

Invest  
Lithuania

Lithuania  
Co-create

# Lithuania's business services report



2025

# Companies that have chosen Lithuania for GBS & ICT

## Information Technology and Communications















## Other Industries







Knowledge grows

## Financial Services







## Manufacturing, Engineering and Transportation













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## Notable facts about Lithuania's GBS & ICT Sector in 2025

**100**

Number of investor companies with GBS centers



**27<sup>K</sup>**

Number of employees in GBS centers



**16%**

Average voluntary attrition rate in GBS centers



**5.8%**

Average wage growth in GBS centers



**36%**

Share of employees working in Tech related fields in GBS centers



**50%**

Share of processes automated at advanced or higher levels of automation



## Invest Lithuania

Our Foreign Direct Investment (FDI) agency, which operates under the Ministry of Economy and Innovation, is dedicated to helping businesses establish and expand their operations in Lithuania by providing expert guidance, strategic insights, and ongoing support.

### Long-term partnership

Invest Lithuania is eager to have long-lasting business relationships with multinational companies that decide to establish themselves in Lithuania.

From initial help with business set-up to personalized consultative assistance when the organization needs it – Invest Lithuania will be there with you.

### Wide range of business support tools

We will share our expertise on the local market environment, talent pool, financial incentives, and will connect you with relevant stakeholders in the country.

We will provide you with insights from other companies and regions around the globe, as we are willing to go the extra mile for your success.

**Invest Lithuania**

[investlithuania.com](https://investlithuania.com)

### IPA with a proven track record

We have helped over 350 international companies to open in Lithuania, who now employ over 40 000 talents in the country.

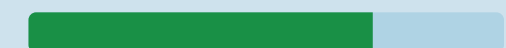
These figures are just one of a few reasons why Invest Lithuania has been named among the best IPAs in Europe numerous times – an achievement which would not have happened without great clients.

### About the survey

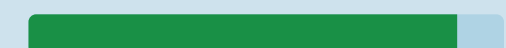
The data was collected between February and March of 2025 by Invest Lithuania.

72 companies employing over 24,000 professionals participated in the survey, which accounts for 72% of all GBS & ICT centers in the industry and 89% of its total labor force.

**72%** of all GBS & ICT centers in the industry



**89%** Of the total labor force in the industry





# Foreword

The GBS sector, alongside ICT, has been the foundation of Lithuania's in attracting foreign investment. Our first "flagship investors" emerged in this sector, establishing it as a key pillar in our investment landscape. This sector embodies our success stories and demonstrates Lithuania's powerful promise – we consistently deliver beyond expectations, a claim validated by the sector's continued growth.

Our nation's reputation has become defined by our ability to fulfill commitments, evidenced by companies expanding beyond their initial investment projections. Lithuania's GBS sector stands out qualitatively among regional competitors, while our ICT sector growth ranks among the fastest. We're clearly on the right path – with our skilled specialists consistently mentioned by investors as a key reason for choosing Lithuania: a workforce that remains hungry and ambitious, yet no longer merely inexpensive.

What are we doing to enable centers to grow here? Everything begins with how investors view their Lithuanian operations – whether they're profitable and solve strategic challenges. When these conditions are met, interest in expansion naturally follows. We then provide tactical assistance, working closely with our education sector to prepare specialists meeting investor needs and implementing initiatives guiding students toward relevant careers. For accelerated growth or highly specialized competencies, we facilitate the attraction of highly-qualified foreign talent through relocation-friendly measures.

We work to foster closer relationships between investors and universities, ensuring alignment between industry needs and the skills taught in

## Lithuania's GBS success – delivering beyond expectations

higher education. This bridge-building is a valuable part of our comprehensive offering to investors. Equally important is the aftercare work performed by Invest Lithuania, maintaining ongoing relationships with established companies and providing vital feedback to ministry and government officials on areas for improvement. We recognize that competitiveness is not a given – it requires vigilance and adaptation. By listening attentively to investor experiences and adjusting our regulatory landscape accordingly, we strive to maintain Lithuania's competitive edge.

The global GBS landscape is evolving. Large centers remain possible but are no longer based solely on cost savings. While job numbers may remain substantial, quality standards have become exceptionally important. Our GBS success stories serve as our most compelling evidence when speaking with potential investors, who can hear directly from companies with decade-long Lithuanian operations. Their unfiltered feedback consistently confirms our value proposition.

**Lukas Savickas**

Minister of Economy and Innovation



# Executive Summary

## From efficiency to global leadership: A maturing GBS landscape

Since its inception and rapid ascent, Lithuania's GBS sector has seen a remarkable transformation, shifting from transactional cost saving operations to centers of excellence delivering high-value services. This journey is increasingly recognized internationally, with Lithuanian GBS centers stacking their shelves with multiple accolades from regional and global awards.

The sector has seen a marked increase in companies focusing on advanced roles from day one of operations. Companies like Johnson Matthey are establishing centers focused on IT transformation and specialized functions rather than following the traditional pattern of testing basic operations before expanding. This shows growing international confidence in Lithuania's capabilities for sophisticated, high-added value operations.

Technology remains central to the sector, with 83% of new GBS projects in 2024 either run by tech companies or featuring strong tech functionality. Unlike pure product development hubs, centers based in Lithuania often specialize in high-value business services including fund management, AML, data science, and supply chain management.

Despite some transactional roles migrating to other markets, Lithuania has retained and is continuing to grow its advanced functions. The exceptional combination of quality, efficiency, and low attrition explains this sustained commitment.

Geographic diversification continues with increasing interest from the United States, particularly Silicon Valley companies. The APAC region is emerging as a target market, exemplified by Japan's NTT DATA establishing operations in Lithuania after positive previous experiences working with Lithuanian professionals.

The Vilnius-Kaunas hub continues to offer complementary strengths: Vilnius provides a diverse, multifunctional environment while Kaunas develops specialized expertise connected to its STEM education network.

While senior specialists in Lithuania at times command European-level compensation, mid-level positions continue to offer cost advantages compared to Western Europe, Scandinavia, and North America. Interestingly, Lithuanian professionals at mid-level roles often take on responsibility typical of senior roles elsewhere, providing additional value beyond what salary comparisons might suggest.

Looking ahead, Lithuania's GBS sector is well-positioned for continued evolution. As automation and AI reshape operational roles, the country's focus on advanced capabilities, innovation, and specialized expertise creates resilience.

**Rūta Kriščiūnaitė**

Head of GBS & ICT Team  
at Invest Lithuania



# GBS & ICT Sector Evolution

Over the past decade, Lithuania has cultivated remarkably strong GBS and ICT sectors, evident in their impressive workforce growth – 27,000 employees in GBS and over 60,000 in ICT. Together with our startup ecosystem, now valued at \$16 billion and home to globally renowned unicorns, these achievements demonstrate our maturity and ability to meet the needs of the most advanced companies globally.

We have now reached a pivotal transformation point. While we can still offer competitive costs, our value proposition has evolved significantly. Lithuania's business service capabilities now match the quality and sophistication of Europe's major business hubs. This represents a qualitative leap – evolving from being merely cost-competitive to offering exceptional quality and sophisticated functions.

From the perspective of the Ministry of Economy and Innovation, we're dedicating substantial attention to supporting this transformation. Our priorities include attracting talent with in-demand skills and fostering a robust high-tech innovation ecosystem. We're creating an exceptionally attractive business environment through targeted financial incentives, comprehensive R&D support, and regulatory advantages such as our new AI sandbox that allows companies to test and implement advanced solutions with minimal barriers. Simultaneously, we're actively reducing administrative burdens across the board –

## Lithuania's evolution from cost advantage to quality leadership

all institutions under the Ministry of Economy and Innovation that work with businesses have been tasked with cutting administrative requirements by 30%.

Competition for business services investments is fierce, with some countries offering lower costs. However, Lithuania's core value proposition lies in our speed and flexibility, government attention to investment climate, and sector maturity.

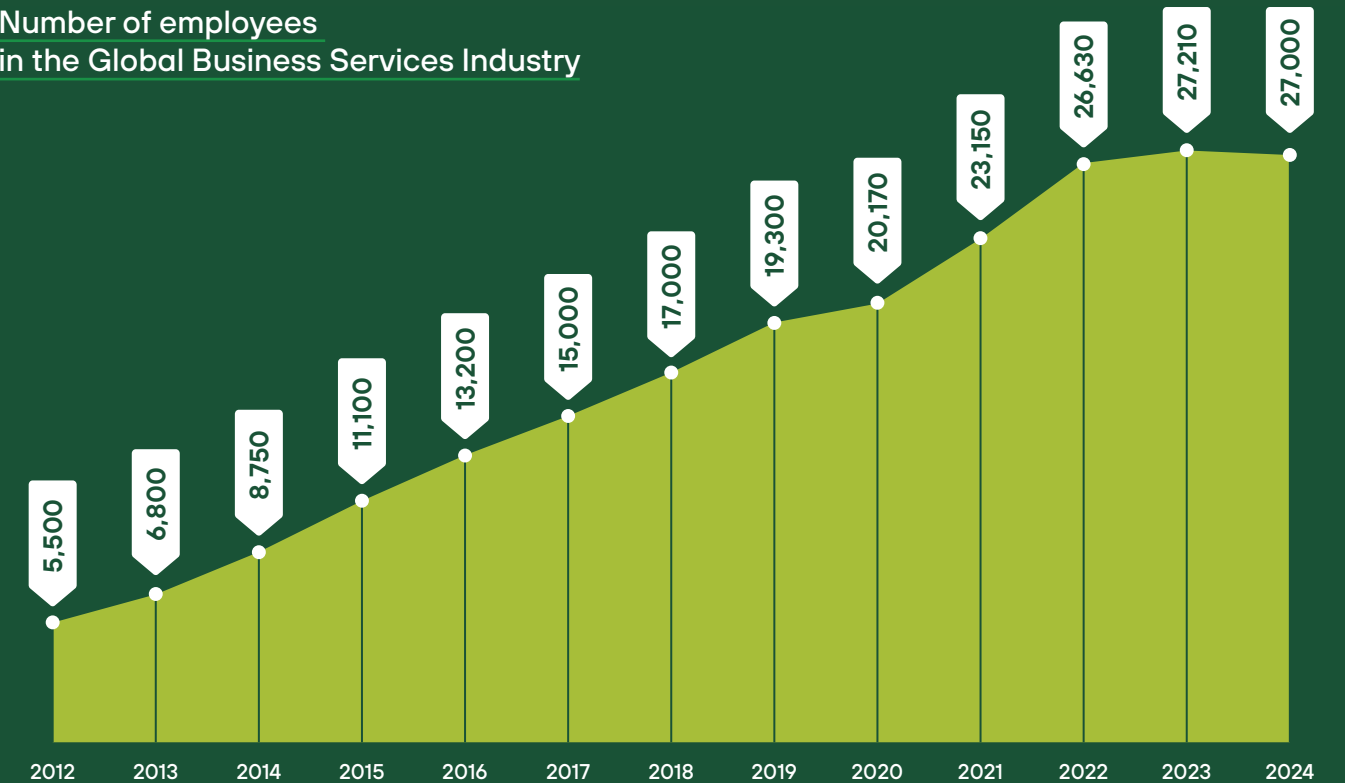
We don't aim to attract all types of business service centers – our focus is on those seeking quality outcomes and high-value functions rather than routine operations. Lithuania offers a mature, capable yet unsaturated business services cluster, making us an ideal choice for companies looking to consolidate functions in fewer locations. Here, businesses can establish comprehensive centers with multiple complex functions in one highly competitive place.

**Marius Stasiukaitis**

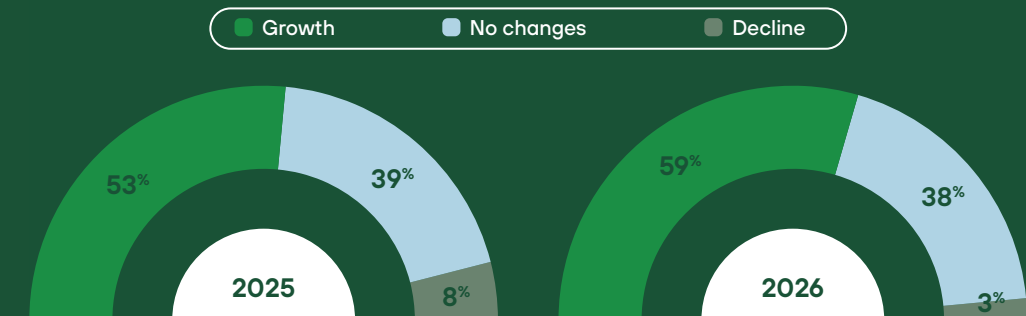
Vice-Minister  
of Economy and Innovation



## Number of employees in the Global Business Services Industry



## Company growth plans in Lithuania



## Major contributors for growth

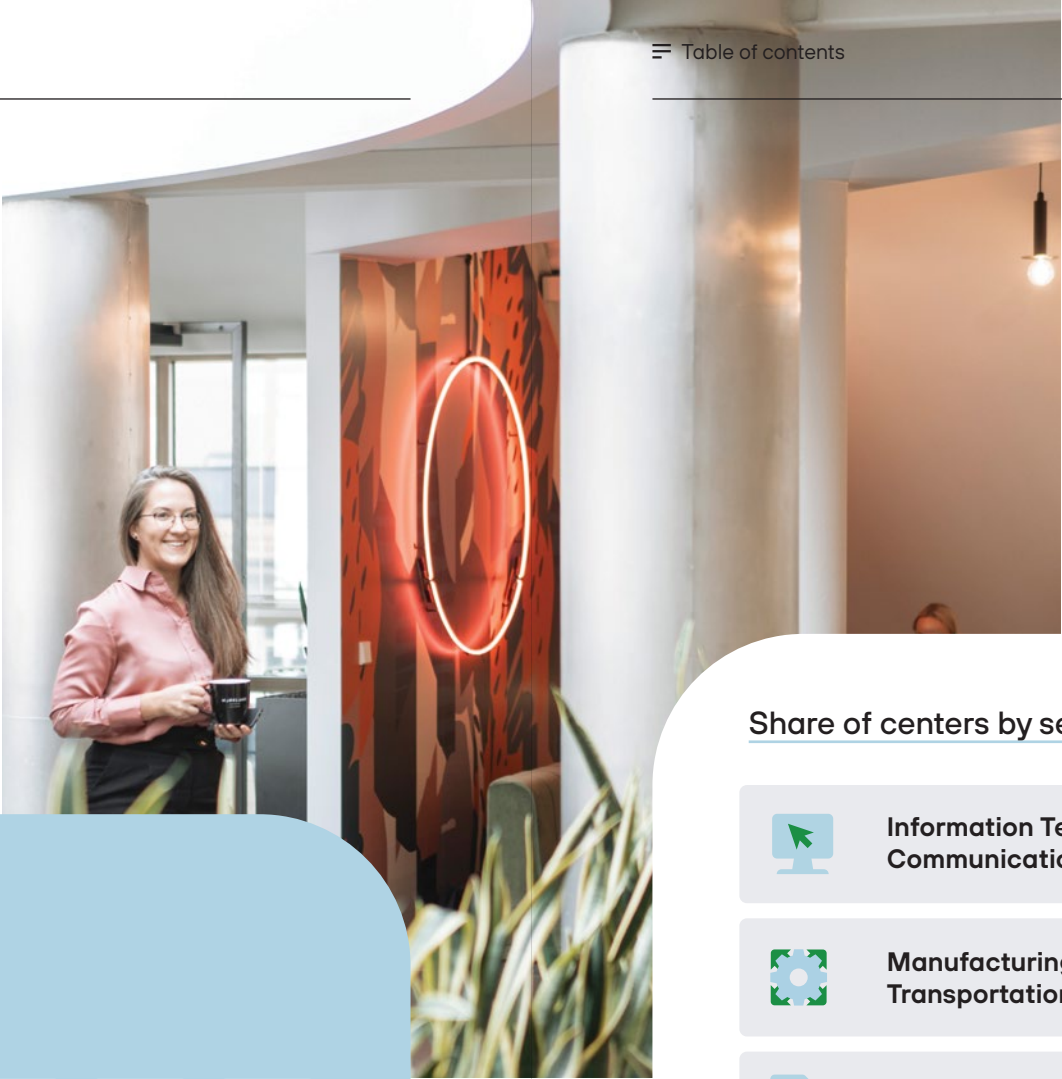




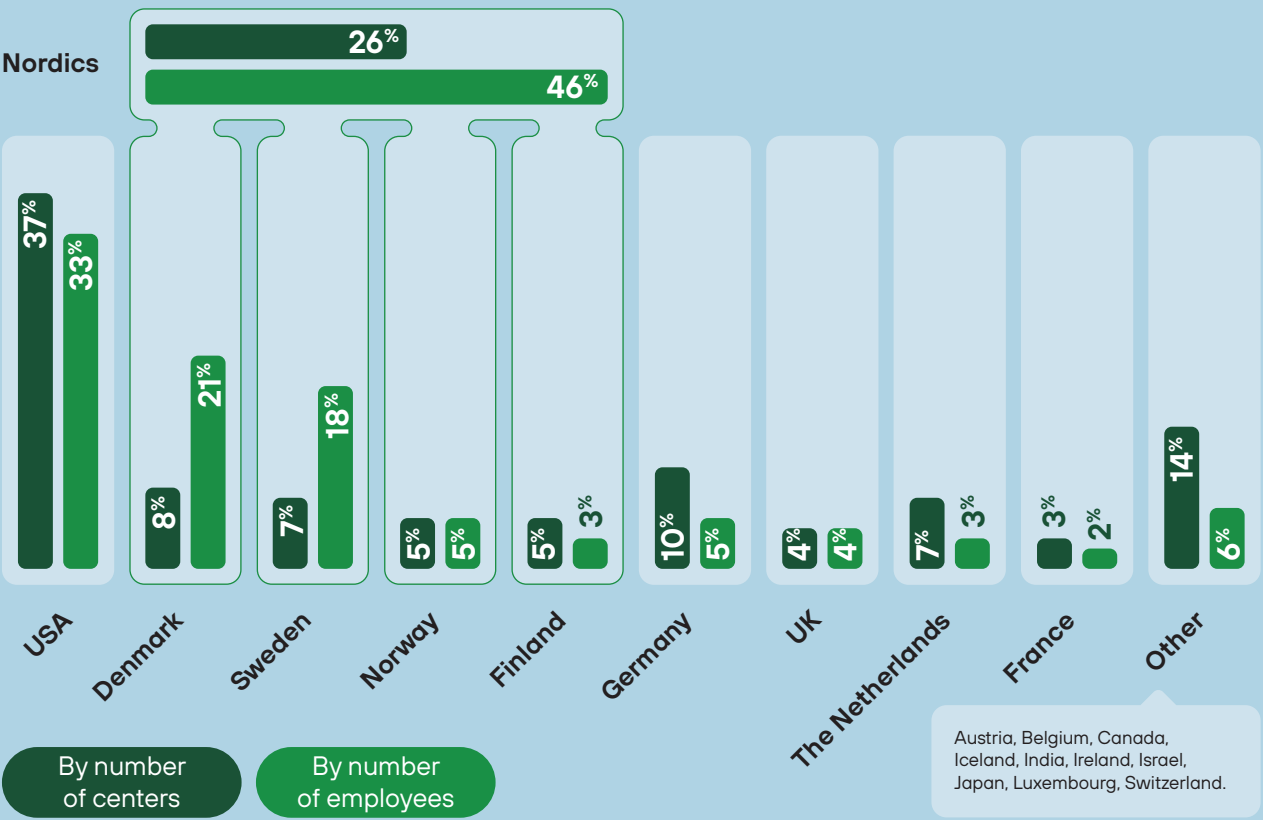
# Sector Overview

## By HQ location

The global GBS & ICT sector has experienced several shifts during the last year, with many companies reducing staff and emphasizing nearshoring for their operations. Some noticeable changes happened in Lithuania as well – while the US remains our top investor, other countries have increased their share in the industry, since we’ve had 4 newcomer companies come to Lithuania. Datagroup, Ovivo, Swisslog, and Vishay Intertechnology have established their business services offices in Lithuania, which in turn has increased the number of Captive centers in the industry. This again showcases Lithuania’s value proposition – even during global disturbances, companies are able to expand their operations in our GBS & ICT ecosystem.



Share of centers by HQ location in 2025



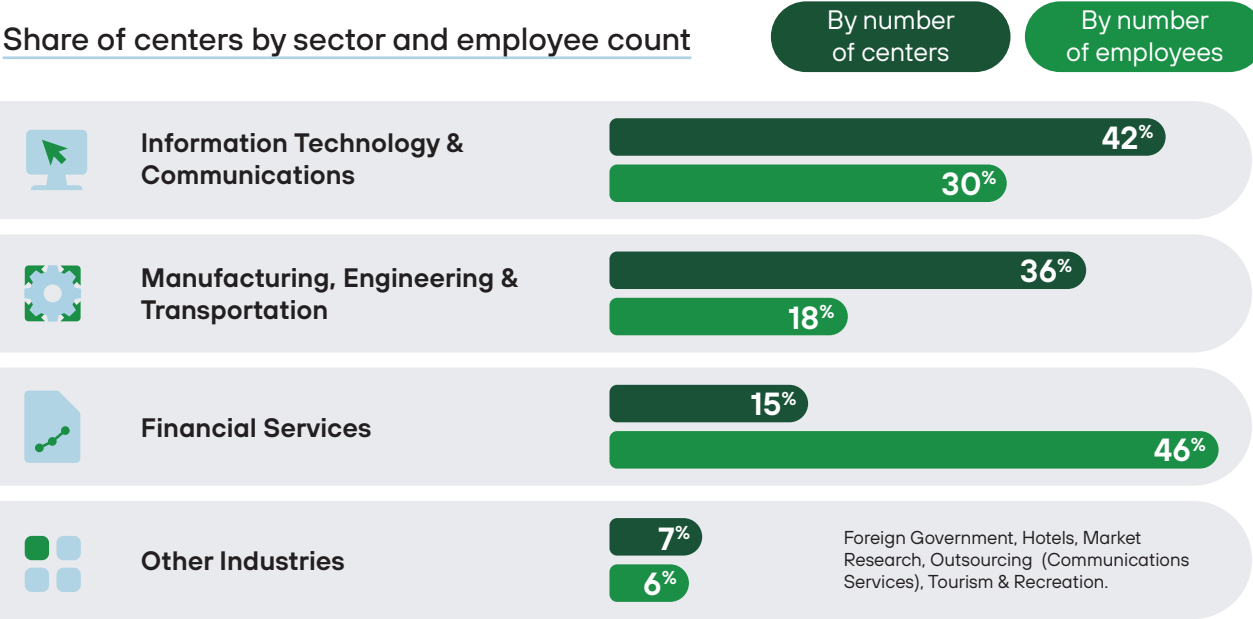
Business Services centers by type in 2025



## By primary sector

Manufacturing, Engineering & Transportation sector companies experienced the largest growth in their presence in Lithuania last year, with both the number of centers and number of employees representing this sector increasing. Underpinning this growth is the broader variety of roles available to the talent pool, as well as the large investments that some firms are making in automation, which is driving the creation of more high-value functions. Similar trends are also expected in the future, as momentum towards the shift towards digitalization of services and processes gathers pace.

Share of centers by sector and employee count



Business Services centers established across Lithuania



# Expertise Areas of Lithuania's Talent Pool

Following global trends, Lithuania's GBS landscape has evolved rapidly, with centers becoming versatile hubs and centers of excellence. Companies gain significant advantages by increasing functional complexity and fully leveraging Lithuania's potential. Over the years, Lithuania has reached sufficient maturity to serve as the primary engine in a company's GBS strategy, enabling the Advanced GBS model and leading digital transformation initiatives. This maturity creates a powerful environment where both companies and professionals can thrive.

The depth of expertise available in Lithuania creates natural opportunities for meaningful work and professional growth. The market offers a robust supply of senior specialists, seasoned leaders, and competent managers who seek challenging work, additional responsibilities, and projects they can fully own. Organizations that leverage Lithuania's full potential can offer these growth conditions to both new hires and existing colleagues.

These strategic advantages are evident in several success stories. Cencora, a leading global pharmaceutical solutions provider that entered Lithuania in 2017, demonstrates this trajectory perfectly. What started as a 10-person operation focused on Shipping Management over a few years expanded to cover a wide range of functions - 28 in total - including full-scale IT development and Finance operations, RPA, Cloud operations, Data science, and Business intelligence. Today, this rich portfolio even includes a dedicated Cybersecurity team, playing a critical role in safeguarding global operations. By embracing Lithuania's full capabilities, Cencora

## How talent empowerment drives business value on a global scale

optimized their global operations while creating an environment where top talent can thrive.

Johnson Matthey's experience further validates Lithuania's strategic importance. This global leader in sustainable technologies made their Lithuanian center a core driver for the organization's business services strategy. Despite being relatively unknown in the local market initially, their commitment to a multifunctional approach and creating global-level roles from the start enabled rapid growth, culminating in their announcement to double their headcount by the end of 2025.

As Lithuania's business services sector continues to mature, the trend toward an Advanced GBS model provides a winning formula for global organizations. Companies that recognize and harness Lithuania's full potential as a driver of digital transformation and business excellence position themselves for sustainable competitive advantage in the global marketplace.

**Milda Miliūnė**

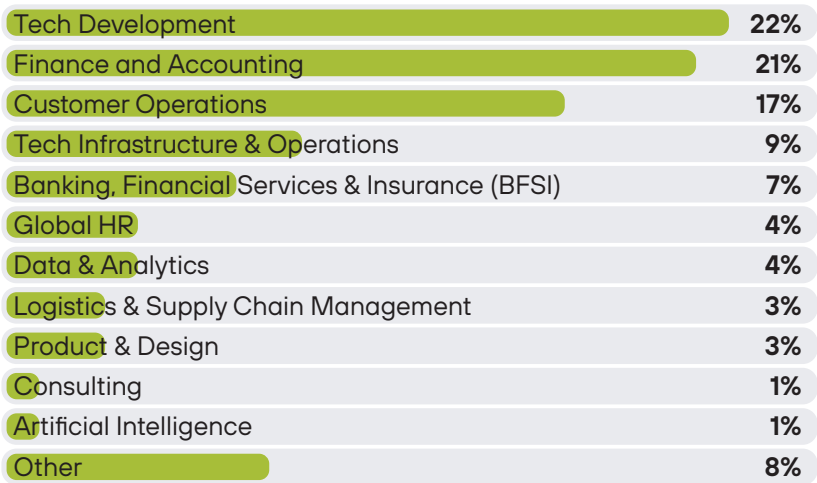
former Product Strategist  
for GBS & ICT at Invest Lithuania



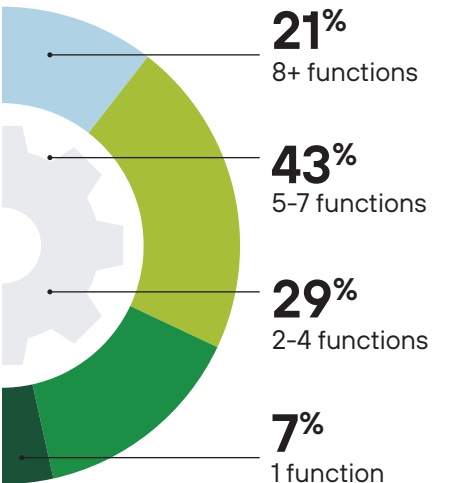


# Functions performed in Lithuania's GBS & ICT sector

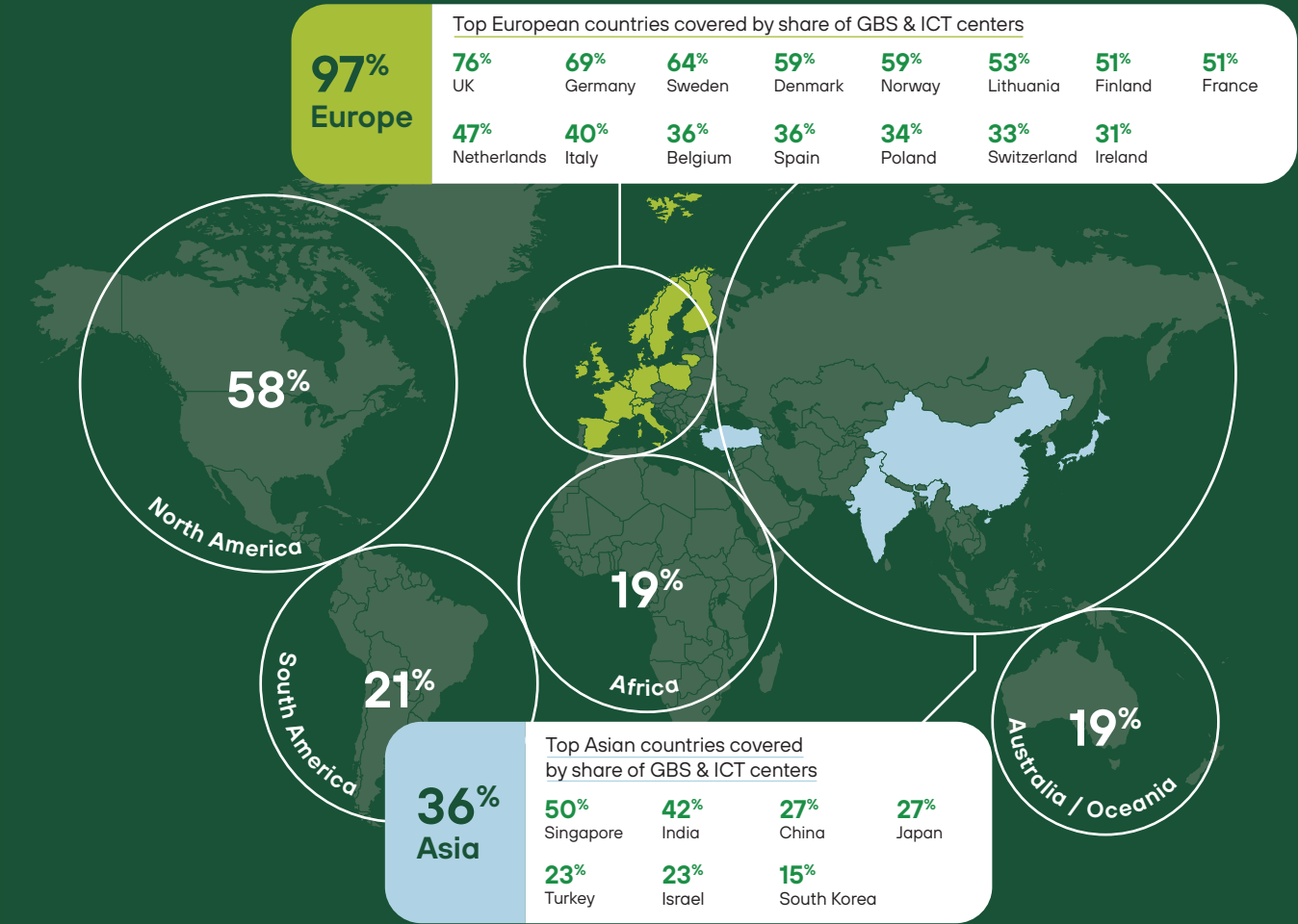
Employee distribution across various functions



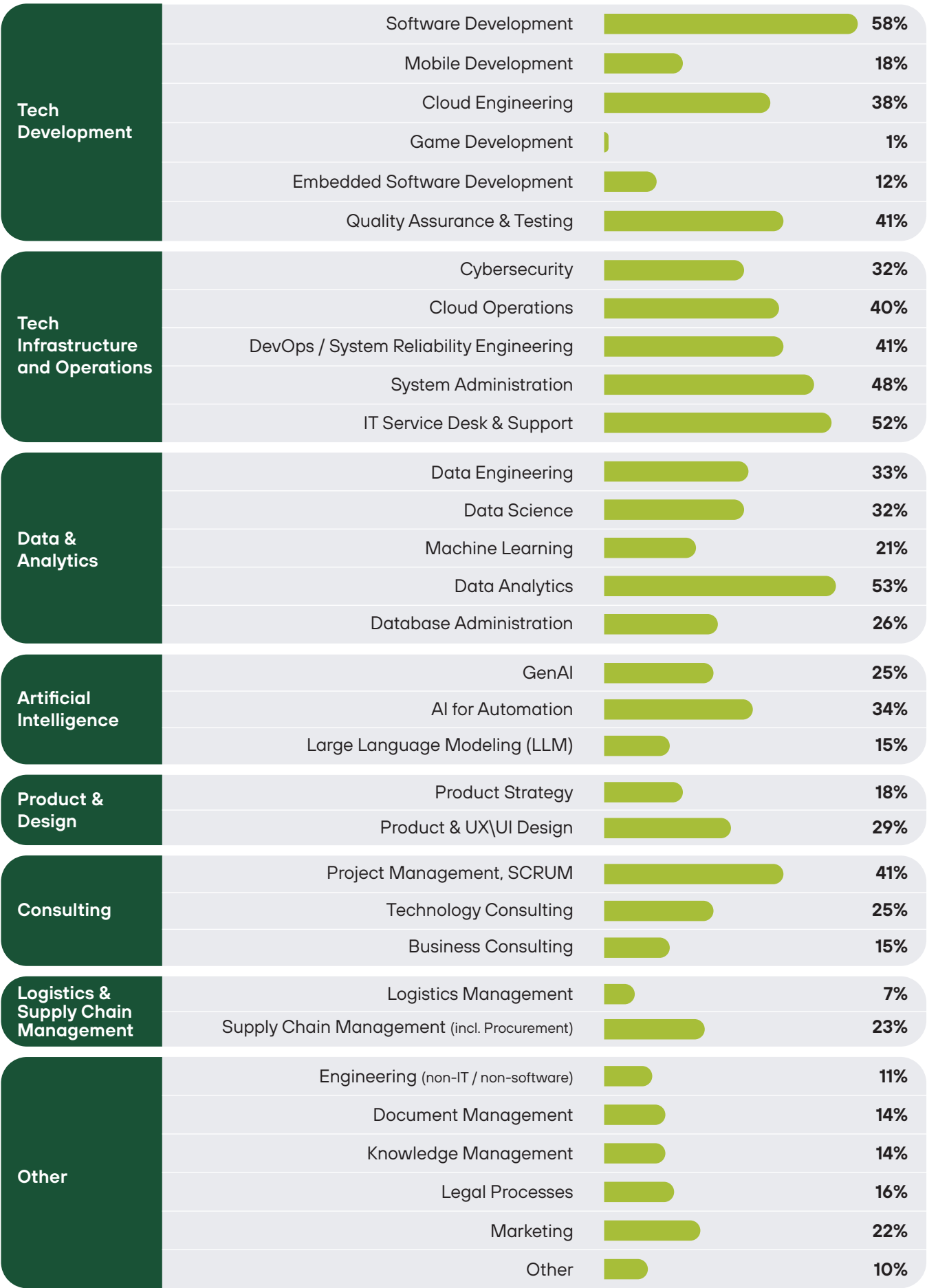
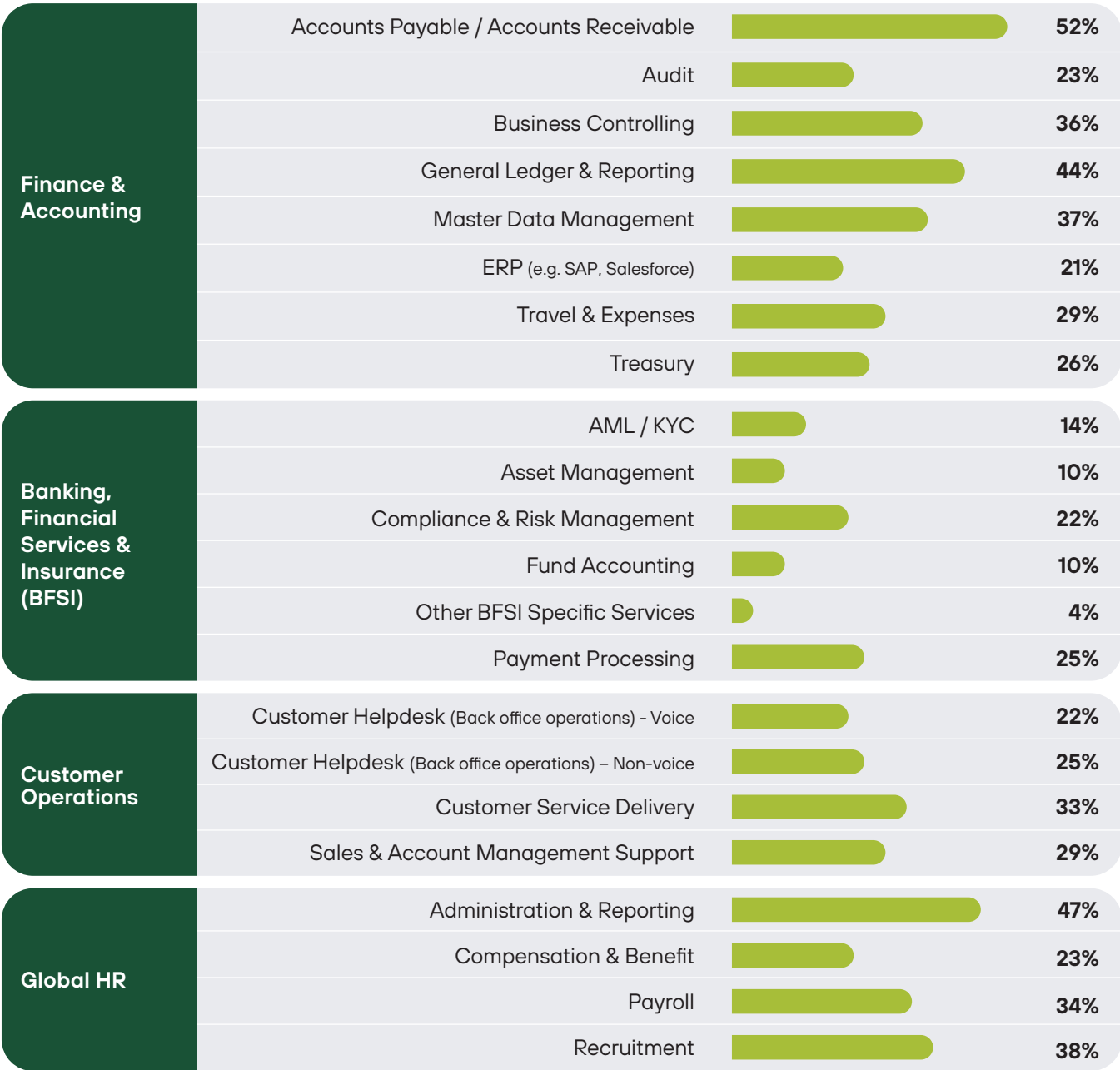
Number of functions performed by share of GBS & ICT centers



## Markets Covered



# GBS & ICT Functions in Detail



Consolidation, Debt Collection, Dynamic Systems Simulation, IT Operations, Regulatory Reporting, Robotic Process Automation, Securities Operations, Surveillance, Systems Integration.



# Innovation at GBS & ICT Centers

## Moving beyond efficiency to value creation

Establishing a GBS center in Lithuania marks not the end, but the beginning of a journey – both for Lithuania and the investing company. The business landscape is never static, with forces like automation, international trade regulations, and talent availability constantly reshaping priorities.

My counsel to centers operating in Lithuania is to position themselves as integral parts of their parent organizations rather than isolated outposts. The tendency to operate as a separate entity – a “fortress to defend” – limits potential. Centers should instead focus on maximizing value for the entire organization.

Where does this value reside? Classical economics identifies several sources: business value generation through new channels and capabilities; cost reduction through improved efficiency; and risk management that mitigates human, financial and other vulnerabilities.

Most companies begin their Lithuanian operations with cost-reduction centers but gradually evolve toward more complex functions. This evolution requires understanding the parent company’s challenges and finding innovative ways to deliver value. As the saying goes: if you don’t create the future, the future will create you – and not always in your favor.

Consider basketball as an analogy: during a game, players typically follow pre-determined, well-practiced plays. Similarly, daily GBS operations involve known

processes, tools, and methods. The real improvement happens off the court – through training and new tactics. GBS centers progress not when they merely deliver expected outcomes, but when they step outside their comfort zone – collaborating with universities, participating in industry meetups, engaging with peers, and experimenting with new approaches.

Success in this innovative space requires a holistic approach. Put your best people on tomorrow’s challenges, not just today’s operations. Create environments where teams can experiment with autonomy and adequate resources. And be selective with technology adoption – you don’t need to reinvent AI but rather leverage existing solutions intelligently.

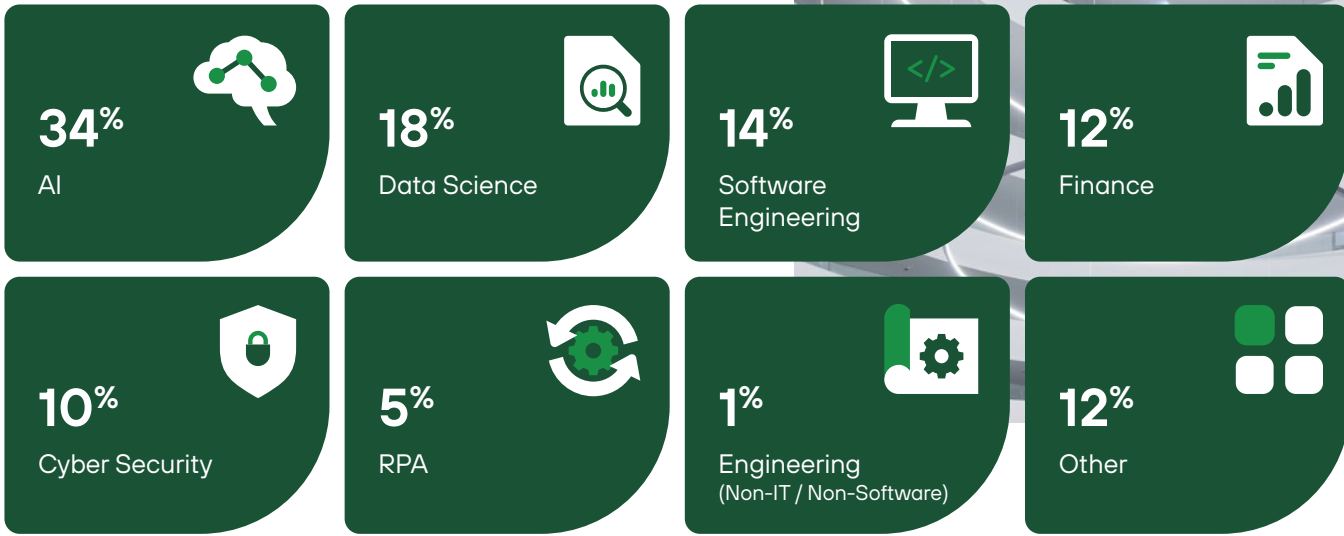


Elijus Čivilis

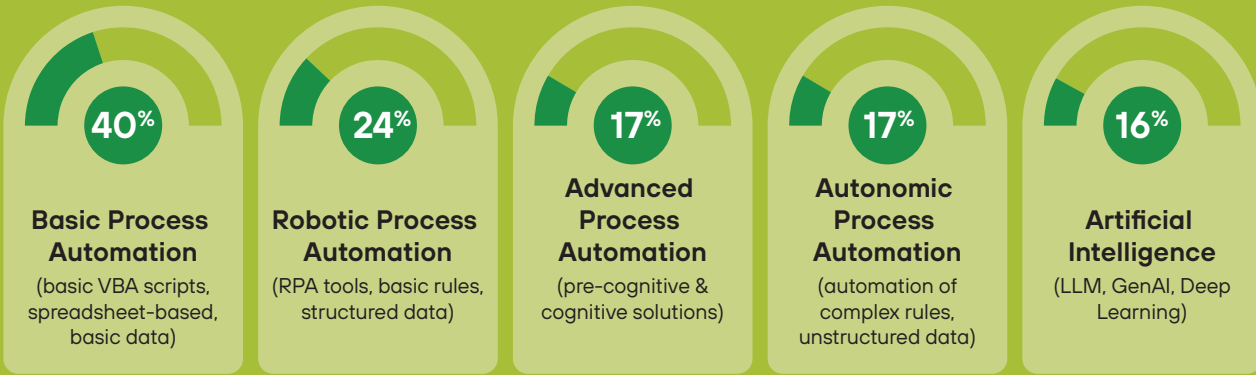
General Manager  
at Invest Lithuania



## New capabilities that companies plan to introduce in their centers in 2025-2026



## Average share of processes automated at different levels of technology in GBS & ICT centers



## GBS & ICT centers use Gen AI for multiple purposes in Lithuania

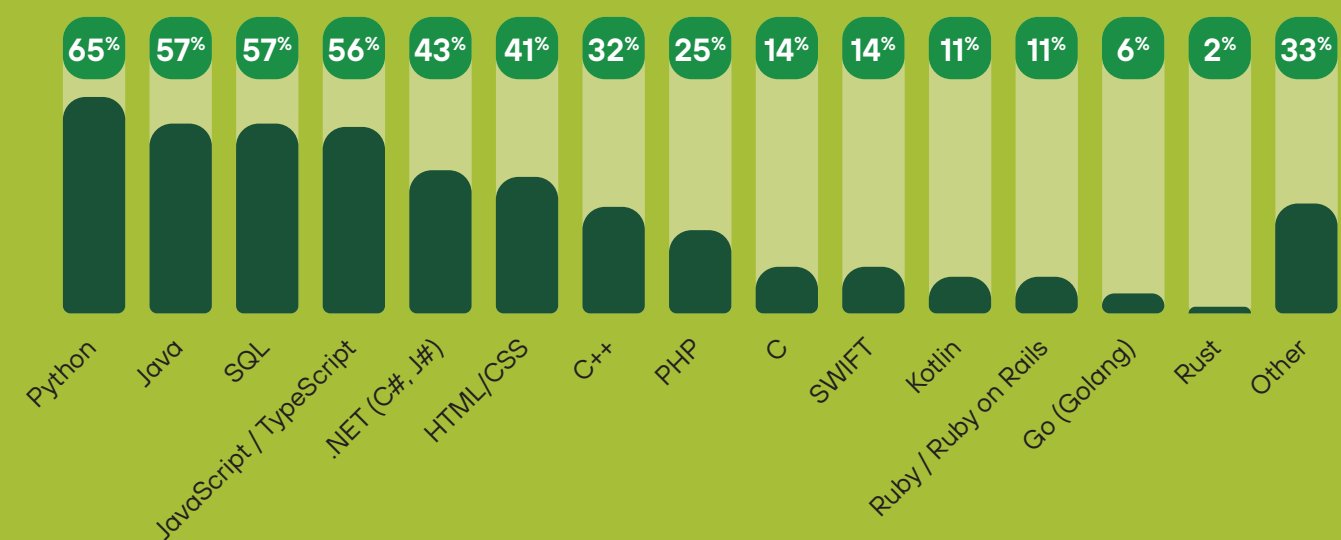


# Tech Capabilities in GBS & ICT Centers

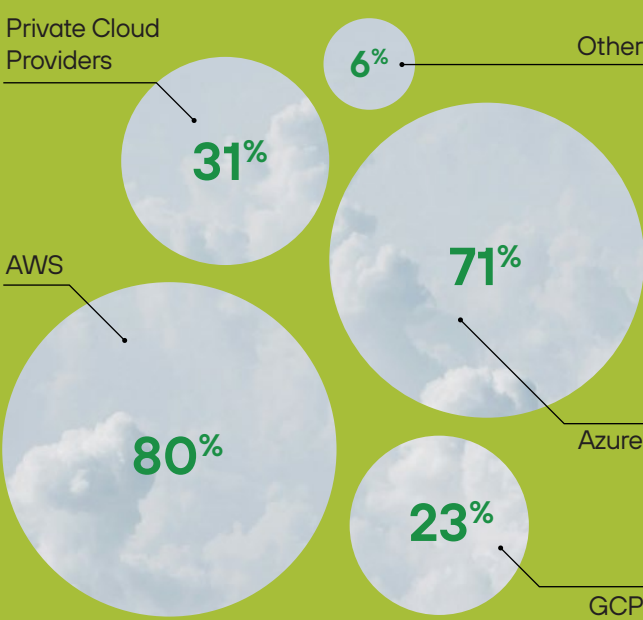
As technology is shaping our societies, Lithuania is positioning itself as a key player in this rapidly evolving landscape. In 2019, the country became the second EU member to adopt a national AI strategy - an early move aimed at securing a leadership role in the region and increasing global relevance. Today, efforts are concentrated on building a regulatory environment supporting AI development. As part of this push,

Lithuania is among the first EU countries to introduce a pilot "AI sandbox" - a dedicated space where local tech companies can design, test, and refine AI solutions in a controlled setting. This initiative is set to fast-track innovation and strengthen the global competitiveness of Lithuanian businesses.

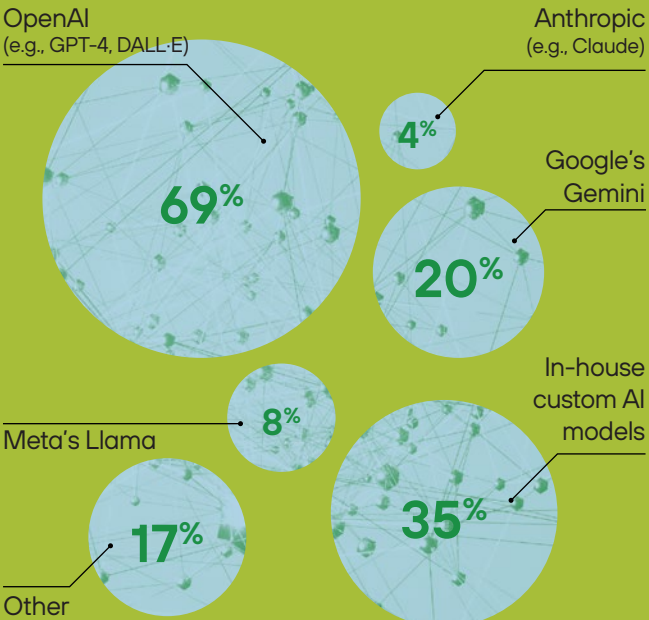
## Most popular programming languages



## Most popular Cloud Computing Service providers among GBS & ICT centers



## Most popular AI models and frameworks used in GBS & ICT centers



# Cooperation with Educational Institutions

## Business-education ties – one-offs or strategic partnerships?

It pleases me to report that the vast majority of GBS centers now have some connection to Lithuanian higher education institutions – be it through career fairs, scholarships, visiting lecturers, or other forms of cooperation. And with the recently signed cooperation agreement with MIT, the educational landscape offers truly next-level opportunities for collaboration. For companies wanting to leverage ties with universities for employer branding, talent attraction, and building social capital, all the necessary conditions exist.

However, with this abundance comes a challenge. As dozens of companies compete for the attention of specialists-to-be, standing out becomes difficult. At the same time, universities indicate they prefer working with businesses on a long-term basis. After all, it takes time to get to know one another and find the optimal cooperation model. One example is the partnership between Cencora and Vilnius University of Applied Sciences – these partners organize joint events, create shared experiences, and communicate regularly. The result? Cencora receives numerous referrals and potential candidates who are already familiar with the company's culture.

One key reason companies reach out to universities is to secure a pipeline of sought-after talent. Here, a strategic approach proves beneficial, as building and adjusting study programs requires time. Just as it takes a village to raise a child, it takes collaborative effort to shape a talent pool. The GBS industry can look to the "Future for Electronics" program as a blueprint—bringing together 4 companies, 2 higher education institutions, and the Kaunas IN city development agency. Running for several years now,

it helps businesses access needed talent while helping educators promote and keep their programs aligned with market trends.

To conclude, building ties with universities and colleges is a long-term investment that might not yield immediate returns, but when results do come, they're sustainable. For those seeking quicker solutions, international hiring remains an option.

61%

Share of GBS & ICT centers cooperating with educational institutions

38%

Share of GBS & ICT centers cooperating with private coding schools

Agnė Perednė

Talent Ecosystem Expert at Work in Lithuania

Work in Lithuania



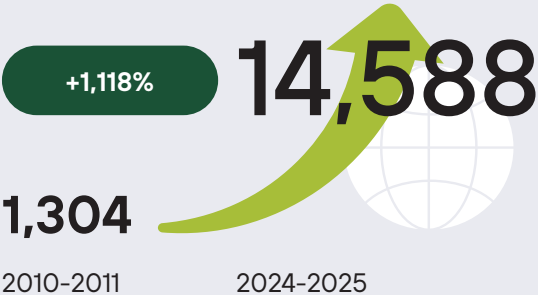


# Talent Pool Development

A decade ago, Lithuania was hardly considered a study destination, apart from several successful programs in IT and Medicine. Today, the situation couldn't be more different. In the last 12 years, the international student body in the country has grown by an impressive 700%. More importantly, the conditions for students to work while studying are ideal – regulations even allow full-time employment. Plus, students from non-EU countries can stay for up to 12 months on their student visa after graduating, which is more than enough time to find a job.

Survey data reveals that international students are highly motivated to work in Lithuania – as many as 47% say they'd be willing to work in the country. Yet only around 10% of them get hired upon graduation. This disconnect is puzzling, especially considering that many of these students possess sought-after technical skills, speak multiple languages and, crucially, are already in Lithuania.

## Full-time international students in Lithuania



Source: National Agency for Education, Education Exchanges Support Foundation, 2025

Vydūnas  
Trapinskas

Director at Work in Lithuania

Work in  
Lithuania

## International students – the definition of an untapped talent pool

The problem is two-fold. First, international students don't really see employers, as most communications channels they use primarily target locals. With only part of the information between administration and students being circulated in English, it is harder for internationals to get an idea regarding which companies are open to hiring them. Second, employers don't see international students. I recently spoke with a representative from a GBS center that already employs more than 60% international specialists. Even they were surprised to learn about this untapped talent pool of almost 15,000 international students that no one is actively addressing.

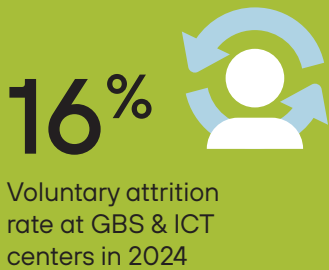
While there are no quick fixes, companies would benefit significantly from developing targeted approaches to engage international students and recent graduates. Be it via partnerships, tailored messaging, or even specialised career fairs and events. Those who move first to capture this diverse talent pool will gain a competitive advantage in Lithuania's increasingly global business landscape.



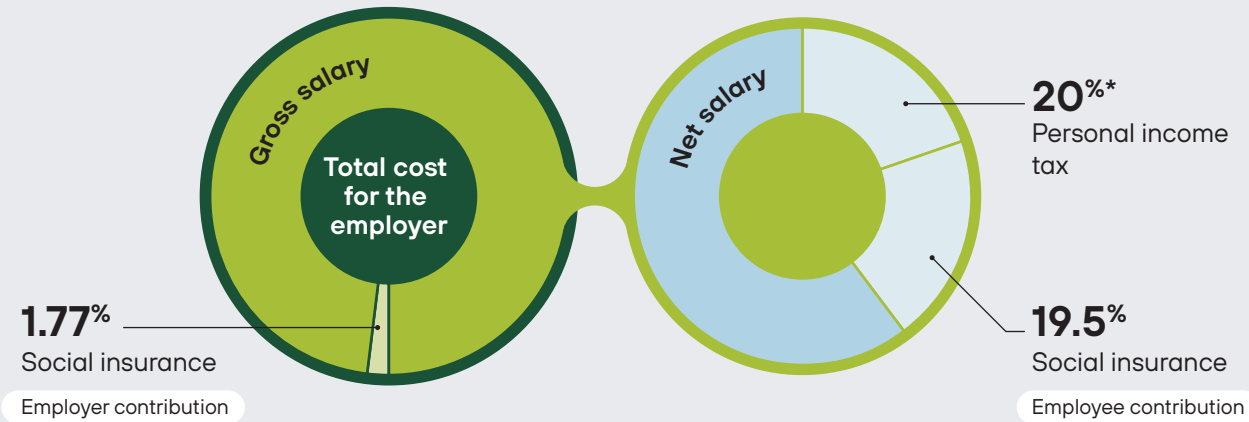
## Voluntary attrition rates in specific function heavy centers



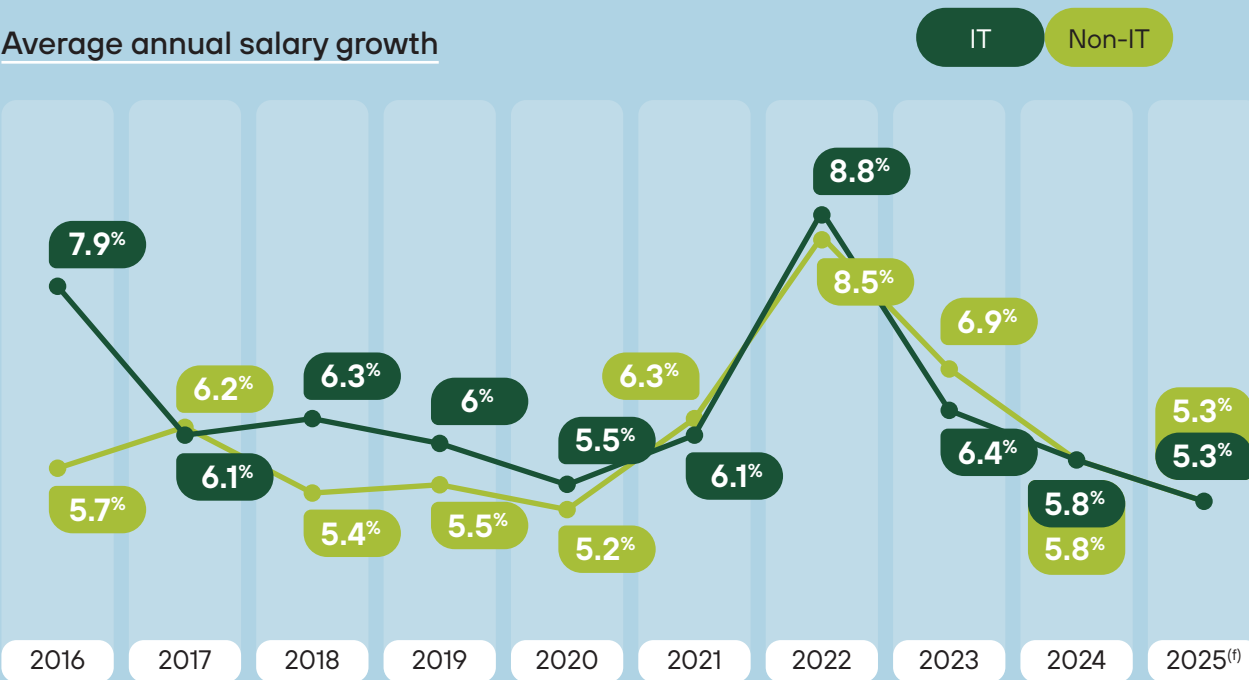
\*Function heavy center: >50% of employees work in a field related function



## Salary structure in Lithuania



## Average annual salary growth





## Salary Ranges

Area	Position	Salary range in Vilnius (total costs), EUR			Salary range in Kaunas (total costs), EUR			Salary range in Klaipėda (total costs), EUR		
		Min.	Max.	Weeks to hire	Min.	Max.	Weeks to hire	Min.	Max.	Weeks to hire
F&A: AP / AR / GL	Junior Accountant (0-2 years' experience)	1,770	2,500	5	1,730	2,450	6	1,630	2,360	6
	Accountant (2-5 years' experience)	2,340	3,230	6	2,290	3,160	7	2,170	3,020	7
	Senior Accountant (over 5 years' experience)	3,120	4,250	7	3,040	4,250	7	2,930	4,050	7
	Team Leader (team of 5-15 people)	4,080	5,350	7	4,050	5,350	7	3,730	4,770	8
	Department Manager (team of 10-30 people)	5,030	6,660	7	5,030	6,660	7	4,920	6,620	8
Finance and Investments	Junior Finance Analyst (0-2 years' experience)	1,880	2,590	5	1,830	2,560	5	1,720	2,470	6
	Finance Analyst (2-5 years' experience)	2,830	3,760	6	2,800	3,750	7	2,720	3,630	7
	Senior Finance Analyst (over 5 years' experience)	3,800	4,520	7	3,790	4,500	7	3,690	4,380	7
	Team Leader (team of 5-15 people)	4,230	5,410	7	4,230	5,410	7	4,120	5,260	7
	Department Manager (team of 10-30 people)	5,030	6,970	8	5,030	6,970	8	5,030	6,930	8
Customer Operations	Junior Specialist (no experience)	1,350	1,710	4	1,300	1,620	5	1,250	1,560	5
	Specialist (over 1 year experience)	1,790	2,310	5	1,740	2,260	6	1,680	2,200	6
	Team Leader (team of 5-15 people)	3,180	4,290	6	3,030	4,290	6	2,880	4,170	7
	Department Manager (team of 10-30 people)	3,830	5,230	7	3,830	5,230	7	3,820	5,190	8
Procurement / Order Management	Junior Specialist (0-2 years' experience)	1,730	2,470	5	1,680	2,430	6	1,590	2,330	6
	Specialist (2-5 years' experience)	2,450	3,230	6	2,400	3,170	6	2,310	3,050	6
	Senior Specialist (over 5 years' experience)	3,090	4,060	7	3,020	4,010	7	2,900	3,840	7
	Team Leader (team of 5-15 people)	3,810	5,150	8	3,760	5,150	8	3,610	5,020	8
	Department Manager (team of 10-30 people)	4,560	5,960	8	4,560	5,960	8	4,560	5,930	7
Engineering	Engineering Support Specialist (0-2 years' experience)	1,900	2,810	6	1,900	2,810	6	1,770	2,670	6
	Engineering Support Specialist (2-5 years' experience)	2,900	3,960	7	2,900	3,960	7	2,720	3,850	7

Area	Position	Salary range in Vilnius (total costs), EUR			Salary range in Kaunas (total costs), EUR			Salary range in Klaipėda (total costs), EUR		
		Min.	Max.	Weeks to hire	Min.	Max.	Weeks to hire	Min.	Max.	Weeks to hire
HR processes	Junior Specialist (0-2 years' experience)	1,730	2,300	5	1,730	2,300	6	1,630	2,230	6
	Specialist (2-5 years' experience)	2,350	3,490	5	2,290	3,490	6	2,230	3,380	6
	Senior Specialist (over 5 years' experience)	3,430	4,750	6	3,430	4,750	7	3,320	4,600	7
	Team Leader (team of 5-15 people)	3,900	5,630	7	3,900	5,630	7	3,770	5,450	7
	Department Manager (team of 10-30 people)	5,040	7,220	8	5,040	7,220	7	5,040	7,120	8
Marketing and Comms	Junior Specialist (0-2 years' experience)	1,740	2,360	5	1,690	2,250	6	1,590	2,200	6
	Specialist (2-5 years' experience)	2,430	3,600	6	2,330	3,600	6	2,270	3,500	7
	Senior Specialist (over 5 years' experience)	3,660	4,880	6	3,660	4,880	7	3,560	4,790	7
	Team Leader (team of 5-15 people)	4,190	5,780	6	4,190	5,780	7	4,070	5,640	7
	Department Manager (team of 10-30 people)	5,260	6,580	7	5,260	6,580	8	5,260	6,580	8
Information Technology	Junior Developer (0-2 years' experience)	2,180	3,370	6	2,050	3,140	6	1,900	2,980	6
	Specialist Developer (2-5 years' experience)	3,020	5,170	7	2,720	4,940	7	2,510	4,760	7
	Senior Developer (over 5 years' experience)	4,440	7,320	7	4,050	7,000	7	3,880	6,710	8
	Team Leader (team of 5-15 people)	6,320	8,610	8	5,820	8,150	8	5,630	7,850	8
	Department Manager (team of 10-30 people)	7,620	10,190	8	6,890	9,750	8	6,840	9,540	9
Trending	Cyber Security Specialist (2-5 years' experience)	3,180	5,350	8	3,160	5,350	8	3,010	5,230	8
	Cloud architect (3+ years' experience)	4,740	7,250	8	4,740	7,250	8	4,580	7,090	9
	QA Engineer (2-5 years' experience)	3,150	4,920	6	3,150	4,920	6	3,000	4,740	6
	Compliance Specialist / Officer (2-5 years' experience)	3,290	4,670	6	3,290	4,670	6	3,150	4,510	6
	Data Scientist (2-5 years' experience)	3,690	5,820	8	3,690	5,820	8	3,580	5,630	8
	Supply Chain Manager (2-5 years' experience)	3,010	4,460	6	2,970	4,460	6	2,890	4,300	6
	AI Specialist (3+ years' experience)	4,090	6,770	8	4,090	6,770	9	3,900	6,650	10
	Project Manager (2-5 years' experience)	2,650	4,590	6	2,620	4,590	6	2,570	4,510	6
	Scrum Master / Agile Coach (+3 years' experience)	3,510	5,280	7	3,510	5,280	7	3,360	5,120	7

# International Talent Migration

Vilnius has become remarkably diverse, hosting nearly 77,000 foreigners from over 140 countries. This influx of global talent brings fresh perspectives and expertise to Lithuania’s business landscape, but attracting talent is only half the equation – retention through meaningful integration is equally crucial.

At International House Vilnius, we conduct regular surveys that show highly qualified talent tends to be satisfied with life in Vilnius, partly thanks to employers’ efforts. We often encounter companies creating their own dedicated teams to help newcomers integrate into city life. Employers recognize that attracting talent costs time and money, but retention is equally important – there’s a growing understanding that without investing in integration, talent will simply turn around and leave.

Integration becomes particularly complex when specialists relocate with families. It encompasses everything from a child’s experience at school to the spouse’s sense of belonging and professional opportunities. I’m encouraged to see employers increasingly focused on holistic integration – some have even approached us to help establish social clubs for accompanying partners.

Vilnius offers several competitive advantages in talent attraction. Our digital infrastructure allows for exceptional efficiency – opening a company and processing employment documents in less than one working day is a genuine quality marker. We also benefit from being a smaller, walkable city with high safety levels and quality healthcare and education services. Most importantly, our growing high-value

## Integration – the key to retaining international talent

sectors provide accelerated career advancement opportunities that larger metropolises often cannot match.

However, challenges remain. Our somewhat reserved national character can initially make social integration difficult, particularly for those from more expressive cultures. Additionally, while there’s no shortage of information, there is a need for more accessible, comprehensible resources that don’t require deciphering legal terminology.

For Lithuania to fully capitalize on international talent, we need a more systematic, strategic approach to integration – one where employer initiatives harmonize beautifully with state and municipal efforts. This synergy is beginning to emerge in Vilnius, positioning us favorably compared to many European cities.



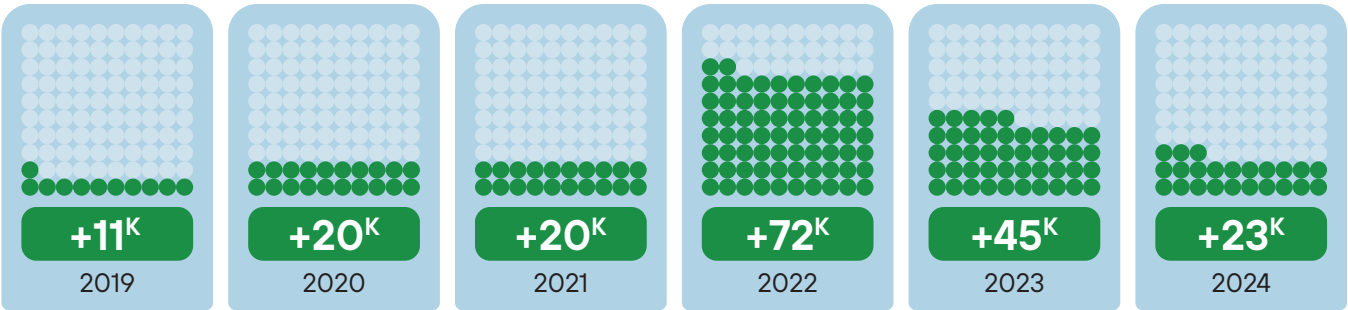
**Indrė Laučienė**

Head of International House Vilnius



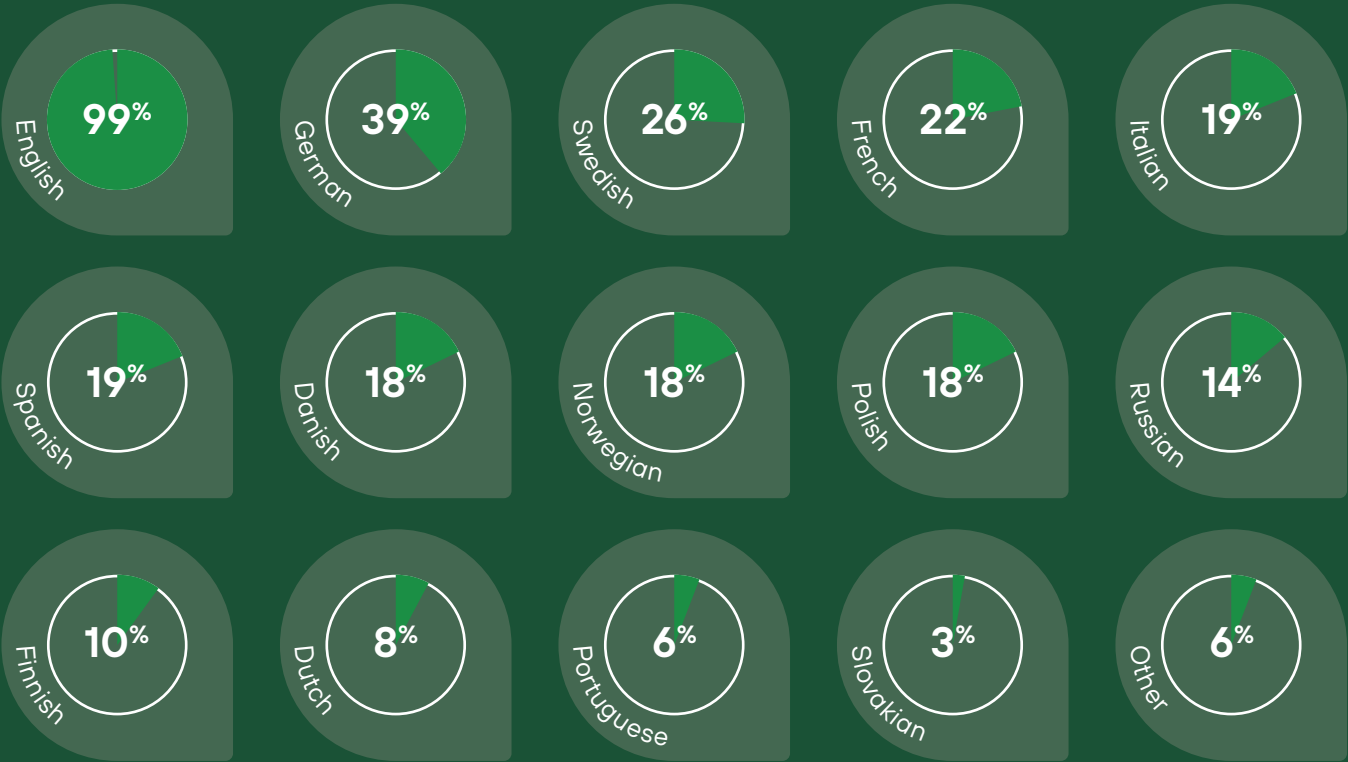
International House Vilnius

## Lithuania has recorded positive net migration for 6 years in a row



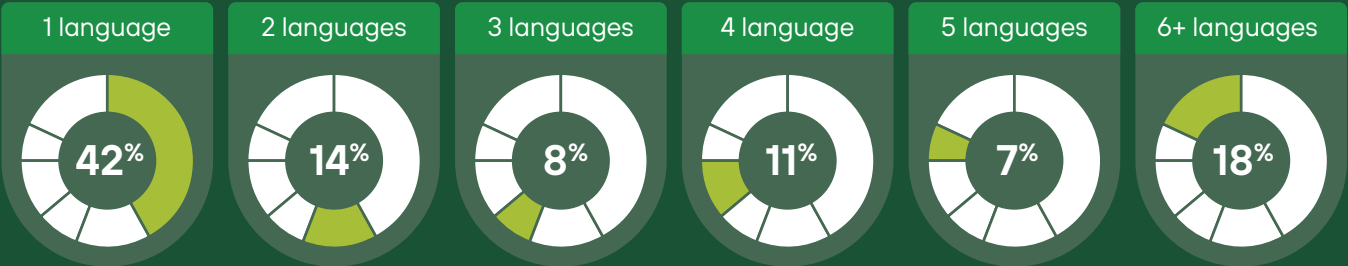
Source: State Data Agency of Lithuania, 2025

## Share of centers delivering services in foreign languages



Arabic, Bulgarian, Croatian, Czech, Estonian, Greek, Hindi, Hungarian, Japanese, Latvian, Mandarin, Romanian, Serbian, Turkish, Urdu.

## Number of foreign languages spoken in a center





# Geopolitics and Stability

GBS operations require a safe and stable investment environment. In Lithuania, this stability, essential for business continuity and long-term planning, is secured through a number of interconnected factors.

At the foundation lies Lithuania's NATO membership, which serves as the primary guarantor of the country's security. In recent years, the alliance has strengthened its collective defense capabilities in response to regional developments, implementing enhanced air defense systems, simplified decision-making procedures, and regular large-scale exercises. This commitment is mirrored by Lithuania's own substantial investments – today, the country ranks among NATO leaders in defense spending relative to GDP.

Strategic partnerships further enhance this security framework. Germany's parliament has ratified a bilateral agreement regarding the posting of a brigade in Lithuania that will reach full operational capacity by 2027. The continuous deployment of the US troops since 2019 serves as another essential deterrent, as does our active cooperation with Poland and other Baltic states.

For GBS investors, this stable environment is reflected in growing investments and expanding infrastructure. Advanced technologies are being developed locally, with investments from major global companies from key partner countries, including the US, Germany, Nordic nations and beyond.

## Security and stability as key pillars of Lithuania's GBS & ICT ecosystem

Lithuania's EU membership provides additional layers of economic security and market access within one of the world's strongest economic spaces. Together with our NATO membership and growing international business community, it forms the foundation upon which Lithuania's sophisticated GBS ecosystem continues to flourish and innovate.

### Lithuania is part of every major international organization



**Orijana Mašalė**  
Vice-Minister of National Defence



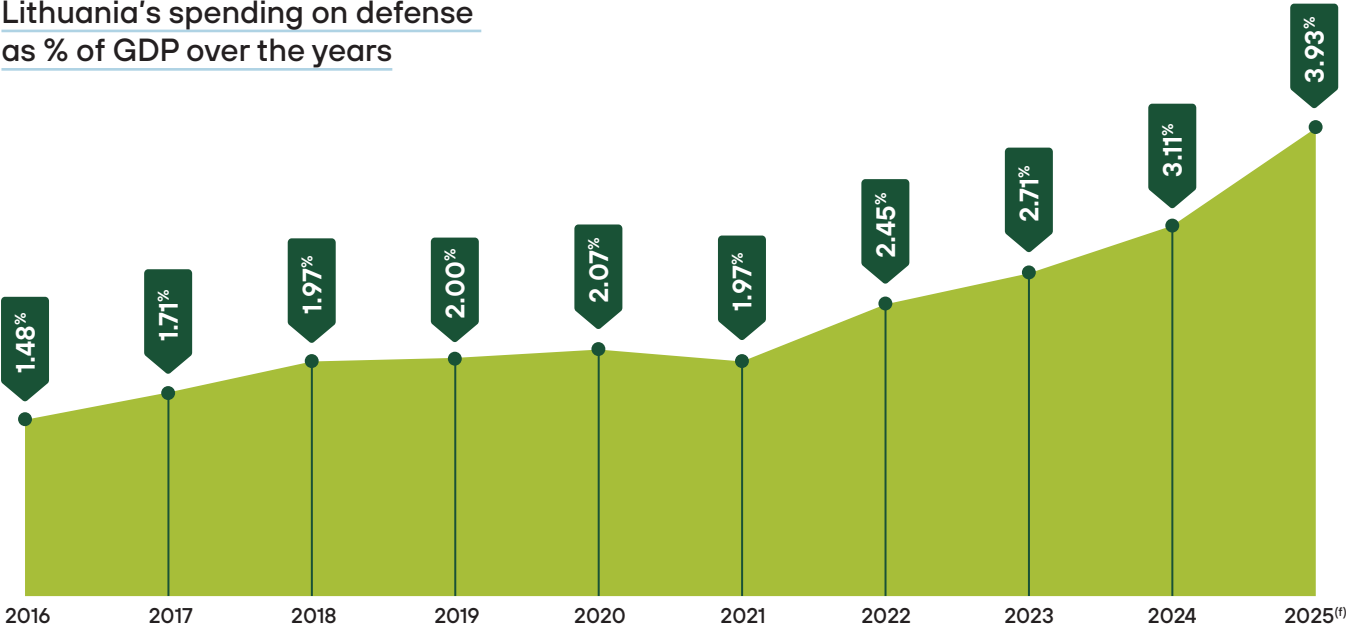
**94%**

Share of investor companies whose business strategy remains unchanged despite geopolitical tensions

**73%**

Share of investor companies whose GBS & ICT center growth plans are unaffected by the geopolitical situation in the region

### Lithuania's spending on defense as % of GDP over the years



Source: Ministry of National Defence of Republic of Lithuania, 2025

**Company's activity**

automotive and arms manufacturer

**HQ**

Düsseldorf, Germany

**Type of investment**

construction of 155 mm artillery ammunition plant in Baisogala, Lithuania

**CAPEX investment**

€180 million

**Planned FTEs**

150



© Sergeant K. Kavolėlis, Ministry of National Defence of the Republic of Lithuania



# Financial Incentives for Investment

As one of Europe’s most dynamic economies, Lithuania has crafted a thoughtful approach to financial incentives for investors. Beyond the standard offerings found across the region, our incentive system reflects an understanding of what truly matters to GBS operations.

What makes Lithuania’s approach distinctive? While many CEE countries limit their financial support to less-developed regions or specific technology sectors, Lithuania offers meaningful incentives even for investments in Vilnius, our capital city and primary business hub. This pragmatic approach acknowledges where talent naturally concentrates while still encouraging regional development.

For GBS investors specifically, our incentives are designed to attract sophisticated operations. Companies establishing centers that involve complex functions, knowledge-intensive services, or innovation activities can receive substantial financial support spanning several years. The level of support is directly tied to the investment size, function complexity, and number of jobs created – making it particularly attractive for GBS investors looking to establish or expand their service infrastructure while optimizing operational costs.

## Financial incentives supporting GBS growth

When comparing Lithuania to other CEE locations, investors highlight our competitive edge not just in the financial packages offered, but in how they’re delivered. The combination of meaningful incentives with streamlined administrative processes creates real value. While some countries might promise similar benefits on paper, the reality often involves lengthy approval times and bureaucratic hurdles.

Our philosophy is simple: financial incentives should work as accelerators rather than compensatory mechanisms. They’re designed to help companies establish operations faster, reach operational excellence sooner, and scale more efficiently. This approach has proven particularly valuable to GBS investors, who operate in environments where speed and agility are increasingly competitive advantages.



Tadas Jagminas

Director of Project Management  
Department at Invest Lithuania

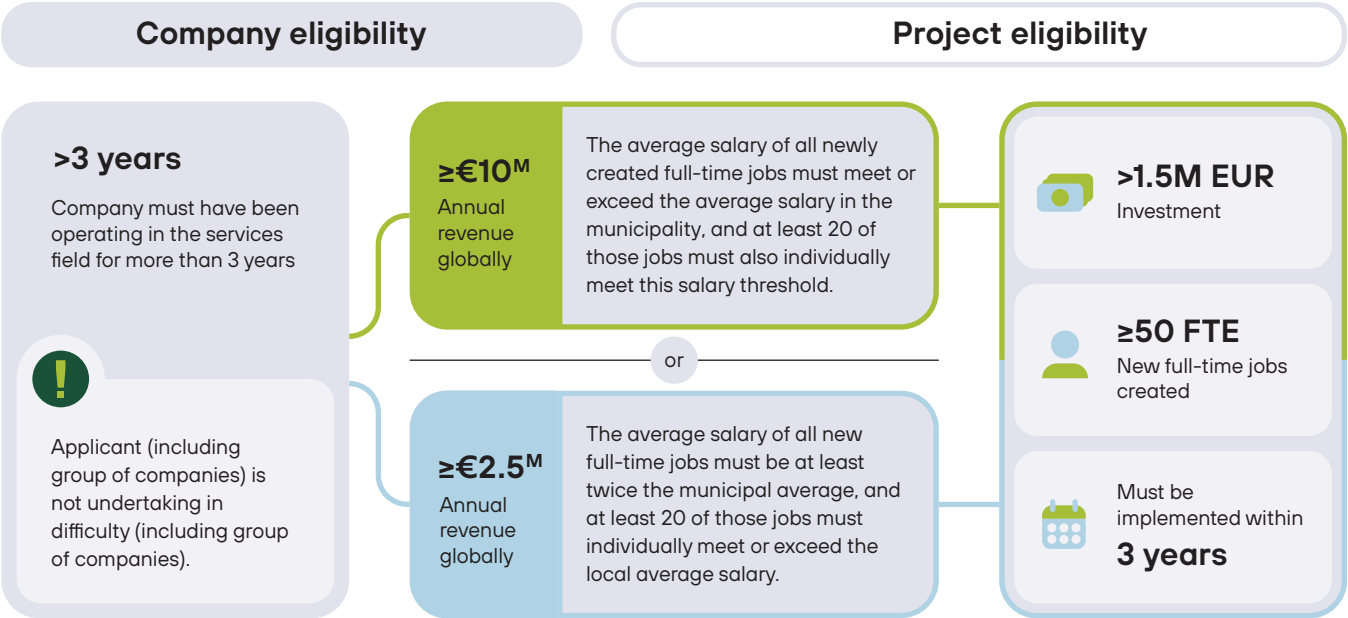


## 2024 EU Incentive Friendliness Ranking

	Hungary	Poland	Lithuania	Romania	Slovakia	Latvia	Spain	Czechia	Bulgaria	France
Total	1	2	3	4	5	6	7	8	9	10
Aid Intensity	4	7	1	4	4	1	10	8	3	15
Flexibility	1	2	5	6	7	17	9	3	8	14
Cash vs. Tax	1	2	7	3	3	12	7	1	12	3
Business Oriented Authorities	1	1	1	7	11	7	1	11	14	1

Source: Hickey & Associates, 2024

## Invest LT+: Financial support for employment costs



## Project evaluation

Quantitative criteria	Qualitative criteria	Assessment of the impact on the economy
<ul style="list-style-type: none"><li>Number of new jobs to be created</li><li>Average monthly salary</li></ul>	<ul style="list-style-type: none"><li>Innovative product and use of high technology</li><li>Effect on clustering</li><li>Effect on the long-term development of the economy, competitiveness and social welfare</li><li>Export growth potential</li><li>Importance of operations to long-term high added value area</li><li>Shared Value Investment*</li></ul>	<p>Investment project can receive additional scores if:</p> <ul style="list-style-type: none"><li><b>&gt;1.65x avg. salary.</b> Average salary of all new jobs must be greater than 1.65 times the average salary in municipality in which the investment is implemented</li><li><b>&gt;50%</b> of the qualitative assessment scores</li></ul>

\* Shared Value Investments are practices that enhance the competitiveness of the company while simultaneously advancing social and economic conditions in the community in which it operates. The main criterion is that Shared Value investments benefit society as a whole, rather than the company directly.

# Physical and Digital Infrastructure

As the GBS and ICT sector has grown, so has Lithuania's infrastructural landscape, with development and expansion witnessed in office spaces, flight connections, and digital capabilities.

The office market in Vilnius has achieved a balance between supply and demand through natural market forces. However, with 38 GBS employees per 1,000 residents (compared to just 16 in Kaunas), some saturation is evident. This has increased investors' interest in Kaunas, which offers an attractive talent-to-cost ratio for niche functions and smaller tech-focused companies.

The Kaunas office market faced challenges in 2023 with a notable shortage of prime commercial real estate. Developers were reluctant to build on spec without anchor tenants, while GBS clients hesitated to commit without seeing completed buildings. Following coordinated efforts with market stakeholders, two new A-class office buildings totaling 15,000 sq.m. are confirmed for completion in Kaunas by 2026.

Air connectivity remains crucial for international operations, and new routes are being developed by Lithuanian Airports. Through a risk-sharing model with airlines, routes between Vilnius and London City, Hamburg have been renewed, and a connection with Dusseldorf has been established.

Another important topic nowadays is energy, and Lithuania has plenty of it. By 2028, Lithuania commits to power all its electricity needs entirely from renewable sources, as well as to become a carbon-neutral country by 2050. Furthermore, Lithuania, together with Latvia and Estonia, disconnected their electricity systems from Russia's power grid in 2025

## Infrastructure evolution shaping Lithuania's GBS sector

in a move designed to integrate the countries more closely with the European Union and boost security. This strategic focus and long-term thinking ensure that our country can become even more resilient to outer threats, as well as offer the best possible infrastructure to our investors, such as Data Centers.

Lithuania's digital infrastructure is equally impressive, ranking 8th globally in the National Cyber Security Index. Over 80% of internet users accessed e-Government services at least once last year, while the country ranks 7th in the EU for digital public services for businesses. Notably, Lithuania places 2nd in the EU for using administrative data to reduce documentation burdens across various life situations.

As Lithuania continues developing its infrastructure, ongoing collaboration between public and private stakeholders creates sustainable solutions, reinforcing the country's position as an attractive GBS destination.

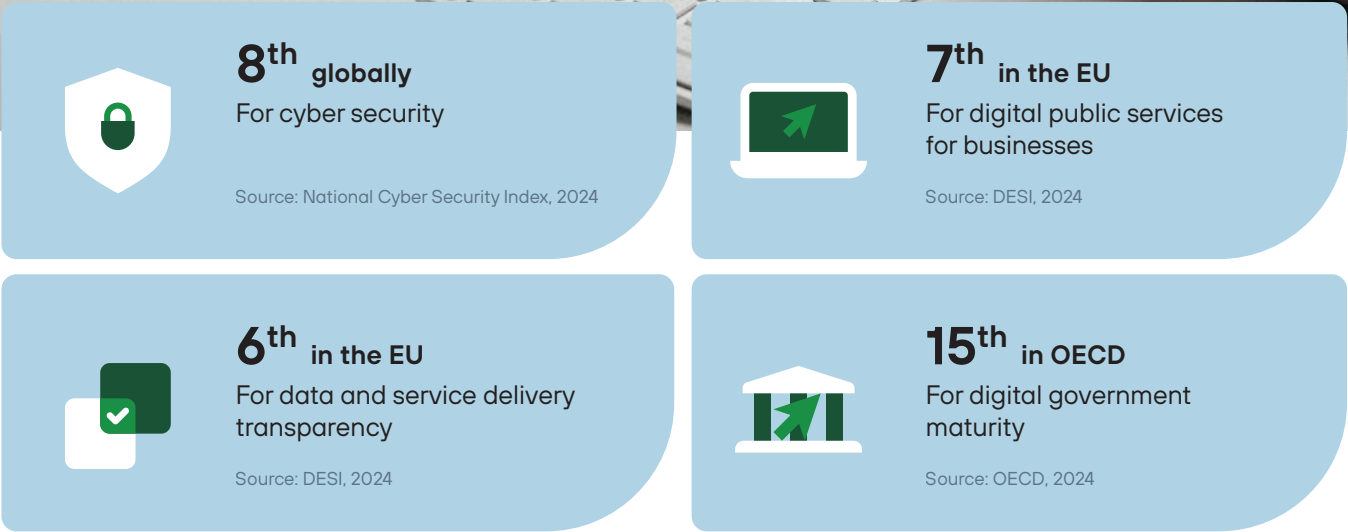


Virginija Gelžinytė Gečienė

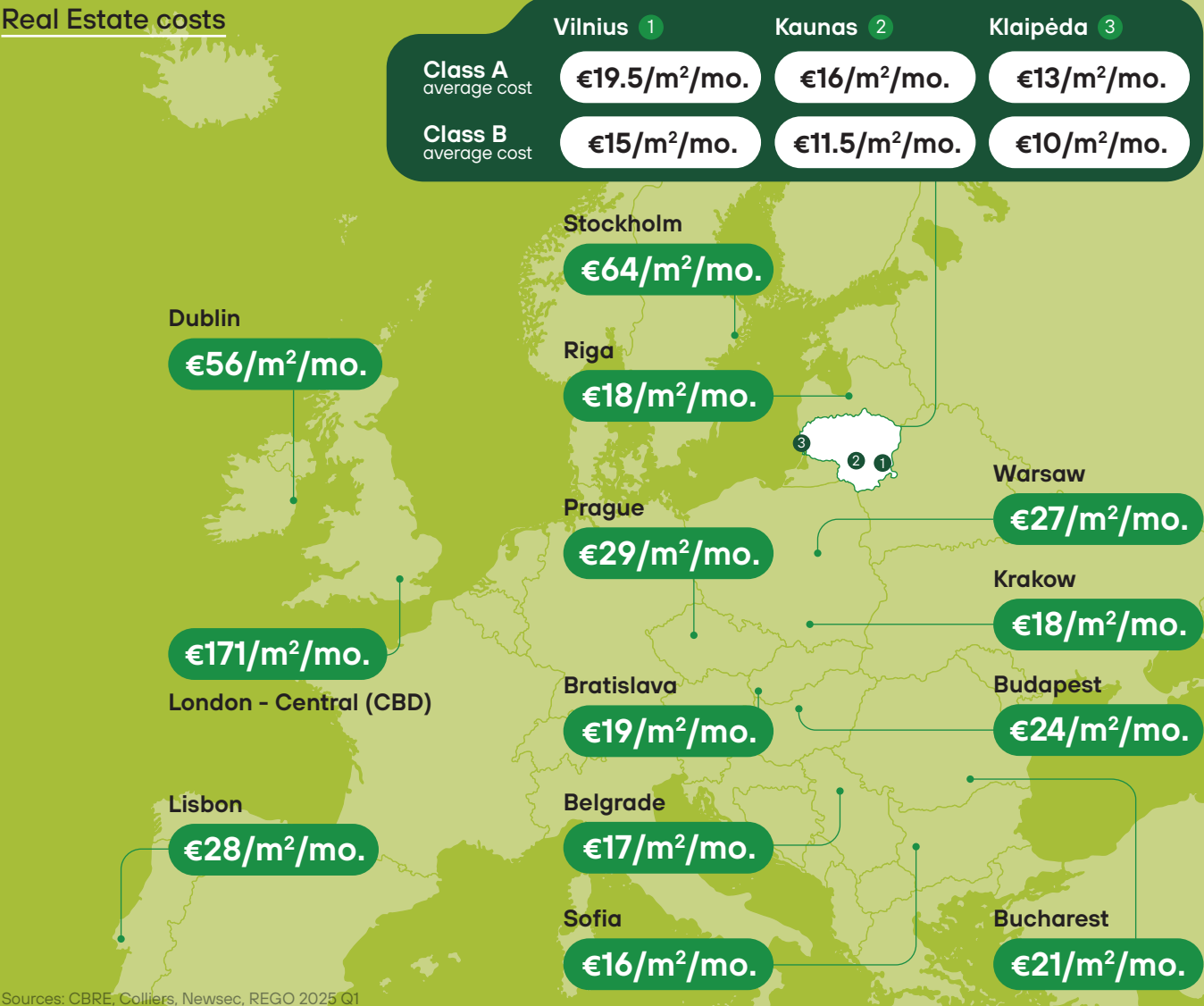
Head of Infrastructure Solutions at Invest Lithuania



### Notable facts about Lithuania's digital infrastructure



### Real Estate costs



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