stood out as having perfect gender parity.

COS DISTRIBUTION		TOP-5 CUMULATIVE		FRA		GER		ITA		UK		SWE	
Listed firms	250			40		40		40		100		30	
Listed Firms w/CoS	120	48.0%		31	77.5%	22	55.0%	16	40.0%	42	42%	9	30.0%
Of which Listed Firms w>1 CoS	66	26.4%		21	52.5%	17	42.5%	5	12.5%	18	18.0%	5	17.0%
Total nr of CoS	624			283		112		31		184		14	
Avg CoS/Firm*	2.5			7.1		2.8		0.8		1.8		0.5	

\* considering n° of listed firms

GENDER DISTRIBUTION		TOP-5 CUMULATIVE		FRA		GER		ITA		UK		SWE	
Male	273	43.8%		117	41.3%	55	49.1%	14	45.2%	80	43.5%	7	50.0%
Female	351	56.2%		166	58.7%	57	50.9%	17	54.8%	104	56.5%	7	50.0%

Figure 5 - CoS DISTRIBUTION IN THE TOP-5 COUNTRIES

### 03.2.2 Professional Seniority Patterns

Professional seniority patterns shed light on the career trajectories and organisational positioning of chiefs of staff in the TOP-5 countries. Aggregate data, depicted in Figure 6, demonstrates averages in career length (17.1 years), company tenure (9.4 years), and length of time in CoS role (2.2 years). These figures suggest that the CoS role is typically held by experienced professionals with deep firm-specific knowledge who have only recently transitioned into this specialized position.



Figure 6 - SENIORITY CLUSTERIZATION

Tenure patterns confirm that CoS often operates as a transitional role rather than a long-term destination position. The majority of chiefs of staff remain in the role for only a few years (see *Figure 7*), which suggests that the role is “temporary” and is used as a developmental pathway for executives with high potential. Furthermore, it is reasonable to assume that this data is related to the recent creation of the role, and only future analysis can confirm or refute this assumption.

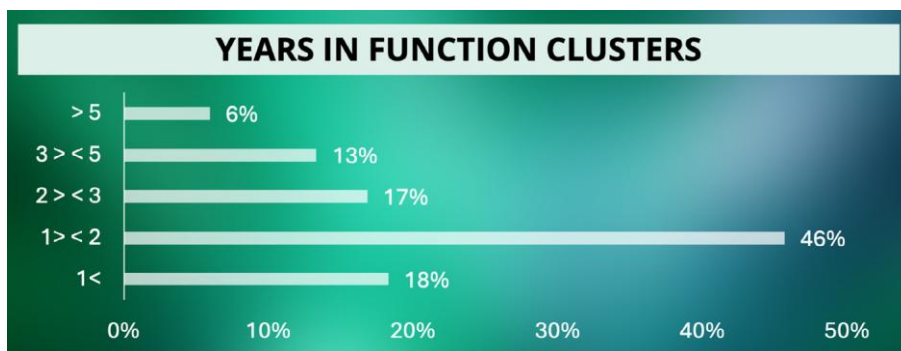


Figure 7 - YEARS IN FUNCTION

Country differences, shown in *Figure 8*, add important nuance to these overall seniority patterns. In Germany, chiefs of staff tend to be younger and have shorter careers, company tenures, and time in role. This is indicative of an earlier adoption phase of the CoS role by individuals, driven by emerging internal talent and rapid growth.

Sweden reflects the opposite trend: CoS roles are held by seasoned insiders with long careers and strong institutional knowledge, reflecting a consensus-oriented culture.

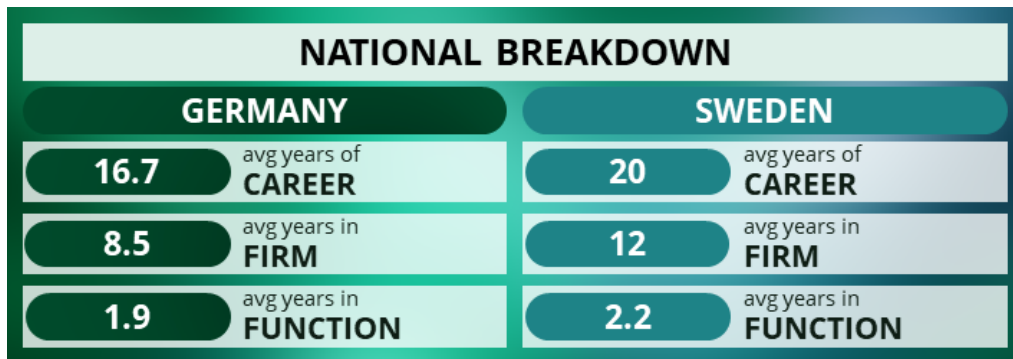


Figure 8 - CROSS COUNTRY BREAKDOWN OF PROFESSIONAL SENIORITY PATTERNS

These seniority patterns have important implications for understanding the organisational role of the chief of staff. Short position tenure suggests the role may serve as a transitional stage for executive career development or as a time-bound assignment focused on specific strategic priorities.

### 03.2.3 Educational and Professional Background Profiles

Educational backgrounds in the TOP-5 sample, depicted in Figure 9, are dominated by economics, finance, and management degrees (54%), followed by engineering/technical fields (12%) and law (6%). This profile reflects the CoS role’s strategic and cross functional demands, prioritizing financial literacy and organisational skills honed through business education.

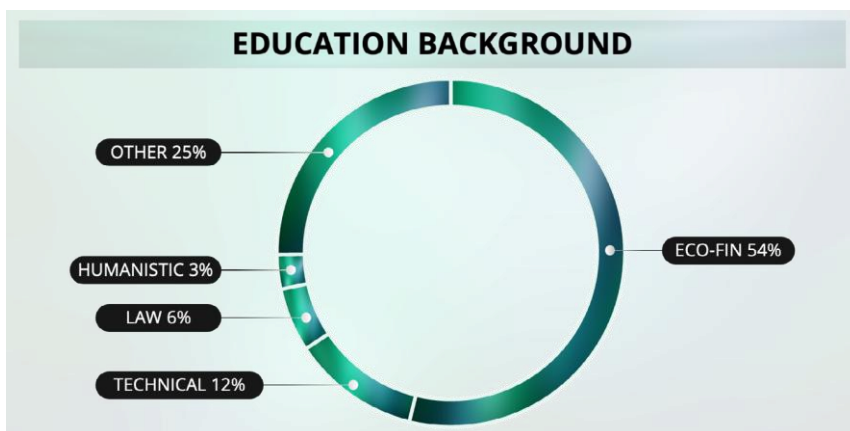


Figure 9 - EDUCATIONAL BACKGROUND

Country variations, as shown in *Figure 10*, added more insights.



Figure 10 - EDUCATION AND PROFESSIONAL BACKGROUND PROFILES

(\* ) Only percentages greater than 10% are shown.

(\*\*) % are calculated considered the total number of CoS per each country.

### Educational Background

Economic financial backgrounds dominate universally (48-58%), establishing a European norm. However, technical/engineering profiles vary significantly: Italy (26%) and Sweden (21%) show strong technical representation. The UK presents a unique profile: lowest economic-financial representation (48%) among the five countries, combined with minimal technical education (5%) and a substantial "other" category (38%), suggesting diverse or undeclared educational backgrounds.

For the Advanced Education (MBA/PhD) Sweden leads at 36%, followed by Germany (22%), while France (9%), Italy (10%), and the UK (13%) lag significantly. This may suggest Swedish organizations require stricter credential requirements, potentially limiting talent pools but ensuring senior-level qualifications.

### Career Path

Former CoS Experience shows striking disparities: the UK leads with 16% of professionals having prior CoS experience, followed by France (10%), while

clusters for Italy, Germany and Sweden are each equal to or below 7%. Moreover, of the 63 CoS who have held the role before, 30 are based in the UK. This suggests the UK has developed a more mature internal talent pipeline, rather than the other countries.

Consultancy backgrounds reveal a different nuance: Germany leads in this category at 44%; this pattern is consistent with the role's relative nascency in German organizations. France follows at 33%, while the UK (14%), Italy (26%), and Sweden (7%) show lower consultancy representation.

The relationship between former CoS experience and consultancy backgrounds suggests mature markets (e.g., the UK) develop internal talent pools, while emerging markets (e.g., Germany) draw from external consulting expertise.

#### **03.2.4 European analysis per country: key highlights**

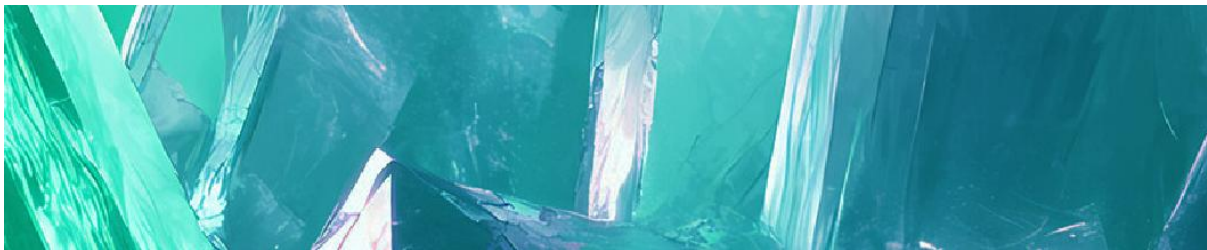
The quantitative analysis reveals a clear divide across Europe: a smaller group of countries where the chief of staff role is well established and consolidating, and a larger group where it remains largely unknown. The most plausible explanation, consistent with market capitalization patterns, is that greater market complexity and more advanced development generate a larger need for stronger coordination at the top-management level, driving the role's institutionalization within large and complex organizations. Within the core adopter countries, diffusion proceeds at different speeds and along distinct trajectories. Consequently, Europe does not move as a single, unified bloc. France, in particular, stands out: its deliberate cultivation of an innovation-driven ecosystem and its dynamism in start-up creation have likely accelerated the early and extensive adoption of a role pioneered by American corporations.

Germany stands out for its rapid recent growth, with evidence on role-holder seniority and the high share of CoS with consulting backgrounds indicating relatively recent diffusion. By contrast, the United Kingdom, where the role has long been consolidated, shows the only truly mature labor market in which CoS are recognized as a distinct professional category, embedded across multiple industrial cycles.

As expected, the CoS role in Europe remains a transitional position, acting as a stepping stone toward executive leadership positions. The average tenure in

function is about 2.2 years, with nearly half of incumbents in the one-to-two-year range, showing limited variation across TOP-5 countries.

While economics and finance backgrounds predominate, only a minority of CoS positions hold advanced academic qualifications. This may reflect the centrality of relational, communication, and rhetorical capabilities that cannot be fully developed through formal education alone and must be honed through experience and close engagement with organisational dynamics and stakeholders. Finally, except for the UK, there is limited evidence of a vibrant open labor market for CoS: individuals typically enter the role from other internal positions and later transition elsewhere, reinforcing its fundamentally transitory nature within managerial career paths.



### **03.3 Sample breakdown: Industrial Sector Portrayal**

#### **03.3.1 Sectoral Adoption Patterns**

The analysis focused on the distribution of the CoS over the industrial sectors, as shown in *Table 2*.

Sectoral patterns suggest that CoS adoption finds fertile ground in contexts characterized by regulatory complexity, stakeholder pressure, and organisational scale. This is confirmed by the results, which show Financial Services and Industrials as the first and second most represented industries in the adoption of the CoS role in Europe.

The Chief of Staff Revolution across Europe in the AI Era

INDUSTRY	COS IN CHARGE		LISTED FIRMS w/COS		Avg COS/FIRM
Financial Services	316	50.6%	36	30.0%	8.8
Industrials	75	12.0%	20	16.7%	3.8
Consumer Discretionary	54	8.7%	14	11.7%	3.9
Health Care	46	7.4%	8	6.7%	5.8
Utilities	40	6.4%	9	7.5%	4.4
Information Technology	30	4.8%	7	5.8%	4.3
Consumer Staples	26	4.2%	12	10.0%	2.2
Communication Services	19	3.0%	7	5.8%	2.7
Energy	16	2.6%	5	4.2%	3.2
Materials	2	0.3%	2	1.7%	1.0
Real Estate	-	-	-	-	-
<b>TOTAL</b>	<b>624</b>	<b>100%</b>	<b>120</b>	<b>100%</b>	<b>5.2</b>

Table 2 - SECTORAL ADOPTION PATTERNS

Financial services dominates the landscape, accounting for 50.6% of all CoS positions in the TOP-5 countries (316 of 624), with an average of 8.8 CoS per adopting firm - more than double the TOP-5 average. Considering the TOP-5 countries, the financial sector represents 30% of the firms with at least 1 CoS. Therefore the “Financial services” could be compared with the “Others” sectors.

	COS %	FIRMS %	AVG COS/FIRMS
FIN. SERVICES	51%	30%	8.8
OTHERS*	49%	70%	3.7

Figure 11 - SECTORAL ADOPTION PATTERNS: FINANCIAL SERVICES VS OTHER SECTORS

(\*) Real Estate demonstrates no CoS presence, while Materials shows only two positions and it was excluded from detailed analysis.

### 03.3.2 Gender Distribution Across Industries

Female chiefs of staff predominate across most sectors (55–63%), aligning with the EU19 sample average. Only Communication Services and Consumer Staples show male majorities (56% and 54% respectively).

### 03.3.3 Sectoral Seniority Profiles

Financial services exhibits above-average seniority across all metrics, as shown in *Figure 12*, assigning CoS roles to highly experienced, deeply embedded professionals (consistent with the sector’s complexity and regulatory demands). Non-financial sectors, by contrast, show lower seniority: this underlines that previous experience, knowledge of the market, and being recognized within the organization structure is less relevant than in the financial services sector. In some firms, particularly those not in the financial services sector, this role is assigned on a mandatory basis for a limited period of time, reflecting earlier professionalization stages and greater use of the role as a developmental step for rising executives, particularly in Consumer Discretionary.

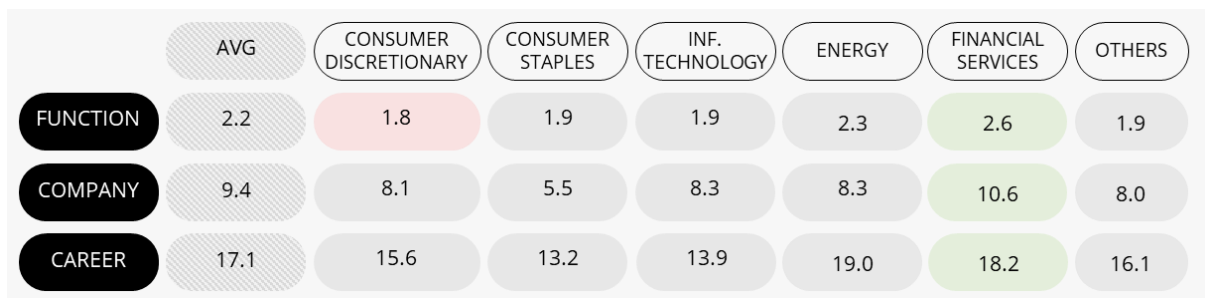


Figure 12 - SECTORAL SENIORITY PROFILES

### 03.3.4 Educational Background

Sectoral educational profiles, as shown in *Figure 13*, deviate notably from TOP-5 averages. While economics-finance backgrounds exceed 50% overall (predominantly in Financial Services), Communication Services (26%) and Industrials (37%) show lower shares.

By contrast sectors such as Communication Services, Energy and Industrials show a relevant amount of CoS with a technical background.

It is worth noting how Utilities stand out with 10% legal background (vs. 6% average), which likely reflects the high level of regulation in the sector; however, the energy sector, despite also being regulated, does not have a single board member with a legal background.

The sector-specific patterns identified suggest that while economic-financial education provides a common foundation for the CoS role, specific industries value complementary educational backgrounds aligned with their core operational and strategic challenges.

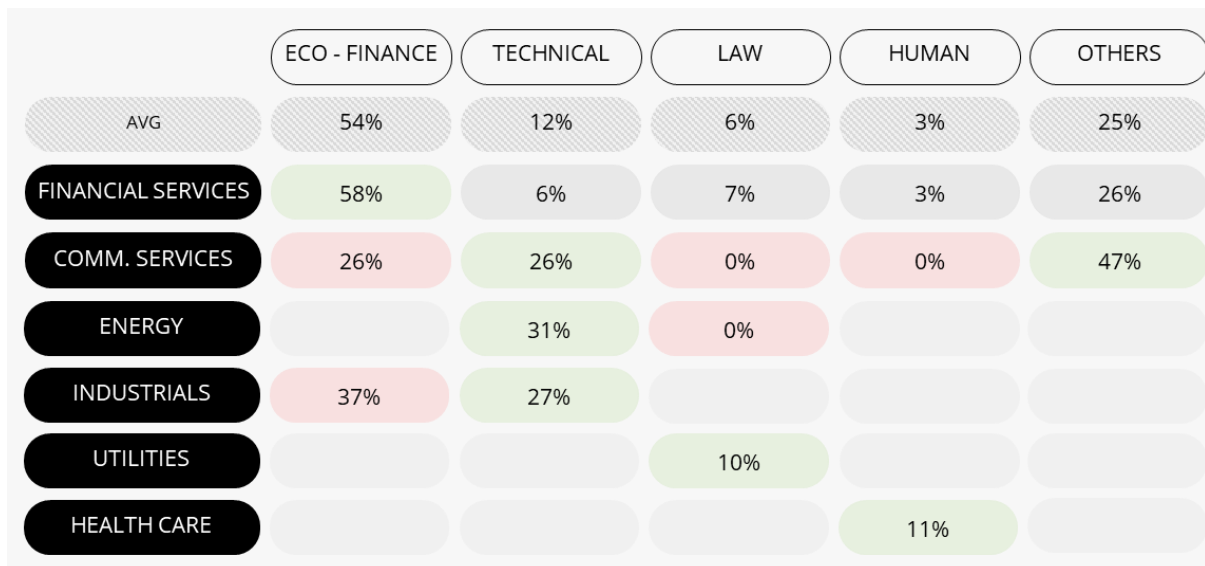


Figure 13 – DATA HIGHLIGHTS | EDUCATIONAL BACKGROUND VARIATIONS BY SECTOR

### 03.3.5 Prior Professional Experience by Sector

Analysis of prior professional experience, as in *Figure 14*, reveals sharp sectoral contrasts. Financial Services has the lowest proportion of consulting backgrounds (21%), favoring internal progression with deep firm-specific knowledge, while non-financial sectors like Consumer Discretionary, Consumer

Staples, IT and Health Care show much higher consulting representation (39%+), reflecting a strategy to hire expertise.

The research also investigates whether CoS have previously held this role, recognizing that CoS positions are often temporary. The analysis reveals significant sectoral variations: Financial Services and Communication Services show approximately 15% of their CoS with prior CoS experience, compared to a 10% average across all sectors. This could indicate the existence of well-established career paths in the CoS sector and, likely, the existence of a specific labor market for these services. In contrast, Healthcare, IT and Consumer Staples remain in an early stage, filling these roles primarily with professionals from general management or consulting backgrounds rather than with "experienced" CoS professionals. This demonstrates an earlier stage of CoS professionalization.

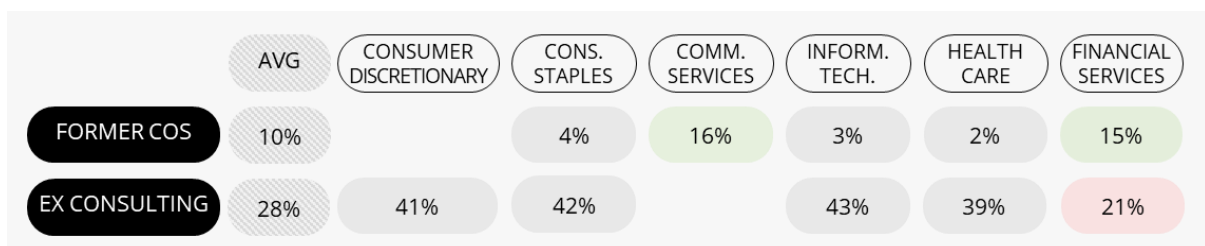


Figure 14 - DATA HIGHLIGHTS | PRIOR PROFESSIONAL EXPERIENCE BY SECTOR

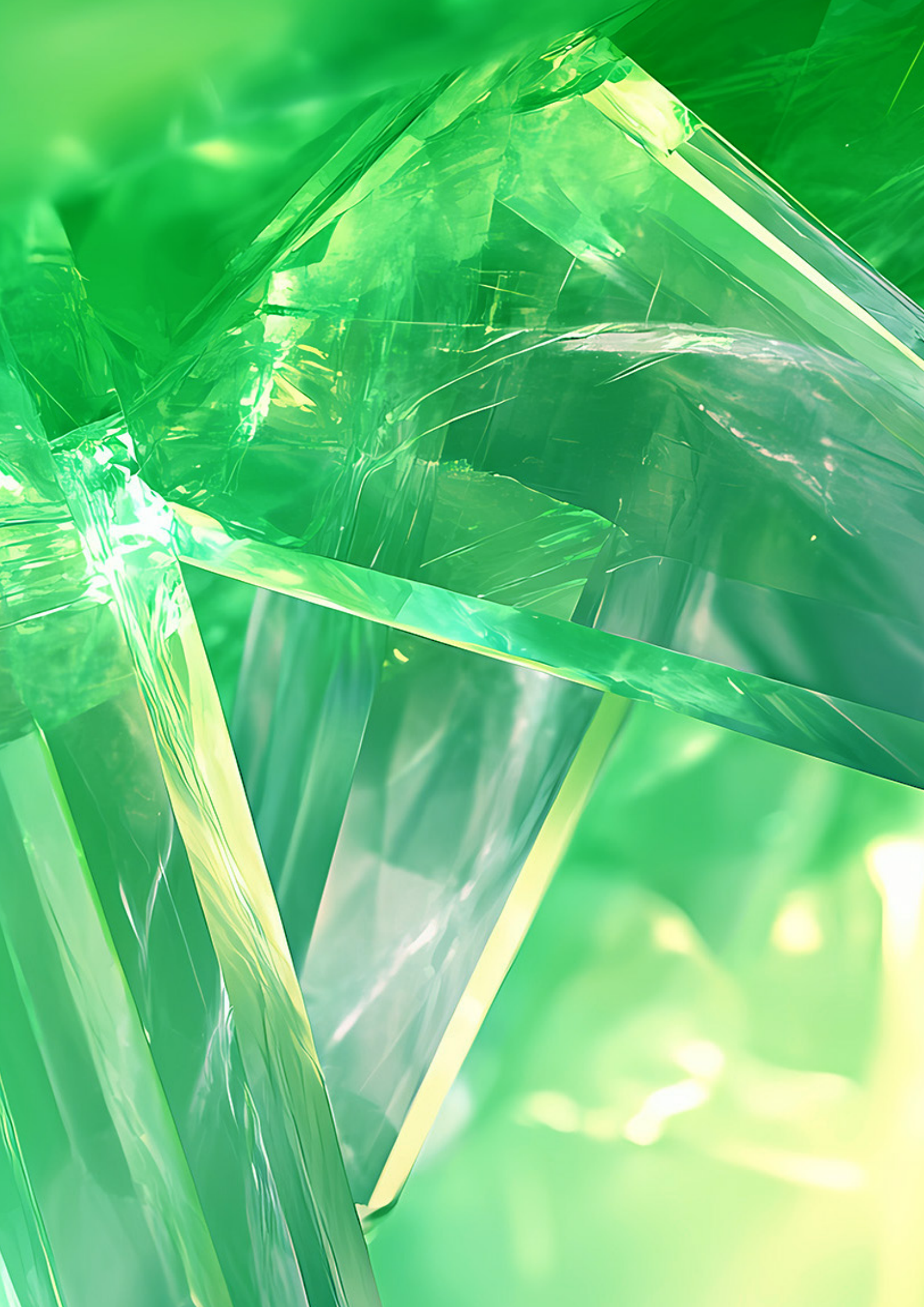
### 03.3.6 European analysis per Sector: key highlights

The European CoS landscape reveals a two-speed dynamic across both countries and sectors. In the TOP-5 countries, consistent patterns emerge in seniority, gender balance, and economics-finance education. Financial Services leads with advanced adoption (roughly double other sectors), higher seniority, and established internal pipelines – mirroring the complexity of universal banks and stringent regulation. Energy echoes this profile, in particular about seniority, due to multinational scale.

## The Chief of Staff Revolution across Europe in the AI Era

Non-financial sectors remain less advanced: tech-heavy industries favor technical backgrounds, Health Care shows a prevalence of humanities profiles suited to stakeholder engagement, and Utilities relies on legal expertise amid regulatory and public-interest pressures. Consulting backgrounds are twice as prevalent in non-financial sectors as in Financial Services, signaling that the role is relatively newer in these areas, while Financial Services records over 15% prior CoS experience, pointing to a more mature talent market.

## 04 | The CoS expansion in Europe: insights from the qualitative analysis



## **04.1 Qualitative questionnaire-based survey**

To support the quantitative findings on the CoS landscape in Europe and enable a more comprehensive and in-depth analysis, a qualitative questionnaire-based survey, based on open-ended questions, was conducted with 16 European CoS across France, Germany, the UK, and Italy.

The respondents, all members of the Chief of Staff Association, work in listed European firms across Financial Services, Technology, Energy & Heavy Industries, Health Care & Life Sciences.

This qualitative questionnaire-based survey aimed to explore in depth the CoS role in Europe, highlighting key challenges, enabling factors and its impact. Additionally, it aimed to uncover strategic and practical implications for CoS operating across Europe. This qualitative analysis concludes with a focus on the strategic and operational impact of AI on the CoS role.

Below are the insights from this qualitative questionnaire-based survey.

### **04.1.1 The evolving role of the chief of staff in Europe**

The evolving role of the CoS in Europe is characterized by increasing institutionalization, strategic relevance, and reliance on internal, experienced talent. Findings showed that organisational familiarity, senior experience, and continuity within the same sector are seen as enabling factors for acting as a trusted advisor to top executives. The predominance of internal promotions confirms both formal recognition of the role and its growing permanence in corporate structures.

Typically, chiefs of staff have accumulated several years of experience within their current organization, enabling a detailed understanding of culture, dynamics, and strategic priorities and underpinning their credibility and influence across leadership levels. This is complemented by substantial professional experience: often exceeding a decade, largely developed within the same industry, thus strengthening their capacity to address sector-specific challenges and contribute meaningfully to strategic decision-making.

Many chiefs of staff describe a shift from operational coordination to greater involvement in organisational transformation and long-term strategic planning. At the core of this evolution lies the relationship with the principal: where mutual trust and transparency are firmly established, CoS tend to become strategic partners in defining and advancing organisational priorities.

For more details about the symbiotic partnership between the CEO and the CoS, with trust as its cornerstone, see our point of view "Inside the Symbiotic Partnership: The chief of staff and their CEO"<sup>8</sup>.

#### **04.1.2 The chief of staff in Europe: A multifaceted role for strategic impact**

The CoS role in Europe now spans four main domains: (1) boosting operational efficiency, (2) driving strategic execution, (3) managing crises, and (4) cultivating key relationships. It combines an operational engine function, ensuring clarity, coordination, and focus on priorities, with that of a strategic partner who can represent the CEO/CxO, challenge proposals, and advance initiatives on their behalf.

Effectiveness depends on condensing complex information into clear recommendations and communicating them rapidly to senior leaders, while proactively surfacing bottlenecks, anticipating risks, and aligning the organization around shared strategic objectives. The findings reveal that the role has shifted over time from task management to strategic influence, with CoS acting as core enablers of leadership effectiveness, problem-solvers, confidants, and integrators who ensure that leadership intent is consistently translated into coordinated action across the organization.

#### **04.1.3 Challenges and gains of the chief of staff in Europe**

European CoS describe their role as being defined as much by ambiguity as it is by impact. They anticipate and resolve issues before they reach the principal, answer most questions directly, manage sensitive political and interpersonal dynamics, and act as a critical filter for executive leadership in fast-paced environments. For these executives, a central challenge is operating amid shifting priorities and incomplete clarity, which demands judgement, adaptability, strategic awareness, discretion, strong relational and emotional intelligence. This requires continuous strategic alignment with the principal around a focused set of evolving goals.

Despite its demands, the findings stressed that the role offers distinctive rewards, including a panoramic organisational view, close exposure to high-stakes decision-making, and broad relationship-building opportunities, making it a robust foundation for subsequent leadership roles.

---

<sup>8</sup> Source: [Inside the Symbiotic Partnership: The chief of staff and their CEO | Deloitte Italy](#)

#### **04.1.4 The impact of the chief of staff in Europe**

The findings indicate that CoS generate their strongest impact by acting as strategic filters and amplifiers of execution efficiency, frequently freeing up to an estimated 40% of their principal's time.

Their effectiveness is reflected in the leader's ability to operate at peak performance, with CEO/CxO crediting the partnership for greater focus on long-term priorities, high-value external engagements, and strategic initiatives that were previously constrained by operational demands.

Key impact indicators of the CoS role include improved decision quality, sharper time allocation, and proactive issue resolution, with CoS often able to address the majority of questions independently and resolve a substantial share of issues without requiring direct CEO/CxO involvement. As a result, the role is widely recognized as an extension of the CEO/CxO and a powerful force multiplier for strategic impact within organizations.

#### **Why AI matters to chief of staff**

The qualitative analysis concludes with a focus on the strategic and operational impact of AI on the CoS role.

Chief of staff identify great opportunities for value creation in AI. Since the CoS viewpoint often serves as a valuable proxy for the CEO's /CxO's perspective, these findings offer valuable guidance on strategic areas for value creation. CoS perspectives reveal that AI stands as the top strategic priority for organizations. Accelerating AI adoption therefore emerges as a critical lever for driving organisational growth, positioning the CoS as a strategic enabler of executive decision-making.

Looking at the impact of AI on the CoS role, CoS predict game-changing efficiency gains from AI adoption across both their strategic and operational activities. It is clear that AI acts as an enabler for the operational activities of the CoS, allowing them to dedicate greater focus to high-value strategic initiatives and amplify their overall strategic impact.

Looking at the practical applications of Agentic AI, CoS identify communication and content development as the top areas where AI will have the greatest influence on their work over the next one to two years, followed by data analysis and decision support. Specifically, if CoS could have a personalized AI agent to support their role, they would prioritize optimizing operational orchestration to track projects, deadlines, objectives and key results.

AI strengthens the CoS role as a guardian of strategic alignment, ensuring that execution remains tightly connected to strategic objectives and that leadership can reallocate resources quickly when priorities shift.

## 05 | Research contribution

This research advances both academic debate and managerial practice by offering empirical evidence on how the chief of staff role is evolving in Europe, informing strategic HR planning, organisational design, and leadership development, and establishing a baseline for future longitudinal analysis.



This research has several important implications for executive leadership.

First, it documents the main trends in European CoS adoption, an area still underexplored in comparison to North America. It demonstrates chiefs of staff are strongly concentrated in the five largest economies (France, Germany, the United Kingdom, Italy, and Sweden) which together represent 64% of Europe's market capitalization. It also confirms that diffusion is closely linked to organisational scale, structural complexity, and internationalization. In more mature, high-capitalization markets, the role tends to become institutionalized as a structural lever for executive coordination. This suggests that the greater market complexity and more advanced development generate stronger coordination needs at top-management level, driving the role's institutionalization within large and complex organizations.

Second, sectoral patterns show CoS role strongly correlates with regulatory complexity, stakeholder pressures, and organisational scale. The financial services sector dominates the landscape, exhibiting an adoption rate nearly double the cross-sector average. This suggests that intense regulation, risk management pressures, and multifaceted coordination needs in the financial services industry elevate the relevance of the CoS role. The Industrials industry follows as the second-largest adopter, benefiting from strategic oversight of complex supply chains, global presence, manufacturing networks, and diversified business units.

Third, this research demonstrates the potential for the chief of staff role to act as a stepping stone for future executive roles. Tenure patterns confirm that the CoS role often operates as a transitional position rather than a long-term destination, serving as a developmental assignment for high-potential executives. Fourth, the study shed light on the distinctive features of the European CoS profile, highlighting the need for deep understanding of strategic priorities and executive dynamics, capacity to navigate organisational culture, and mastery of interpersonal relations and informal decision-making as critical enablers of effectiveness.

Fifth, as AI reshapes how organizations create value, CoS are evolving from project coordinators into AI-enabled orchestrators of resources and capabilities. Orchestration is at the heart of the CoS for AI-powered agile organizations. By developing AI literacy and changing management skills, CoS can amplify their orchestration role and become a distinct source of competitive advantage for the CEO/CxO and the organization, translating strategy into orchestrable missions where skills, teams, and AI agents are dynamically recombined around strategic priorities. In the AI era where leaders see agility as their key source of

competitive advantage<sup>9</sup>, the CoS becomes an AI-empowered chief orchestrator of agility, enabling leaders to continuously align people, processes, and technology, and to turn uncertainty and complexity into advantage.

To conclude, this research highlights the growing relevance of the CoS as a pivotal organisational role, increasingly emerging - albeit unevenly - across Europe. Further research is needed to explore the conditions under which the CoS role creates the most value: when and why it tends to thrive, in which organisational contexts it has proven effective or faced challenges, and which organisational, cultural, and other factors may influence its success.

---

<sup>9</sup> For more details: [Deloitte's 2026 Global Human Capital Trends](#)

# Acknowledgements

We want to express our deepest gratitude to the Chief of Staff Association for its generous contribution, sharing invaluable insights and expertise on the chief of staff role at a European level. Their perspective has been instrumental in enriching our research with a more comprehensive understanding of how the CoS role is evolving across Europe.



# Contacts

## **Stefania Pizzuto**

Partner

Chief of Staff Program Leader

stpizzuto@deloitte.it

## **Matteo Zanza**

Senior Partner

Human Capital Leader

mzanza@deloitte.it

## **Paolo Gianturco**

Senior Partner

NSE Banking&Capital Market Sector Leader

DCM FSI Consulting Leader

pgianturco@deloitte.it

## **Gimede Gigante**

Direttore I.C.E. - Innovation and Corporate

Entrepreneurship, SDA Bocconi School of

Management

gimede.gigante@unibocconi.it



This communication contains general information only, and none of Deloitte Touche Tohmatsu Limited (DTTL), its global network of member firms or their related entities (collectively, the “Deloitte organization”) is, by means of this communication, rendering professional advice or services. Before making any decision or taking any action that may affect your finances or your business, you should consult a qualified professional adviser. Deloitte refers to one or more of Deloitte Touche Tohmatsu Limited (DTTL), its global network of member firms, and their related entities (collectively, the “Deloitte organization”). DTTL (also referred to as “Deloitte Global”) and each of its member firms and related entities are legally separate and independent entities, which cannot obligate or bind each other in respect of third parties. DTTL and each DTTL member firm and related entity is liable only for its own acts and omissions, and not those of each other. DTTL does not provide services to clients. Please see [www.deloitte.com/about](http://www.deloitte.com/about) to learn more.