2020

Lithuania's Business Services & ICT Industry Employee Report

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Preface

Dear Ladies and Gentlemen,

It is our pleasure to provide you with this first of its kind GBS & ICT industry-wide employee survey report.

This survey, which we developed in tandem with our partners, has a sole purpose in mind – to provide our community with actionable insights into how their employees view the industry they work, what motivates them most, and how they view their future career path.

We sincerely hope that the knowledge gained from this survey will give companies a deeper understanding of how their employee value proposition may be refined to better address the many needs of our diverse community of more than 20,000 professionals.

With the success of the initial survey, we are eager to make this an annual initiative and hope that through it we will see changes emerge in the ways employees perceive the GBS & ICT industry for the many years to come.

Laura Kavaliauskaite
Head of GBS & ICT Team

About Invest Lithuania

Invest Lithuania is the official agency for Foreign Direct Investment and Business Development under the Ministry of Economy and Innovation.

We'll partner with you to get your business set up and off to the best start possible:

Decision-making

We'll help you make the most informed decisions for your new operations:

- Tailored in-depth market and industry insights.
- Advice on business costs.
- Information concerning the local labor and legal framework.
- Site visits (introduction to peer companies, universities, government authorities, preparation of tailor made, detailed site visit agendas for the location assessment process).

Business Establishment

We'll connect you with everyone you need to know to guarantee a soft landing for your set up:

- Intros and meetings with key market players and relevant governmental institutions.
- Project assessment to identify financial support opportunities from local government and the EU.
- Assistance with PR and marketing strategies before, during, and after the project announcement.

Business Development

Once you are up and running, we'll be there with aftercare and support:

- Assistance with one-off problems.
- Lobbying for greater governmental support.
- Helping businesses to find the right employees through the "Work in Lithuania" program.

iL **Learn more:** investlithuania.com

Business services & ICT industry overview

85

Number of investor companies with GBS & ICT centres[1]
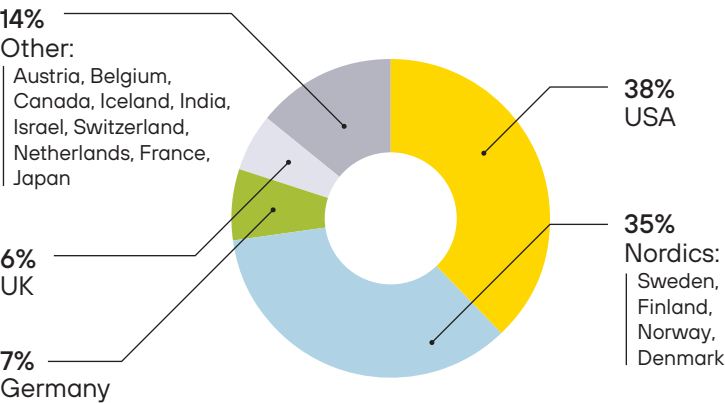
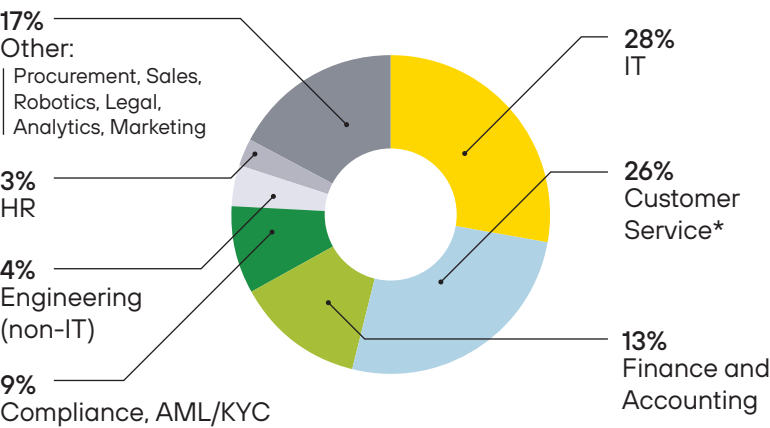## 20,170

Number of employees in GBS & ICT centres[2]

11

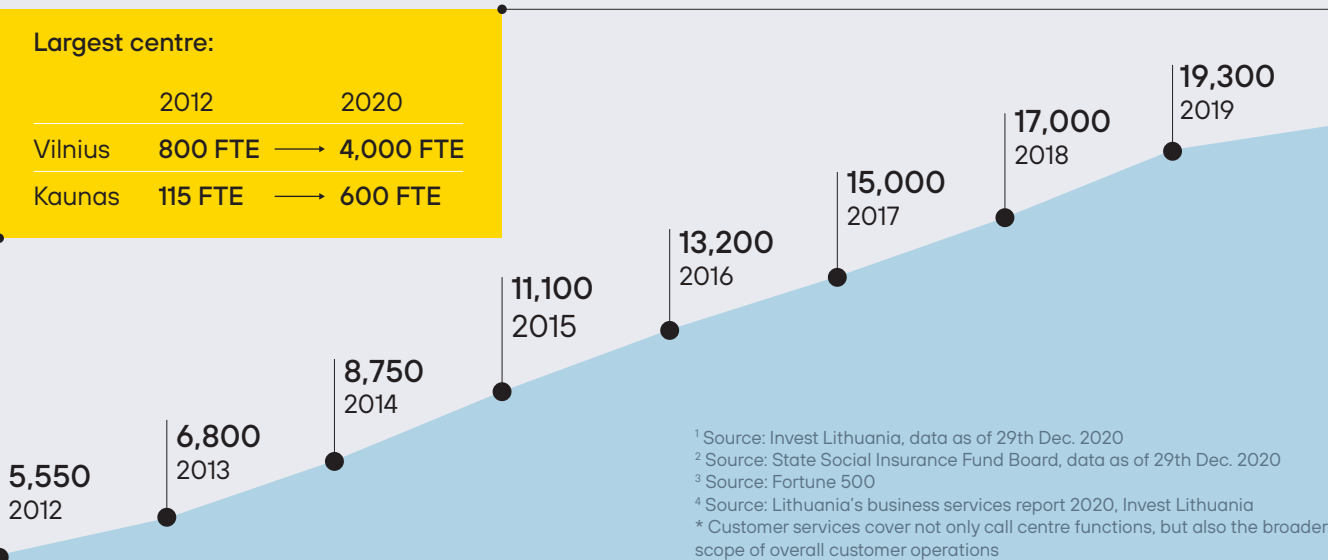Number of Fortune 500 investors with Lithuanian GBS & ICT centres[3]

Share of centres by parent HQ location[4]

- 14% Other: Austria, Belgium, Canada, Iceland, India, Israel, Switzerland, Netherlands, France, Japan
- 6% UK
- 7% Germany
- 38% USA
- 35% Nordics: Sweden, Finland, Norway, Denmark

Share of employees by function[4]

- 17% Other: Procurement, Sales, Robotics, Legal, Analytics, Marketing
- 3% HR
- 4% Engineering (non-IT)
- 9% Compliance, AML/KYC
- 28% IT
- 26% Customer Service*
- 13% Finance and Accounting

People employed in GBS & ICT industry[1]

Largest centre:

	2012	2020
Vilnius	800 FTE →	4,000 FTE
Kaunas	115 FTE →	600 FTE

- 5,550 2012
- 6,800 2013
- 8,750 2014
- 11,100 2015
- 13,200 2016
- 15,000 2017
- 17,000 2018
- 19,300 2019
- 20,170 2020

[1] Source: Invest Lithuania, data as of 29th Dec. 2020
[2] Source: State Social Insurance Fund Board, data as of 29th Dec. 2020
[3] Source: Fortune 500
[4] Source: Lithuania's business services report 2020, Invest Lithuania
* Customer services cover not only call centre functions, but also the broader scope of overall customer operations

About the survey

The aim of the survey is to better understand how employees in the GBS & ICT industry view their employers, job retention, and the ways in which they can gain employment.

The findings of this industry-oriented survey will help companies to gain a greater understanding of the factors that motivate employees when they are selecting an employer. Based on these insights, companies will then be able to refine and improve their employee value propositions.

12 companies with at least 200 employees participated in the survey. These companies combined employ over 8,700 professionals, accounting for over 43% of the total labor force of the GBS & ICT industry.

Data was collected throughout mid. November to mid. December 2020 by Invest Lithuania.

Participant profile

Overall	n=2496	100%
Gender		
Female	n=1,362	53%
Male	n=1,118	47%
Other	n=16	1%
Age		
Under 25 years old	n=321	13%
25-34 years	n=1,456	59%
35-44 years	n=616	25%
45 years or above	n=103	4%
Years in the company		
Less than 1 year	n=511	20%
1-3 years	n=967	39%
3-5 years	n=504	20%
More than 5 years	n=514	21%
Seniority		
Entry-level	n=341	12%
Associate	n=620	24%
Mid-senior level	n=1,125	48%
Manager	n=362	15%
Executive	n=48	2%
Area		
Customer services and customer operations	n=481	18%
Finance, accounting and compliance	n=679	25%
HR, marketing and communications	n=144	6%
IT	n=1,003	42%
Other	n=189	8%

Note: overall industry results are weighted to adjust for difference between the sample and the actual shares of employees in each company.
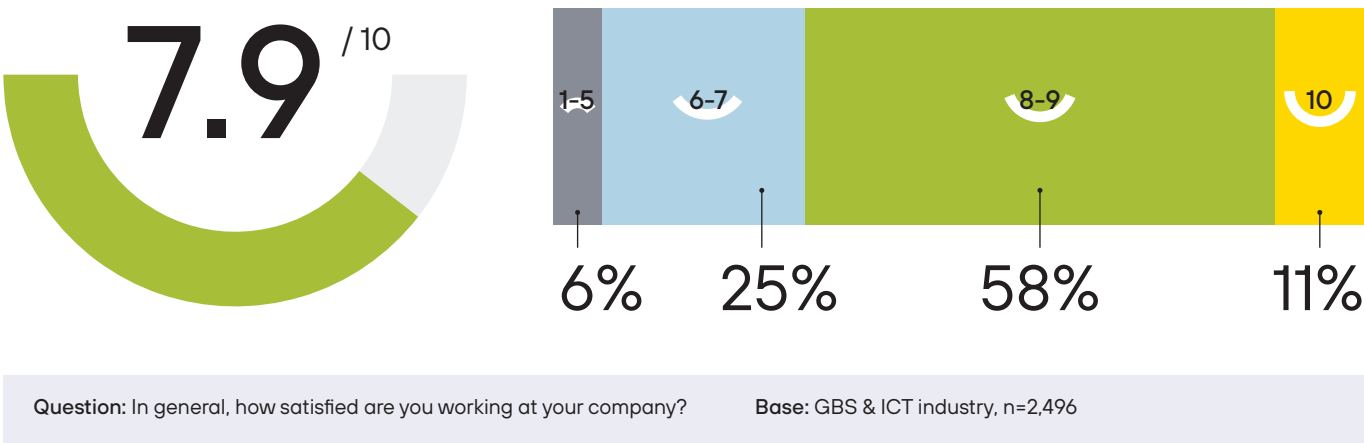
The number of employees as of 2020-11-18 (data provided by the State Social Insurance Fund Board) excluding those on a long-term leave (data provided by participating companies) was used as a reference basis.
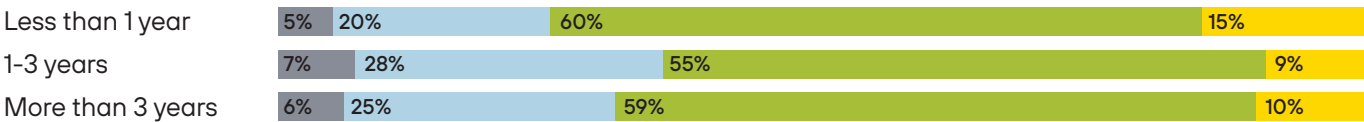
Satisfaction with employment

Almost 2 out of 3 employees reported that they felt very satisfied (score of 8 or above in a 10-point scale) with their employment in the GBS and ICT industry, while an overwhelming 94% reported that they felt satisfied overall (scores of 6 or above). This overall positive trend could be observed consistently throughout all demographic groups.

The highest job satisfaction rates were observed in employees over the age of 35, and within employees holding management and executive level position, with 97% and 96% respectively reporting that they felt satisfied with their employment. This indicates that experience, maturity and the complexity of the work performed has a positive impact on satisfaction levels.
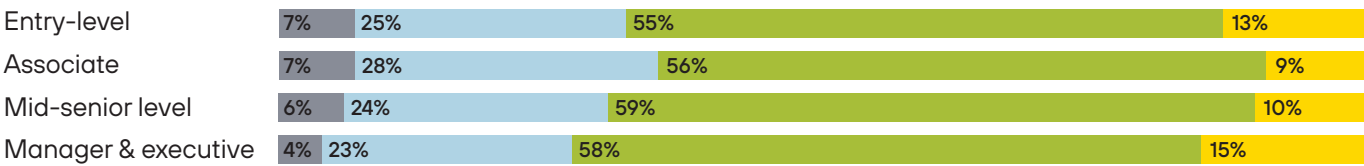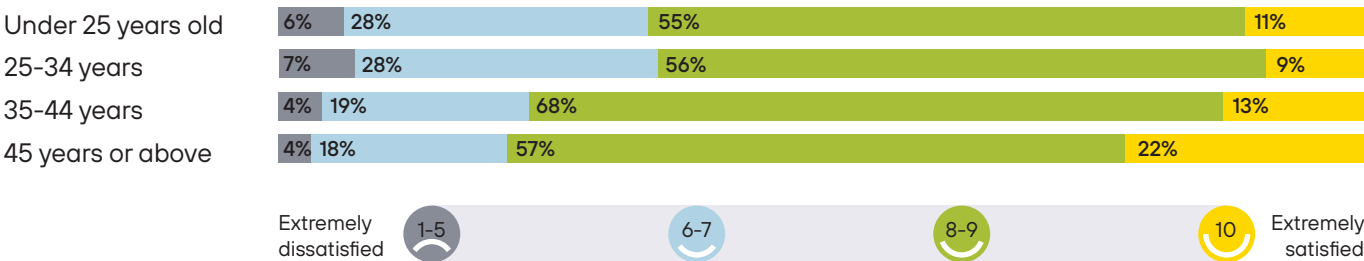
Overall satisfaction of the industry

7.9 / 10

1-5	6-7	8-9	10
6%	25%	58%	11%

Question: In general, how satisfied are you working at your company?   Base: GBS & ICT industry, n=2,496

Satisfation by duration of employment

	1-5	6-7	8-9	10
Less than 1 year	5%	20%	60%	15%
1-3 years	7%	28%	55%	9%
More than 3 years	6%	25%	59%	10%

Satisfaction by seniority level

	1-5	6-7	8-9	10
Entry-level	7%	25%	55%	13%
Associate	7%	28%	56%	9%
Mid-senior level	6%	24%	59%	10%
Manager & executive	4%	23%	58%	15%

Satisfaction by age

	1-5	6-7	8-9	10
Under 25 years old	6%	28%	55%	11%
25-34 years	7%	28%	56%	9%
35-44 years	4%	19%	68%	13%
45 years or above	4%	18%	57%	22%

Extremely dissatisfied · 1-5 · 6-7 · 8-9 · 10 · Extremely satisfied

Sources of information on employers and jobs

Social media, online job boards and personal recommendations were the leading sources of information utilized by GBS and ICT industry employees when searching for potential employment opportunities. 4 out of 5 employees reported looking for information about open positions / job offerings via social media, with LinkedIn ranking as the preferred site in the absolute majority of cases.
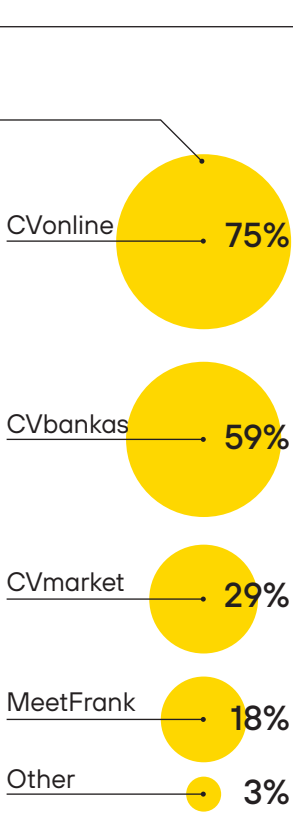
Although the majority of employees reported that they received information on potential employers via social media, more traditional means of application such as personal recommendations, job boards and recruiters were the top channels used when it came to applying for an actual position. This indicates that maintaining an active social media presence is a must for employer looking to optimize their visibility to potential employees, even though a larger portion of employees still prefer more traditional avenues of application.

The data also unsurprisingly shows that younger and more junior employees more often rely on digital platforms when it comes to applying for a job, while the importance of personal recommendation grew with an employees' age and experience in the field.

Means of finding information about employers and jobs

	employers	jobs
Social media	81%	10%
Job boards	61%	26%
Word-of-mouth & recommendation	51%	29%
From company recruitment representative / recruitment agency	32%	19%
Company career page	32%	12%
News websites	11%	0%
Events	9%	1%
Traditional media (TV, radio, newspaper)	4%	0%
Other channel	1%	1%

Finding information about: ■ employers ■ jobs

Job boards by popularity

CVonline	75%
CVbankas	59%
CVmarket	29%
MeetFrank	18%
Other	3%

Social media by popularity

LinkedIn	92%
Facebook	28%
Instagram	5%
Youtube	2%
Other	1%
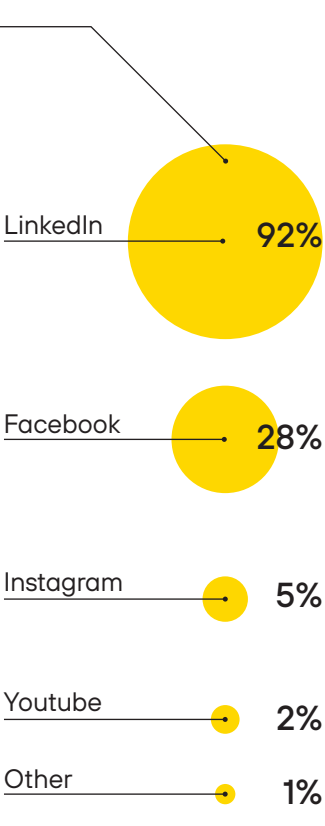
Question: Where do you most often get information about companies that you consider potential employers? (multiple choices)

Question: Where did you first hear about the open position in for which you applied?

Base: GBS & ICT industry, n=2,496

Question: On which job boards do you most often get information about potential employers?

Base: respondents, who get information on job boards, n=1,514

Question: On which social media platforms do you most often get information about potential employers?

Base: respondents, who get information on social media platforms, n=2,016

Criteria for choosing and evaluating employers

1 Salary, a trustworthy management which communicates effectively with its employees, a free and friendly atmosphere, and opportunities for career growth, were ranked by over 90% of survey participants as very or extremely important factors.

2 The opportunity to advance your career was ranked among the top 3 criteria for the under 25, and the 25–34-year-old age groups, while this factor gave way to effective communication with management and competitive salary for the over 35 age group. Younger employees placed special importance on career path, and the opportunity to advance in the company. This indicates that companies that pursue a multifunctional approach - in which a significant portion of senior and management roles can be considered aspirational - have a distinct advantage when it comes to attracting talent.
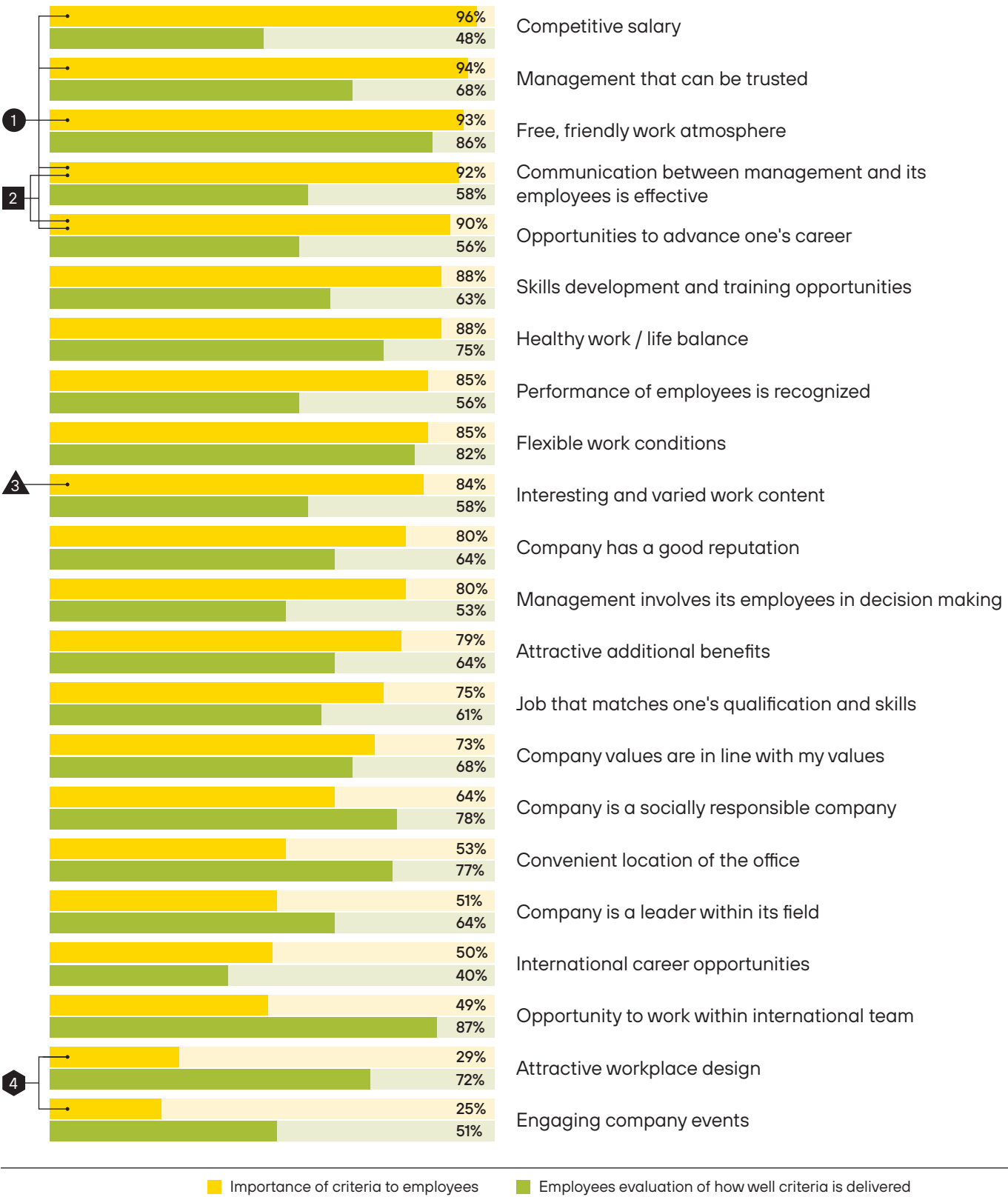
3 While these top factors remained relatively consistent among all seniority and tenure groups, it is of note that the importance of interesting and varied work content increased from 70% at entry level, to over 90% at management level. This implies that even though entry level employees are less selective when it comes to the depth and diversity of the tasks they perform at the start of their job, this becomes a crucial factor in respect in keeping them in that job (their retention level) later on in their career.

4 Workplace design and engaging events ranked at the bottom for all groups. This would appear to suggest that employees view these as "hygiene" factors or something that is expected by all employers rather than major elements to boost employer attractiveness.

As part of the survey, employees were also asked to rate the extent to which the criteria for choosing an employer could be applied to their workplace. From the findings it becomes clear that there is equivalence in some categories between what employees expect and what they receive, but also much in the way of convergence too - in some criteria employers overperform by almost 30%, whilst in others an underperformance of almost 50% can be seen. This would indicate that, although the local GBS & ICT sector is in many areas meeting employee expectations, there are other areas where companies could work to achieve a closer parity with the expectations of employees. By doing so, they would enhance their existing value proposition, and be better positioned to retain existing talent as well as attract new talent.

Comparison of which criteria are most important & the extent to which they are met by employers

Criteria	Importance	Delivery
Competitive salary	96%	48%
Management that can be trusted	94%	68%
Free, friendly work atmosphere	93%	86%
Communication between management and its employees is effective	92%	58%
Opportunities to advance one's career	90%	56%
Skills development and training opportunities	88%	63%
Healthy work / life balance	88%	75%
Performance of employees is recognized	85%	56%
Flexible work conditions	85%	82%
Interesting and varied work content	84%	58%
Company has a good reputation	80%	64%
Management involves its employees in decision making	80%	53%
Attractive additional benefits	79%	64%
Job that matches one's qualification and skills	75%	61%
Company values are in line with my values	73%	68%
Company is a socially responsible company	64%	78%
Convenient location of the office	53%	77%
Company is a leader within its field	51%	64%
International career opportunities	50%	40%
Opportunity to work within international team	49%	87%
Attractive workplace design	29%	72%
Engaging company events	25%	51%

■ Importance of criteria to employees   ■ Employees evaluation of how well criteria is delivered

Question: How important for you are the following criteria when choosing an employer? (shown only top 2 answers ("extremely important" and "very important"))

Question: In your opinion, how well do the following characteristics describe your company? (shown only top 2 answers ("extremely well" and "very well"))

Base: GBS & ICT industry, n=2,496

Deep dive
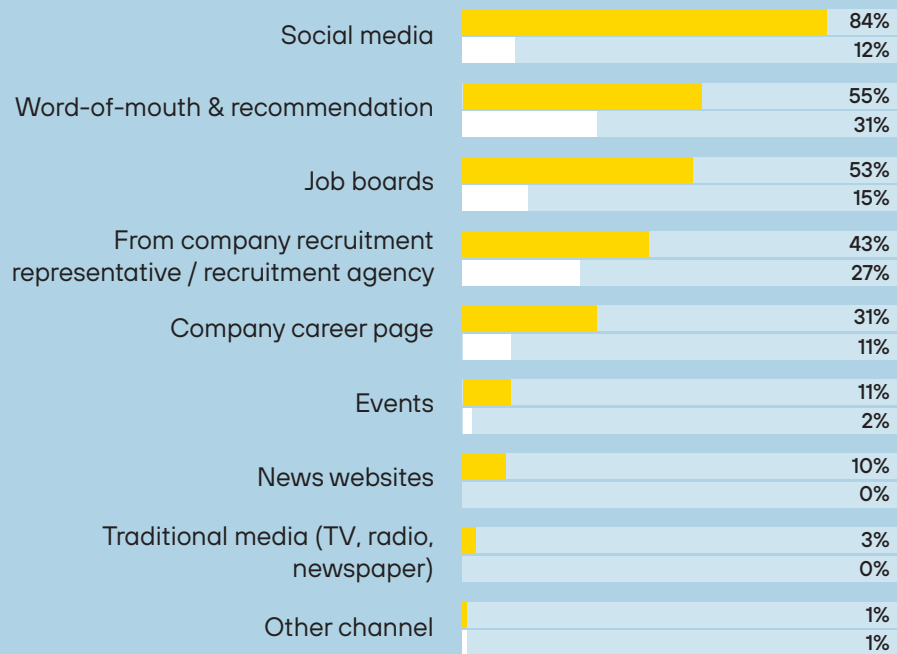## Software developers and other tech specialists

Software developers and technology specialists reported the highest employment satisfaction rates among the three major employment areas.

8.1 /10

Developers and tech specialists were the group most likely to look for information on employers on social media, but one of the least likely to apply through this channel. Personal recommendation and recruiters were the top channels via which these specialists ended up applying for positions.

Means of finding information about employers and jobs

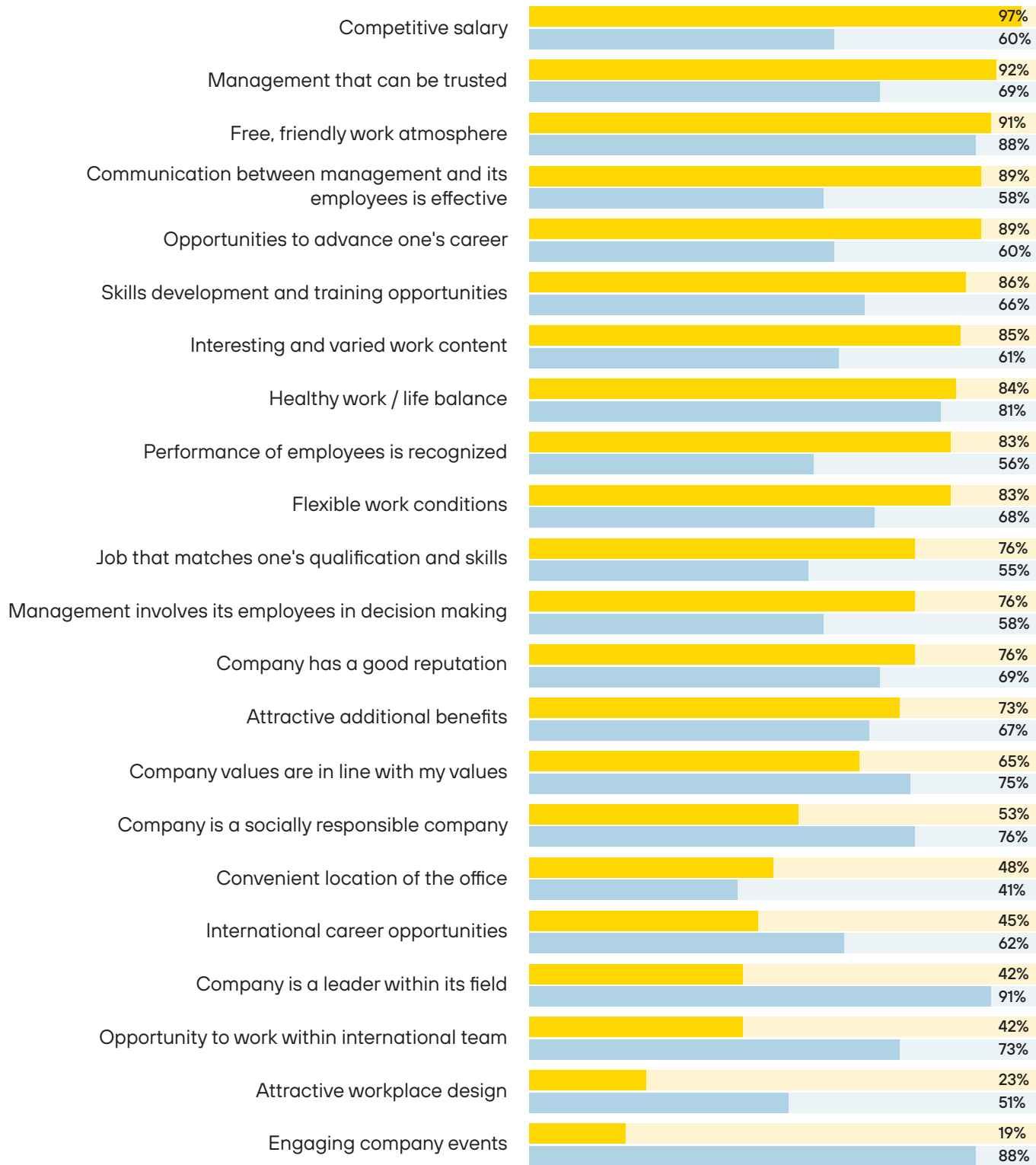|	employers	jobs
Social media	84%	12%
Word-of-mouth & recommendation	55%	31%
Job boards	53%	15%
From company recruitment representative / recruitment agency	43%	27%
Company career page	31%	11%
Events	11%	2%
News websites	10%	0%
Traditional media (TV, radio, newspaper)	3%	0%
Other channel	1%	1%

Finding information about ■ employers ■ jobs

Competitive salary remains at the top of the list of employer attractiveness factors, and 60% of the group reported that their employer fulfilled this criterion – the highest share among all groups (17% and 24% higher result compared to the two other major groups). Software developers also placed more importance on factors like whether the position matched their qualifications, and opportunities on offer for skill development and training.

Comparison of which criteria are most important & the extent to which they are met by employers

	Importance	Delivery
Competitive salary	97%	60%
Management that can be trusted	92%	69%
Free, friendly work atmosphere	91%	88%
Communication between management and its employees is effective	89%	58%
Opportunities to advance one's career	89%	60%
Skills development and training opportunities	86%	66%
Interesting and varied work content	85%	61%
Healthy work / life balance	84%	81%
Performance of employees is recognized	83%	56%
Flexible work conditions	83%	68%
Job that matches one's qualification and skills	76%	55%
Management involves its employees in decision making	76%	58%
Company has a good reputation	76%	69%
Attractive additional benefits	73%	67%
Company values are in line with my values	65%	75%
Company is a socially responsible company	53%	76%
Convenient location of the office	48%	41%
International career opportunities	45%	62%
Company is a leader within its field	42%	91%
Opportunity to work within international team	42%	73%
Attractive workplace design	23%	51%
Engaging company events	19%	88%

■ Importance of criteria to employees ■ Employees evaluation of how well criteria is delivered
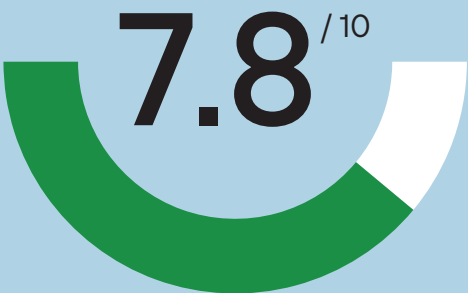
Deep dive
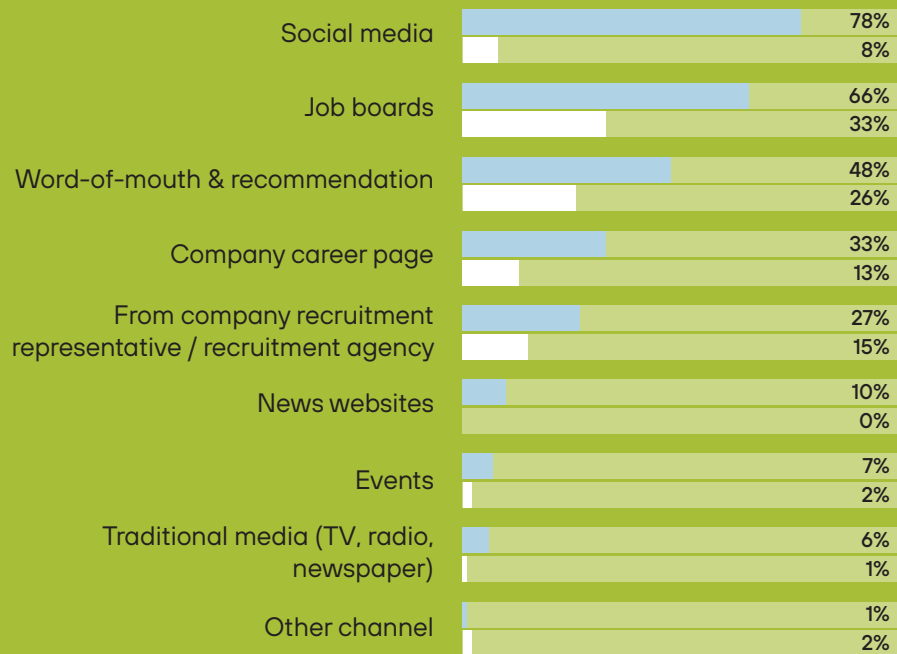## Finance, accounting and compliance specialists

Specialists working in the areas of finance, accounting and compliance areas reported employment satisfaction rates that were broadly in line with those of the overall industry.

7.8 /10

Although social media was also the leading source of information for the groups of financial specialists interviewed, job boards came a close second, and they were observably more important for finance specialists than for tech specialists. This is also the channel that the largest proportion of employees in this group ended up applying through.

Means of finding information about employers and jobs

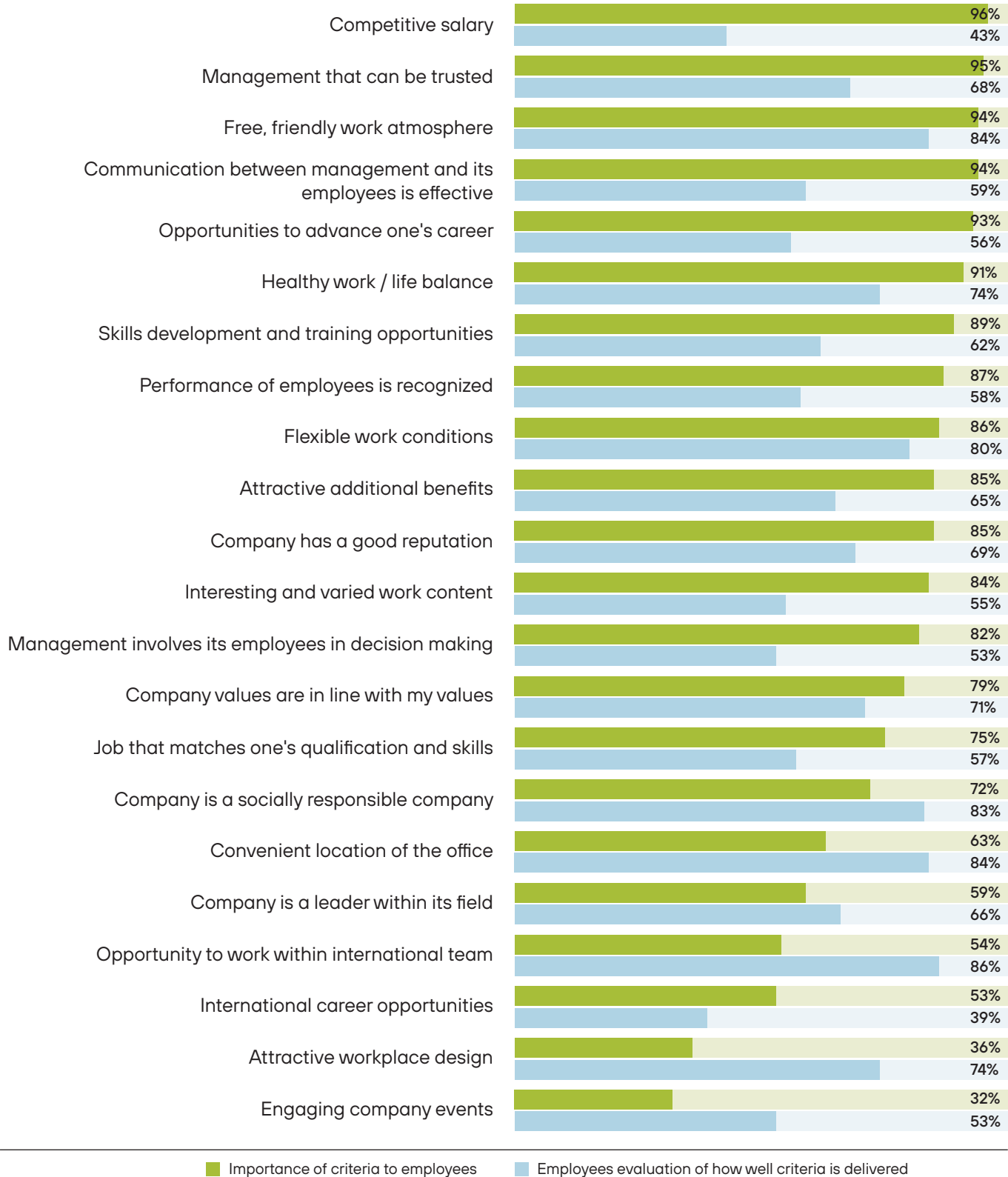|	employers	jobs
Social media	78%	8%
Job boards	66%	33%
Word-of-mouth & recommendation	48%	26%
Company career page	33%	13%
From company recruitment representative / recruitment agency	27%	15%
News websites	10%	0%
Events	7%	2%
Traditional media (TV, radio, newspaper)	6%	1%
Other channel	1%	2%

Finding information about ■ employers ■ jobs

Finance, accounting and compliance specialists selected the same top 5 criteria as IT specialists, confirming that despite their different areas of work, they share the same expectations, which are a the need for competitive salary and career opportunities, effective communication between trusted management employees, and a friendly atmosphere.

Comparison of which criteria are most important & the extent to which they are met by employers

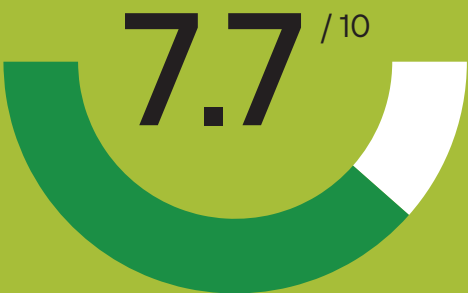| Criteria	Importance	Evaluation
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Management that can be trusted	95%	68%
Free, friendly work atmosphere	94%	84%
Communication between management and its employees is effective	94%	59%
Opportunities to advance one's career	93%	56%
Healthy work / life balance	91%	74%
Skills development and training opportunities	89%	62%
Performance of employees is recognized	87%	58%
Flexible work conditions	86%	80%
Attractive additional benefits	85%	65%
Company has a good reputation	85%	69%
Interesting and varied work content	84%	55%
Management involves its employees in decision making	82%	53%
Company values are in line with my values	79%	71%
Job that matches one's qualification and skills	75%	57%
Company is a socially responsible company	72%	83%
Convenient location of the office	63%	84%
Company is a leader within its field	59%	66%
Opportunity to work within international team	54%	86%
International career opportunities	53%	39%
Attractive workplace design	36%	74%
Engaging company events	32%	53%

■ Importance of criteria to employees ■ Employees evaluation of how well criteria is delivered

Deep dive
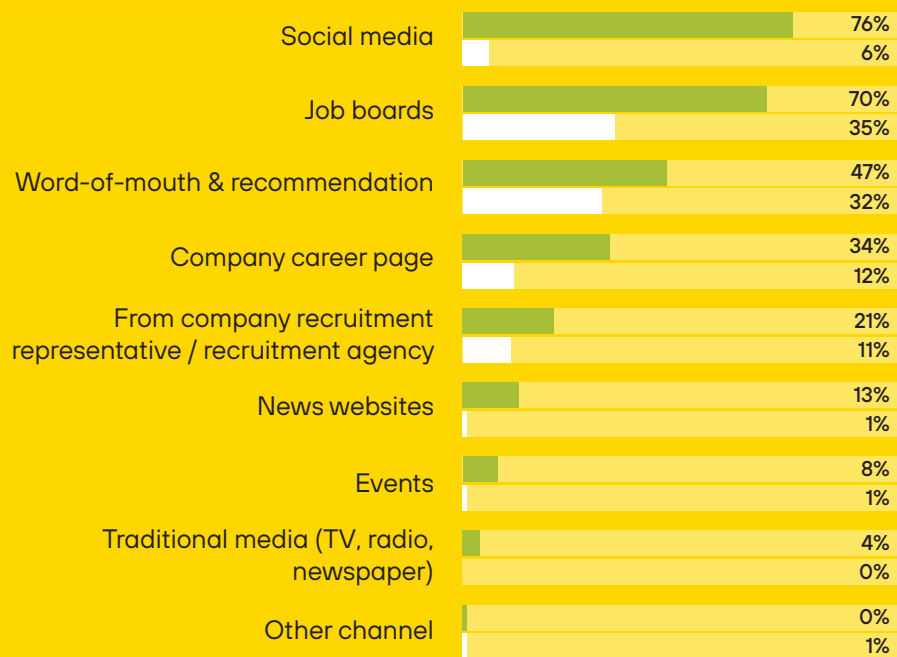## Customer care and operations specialists

Customer care specialists reported lower employment satisfaction rates compared to the other major groups, although this was not far from industry average.

7.7 / 10

As was the case for specialists in the financial field, specialists in the customer care field found most of their information about potential employers on social media and job boards, with job boards and personal recommendations acting as the means through which 2/3 of all applicants applied for their positions.

Means of finding information about employers and jobs

	employers	jobs
Social media	76%	6%
Job boards	70%	35%
Word-of-mouth & recommendation	47%	32%
Company career page	34%	12%
From company recruitment representative / recruitment agency	21%	11%
News websites	13%	1%
Events	8%	1%
Traditional media (TV, radio, newspaper)	4%	0%
Other channel	0%	1%

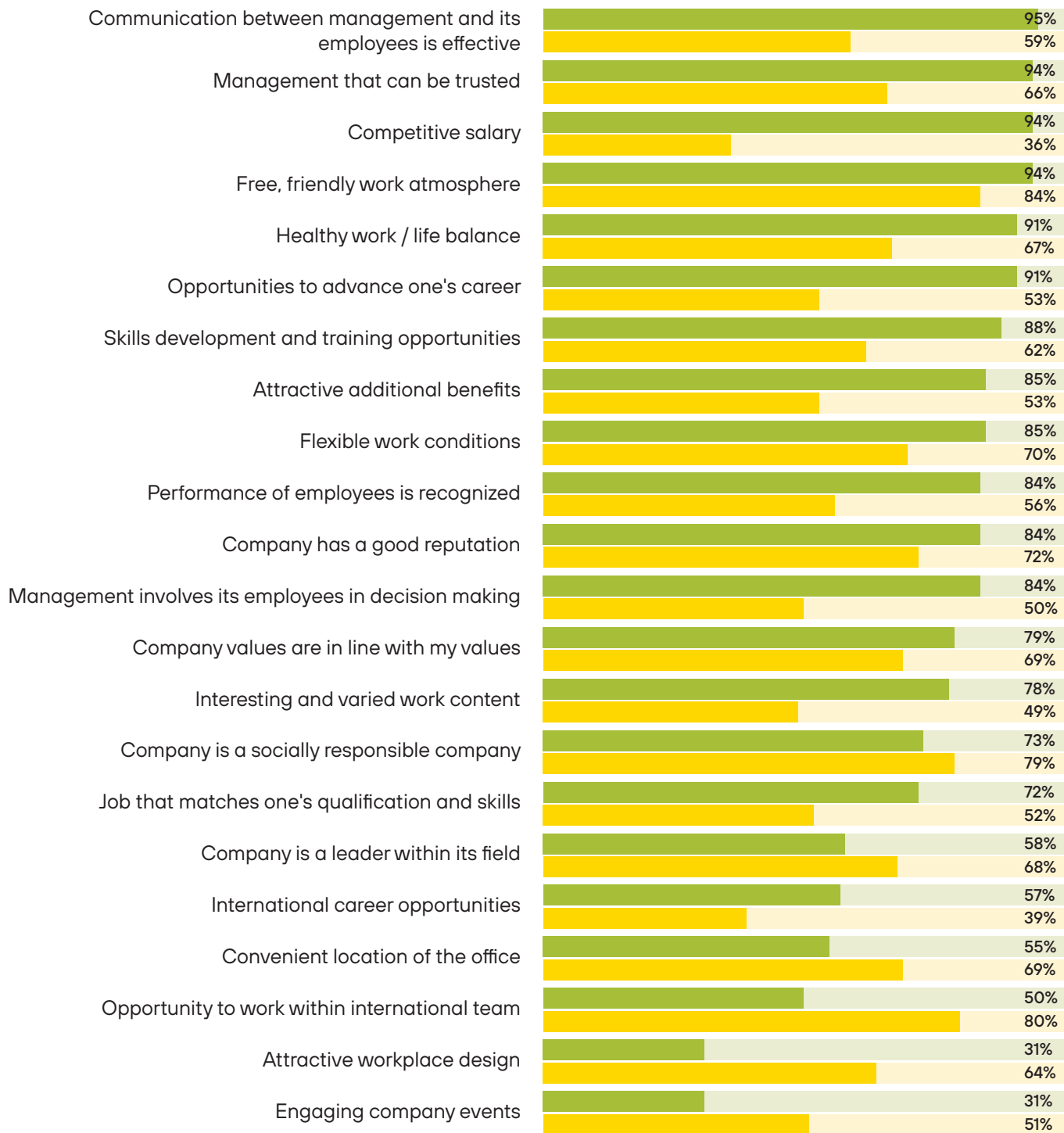Finding information about ▪ employers ▫ jobs

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Again, it can be seen that the criteria of importance selected by customer operations specialists is roughly in line with those selected by the whole industry, with only minor shifts noticeable in the order of the criteria. The main difference here is that this group places more importance on the social responsibility aspect of the company, with 73% of the group saying it is very or extremely important for them. There are also differences in the evaluation of the fulfillment of the criteria. In contrast to IT specialists, customer care and operations professionals report the lowest fulfillment of the competitive salary criteria (36%).

Comparison of which criteria are most important & the extent to which they are met by employers

Criteria	Importance	Evaluation
Communication between management and its employees is effective	95%	59%
Management that can be trusted	94%	66%
Competitive salary	94%	36%
Free, friendly work atmosphere	94%	84%
Healthy work / life balance	91%	67%
Opportunities to advance one's career	91%	53%
Skills development and training opportunities	88%	62%
Attractive additional benefits	85%	53%
Flexible work conditions	85%	70%
Performance of employees is recognized	84%	56%
Company has a good reputation	84%	72%
Management involves its employees in decision making	84%	50%
Company values are in line with my values	79%	69%
Interesting and varied work content	78%	49%
Company is a socially responsible company	73%	79%
Job that matches one's qualification and skills	72%	52%
Company is a leader within its field	58%	68%
International career opportunities	57%	39%
Convenient location of the office	55%	69%
Opportunity to work within international team	50%	80%
Attractive workplace design	31%	64%
Engaging company events	31%	51%

▪ Importance of criteria to employees ▪ Employees evaluation of how well criteria is delivered

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