

Invest Lithuania

Lithuania
Co-create

Lithuania's Business Services & ICT Industry Employee Report



2024

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About 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.

Informed Decision-Making

We equip you with essential information and expert insights to help you make well-founded decisions regarding your business operations:

- Comprehensive market and industry analysis tailored to your needs.
- Detailed cost assessments to help you plan your investment efficiently.
- Guidance on local labor laws and regulatory frameworks to ensure compliance.
- Organized site visits, including introductions to industry peers, universities, and government representatives, with customized agendas to facilitate your location selection process.

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Preface

Dear Reader,

We are pleased to present the 2024 edition of the employee survey report for Lithuania’s Global Business Services (GBS) & ICT sector.

First launched during the COVID-19 pandemic to assess employee satisfaction during the shift to remote work, this survey has since become a valuable benchmark for tracking long-term sentiment and navigating the evolution of hybrid work models.

Now in its fourth edition, the report provides key insights into employee perspectives, revealing satisfaction trends and how hybrid work policies influence career decisions. Conducted in collaboration with the GBS community, it highlights areas for improvement and illustrates how the priorities of professionals are changing.

We hope these insights help companies refine workplace policies and enhance employee experiences, benefiting the more than 27,000 professionals currently working in Lithuania’s GBS & ICT ecosystem and beyond.

We invite you to explore the findings and use them to navigate the future of work.



Milda Miliūnė
Product Strategist for GBS and Technology



Seamless Business Setup

We ensure a smooth and successful establishment of your company by connecting you with key players:

- Introductions to important stakeholders, including industry leaders and government institutions.
- Evaluation of available financial support opportunities, including incentives from local authorities and EU funding programs.
- Strategic PR and marketing support, helping you build local brand awareness.



Ongoing Business Growth

Our commitment extends beyond your initial setup—we continue to assist you as your business develops:

- Solutions for operational challenges, offering support for any issues that arise.
- Advocacy and lobbying efforts, working to enhance government support for your business.
- Talent acquisition assistance, helping you find the right employees through the “Work in Lithuania” program.

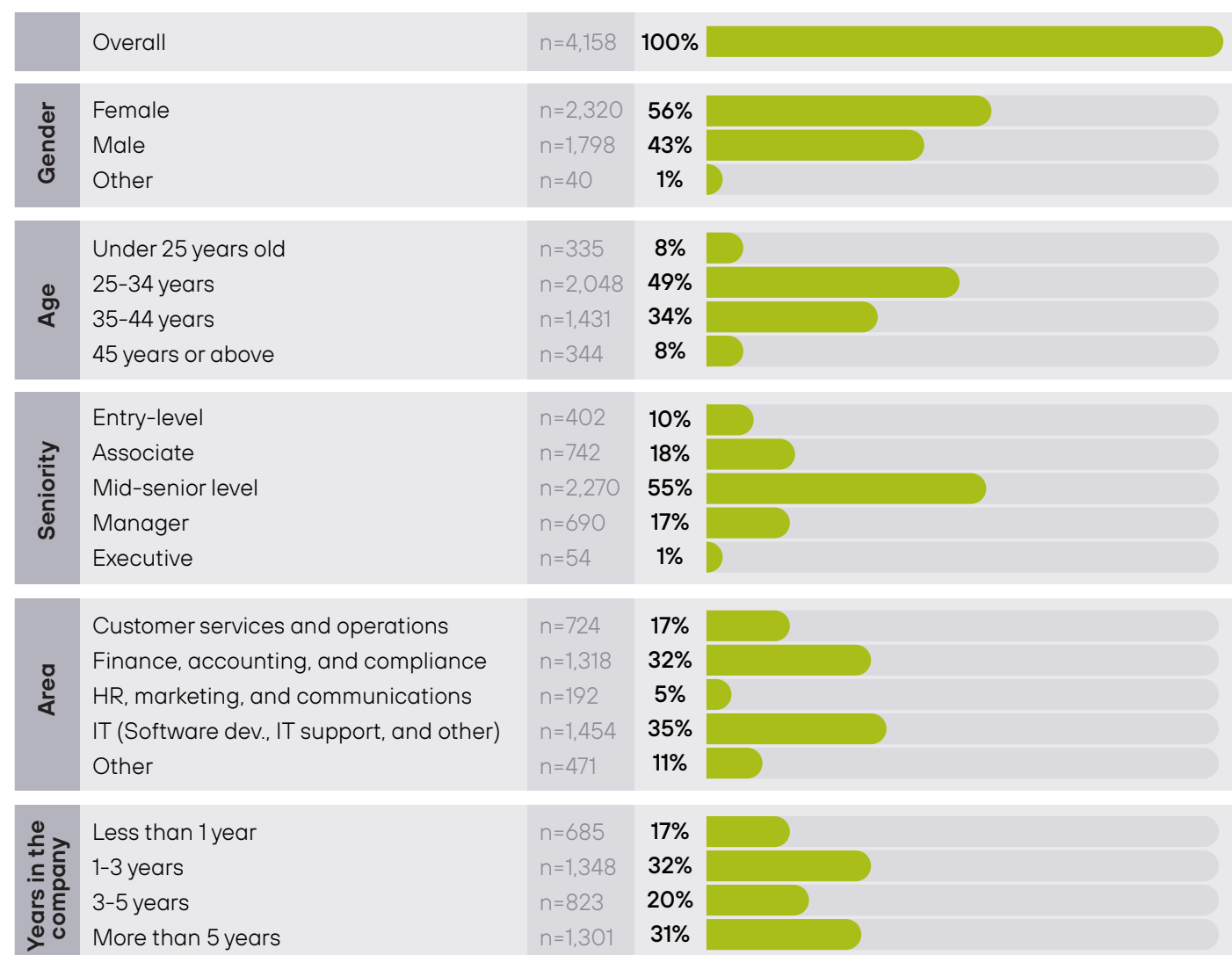
About the survey

The aim of this study is to better understand the habits, motivations, and attitudes of employees in the GBS & ICT industry concerning their employers, their intention to remain with their company, and ways of finding new employment. The findings reveal which factors drive employer selection, enabling companies to strengthen their employer brand and attract top talent.

16 companies, each with at least 200 employees, participated in this survey. Combined, the companies surveyed employ over 12,500 professionals. This represents over 46% of the total labor force of the Global Business Services & ICT industry in Lithuania.

The survey was carried out between 9th of October 2024 and 7th of November 2024 by Invest Lithuania.

Participant profile

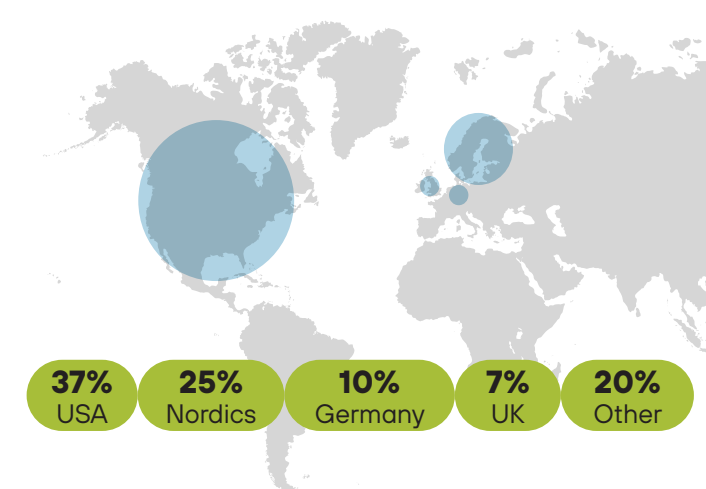


Note: overall industry results are weighted to adjust for the difference between the sample and actual shares of employees in each company. Number of employees as of 2024-09-30 (data provided by the State Social Insurance Fund Board). Company results are unweighted.

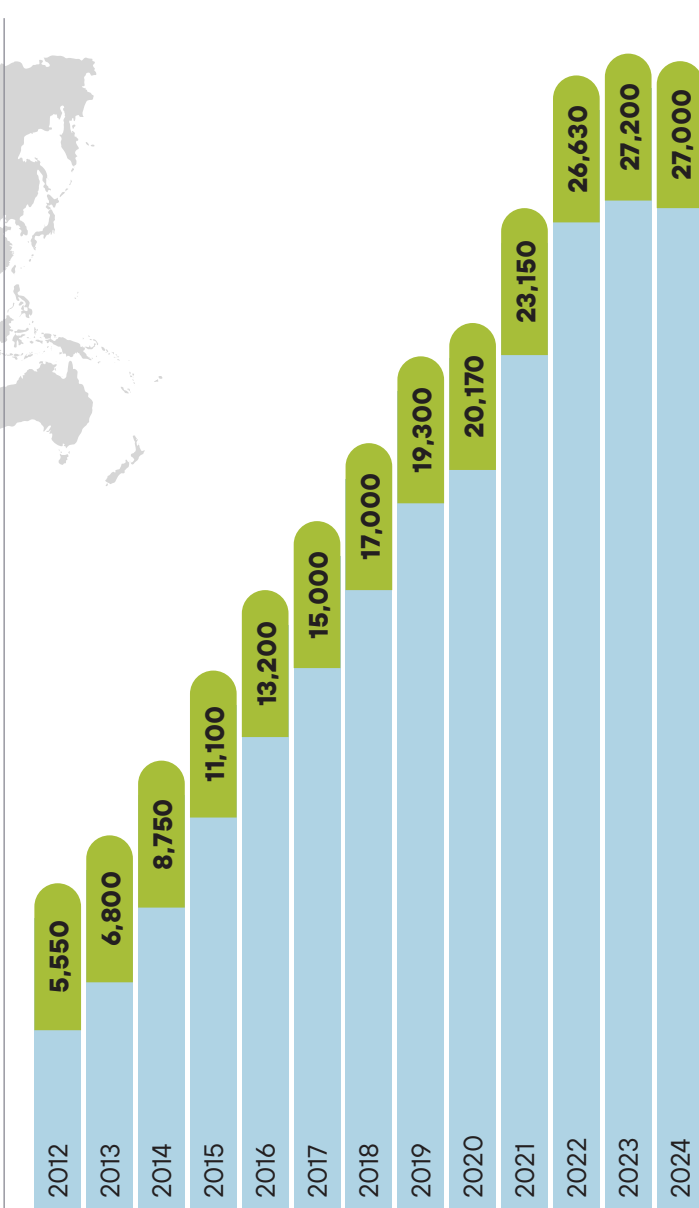
Business services & ICT industry overview



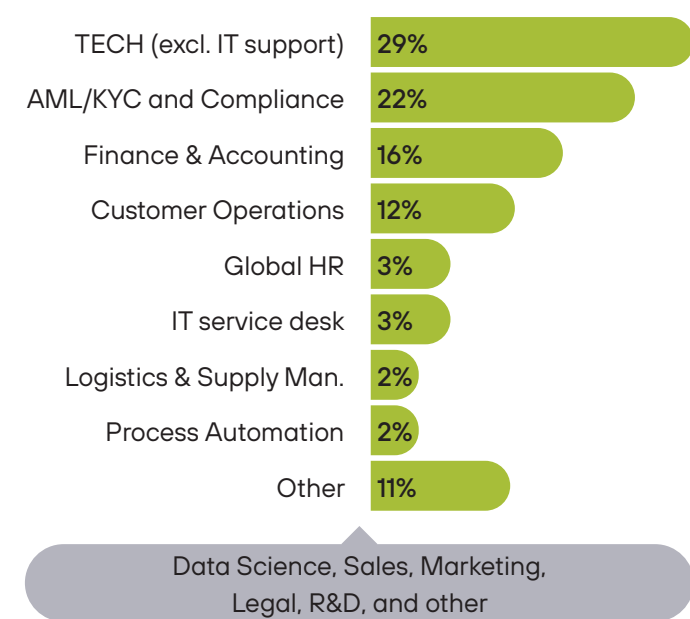
Share of centers by parent HQ location²



People employed in GBS & ICT industry¹



Share of employees by function²



* Customer service covers not only call center functions, but also the broader scope of customer operations

Source 1: Date of data collection: 31st Jan. 2025
Source 2: Lithuania's business services report 2024, Invest Lithuania

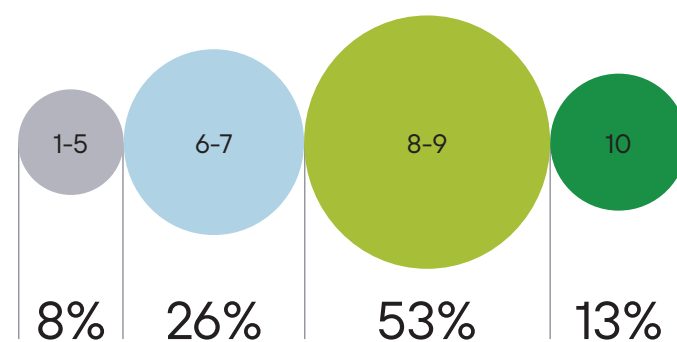
Satisfaction with employment

Employee satisfaction was assessed using a 10-point scale, revealing that satisfaction levels remain, as in previous years, consistently high. The average satisfaction score stood at 7.84 out of 10, slightly lower than the previous year. And similar to last year, over two-thirds of surveyed employees rated themselves as “very satisfied” (scoring 8 or above).

Overall, 92% of employees expressed satisfaction with their jobs, scoring 6 or higher. However, certain groups experienced minor declines in their ratings. For instance, satisfaction among entry-level employees dropped slightly, with 89% reporting satisfaction compared to 91% last year. Conversely, employees with 3-5 years of tenure saw an improvement in their scores, suggesting that workplace conditions have become more favorable for long-term employees. It’s great to see that satisfaction among those in associate positions remained strong, with 91% rating their experience at 6 or above. This encouraging trend suggests that the industry is well-positioned to improve employee retention and lower turnover rates.

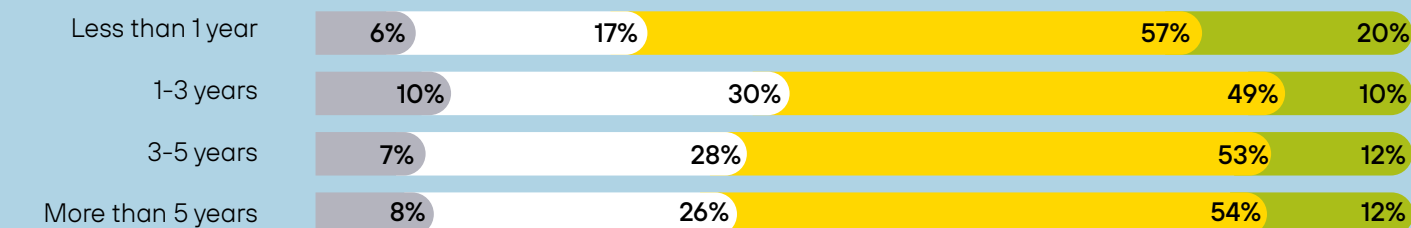


Overall satisfaction of the industry

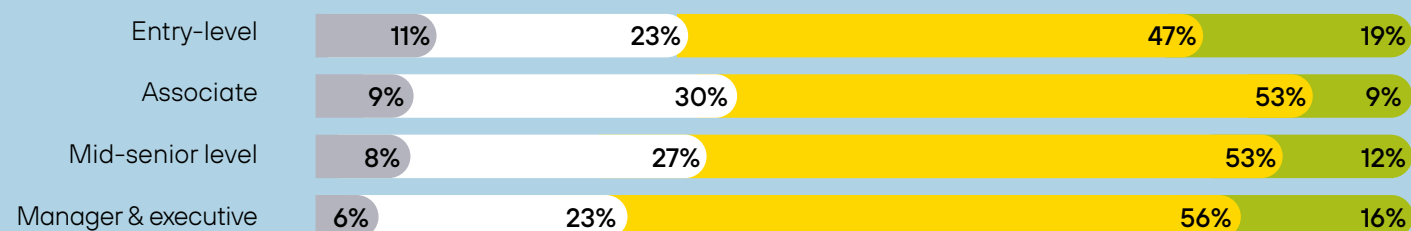


Question: In general, how satisfied are you working at your company?
Base: GBS & ICT industry, n=4,158

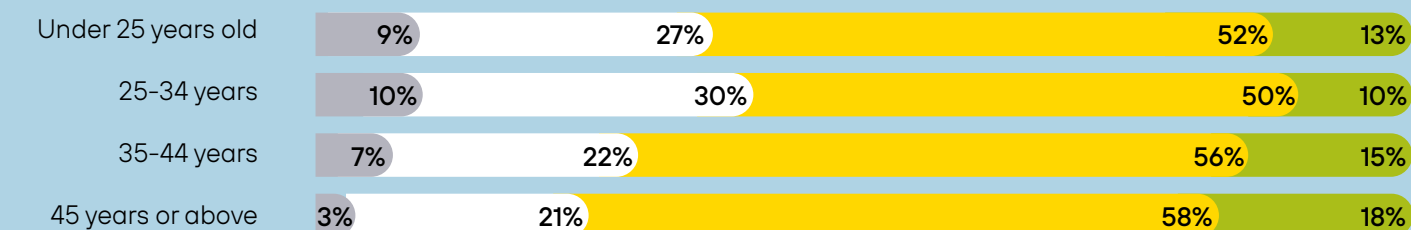
Satisfaction by duration of employment



Satisfaction by seniority level



Satisfaction by age



Extremely dissatisfied (1-5) — Dissatisfied (6-7) — Satisfied (8-9) — Extremely satisfied (10)

Sources of information on employers and jobs

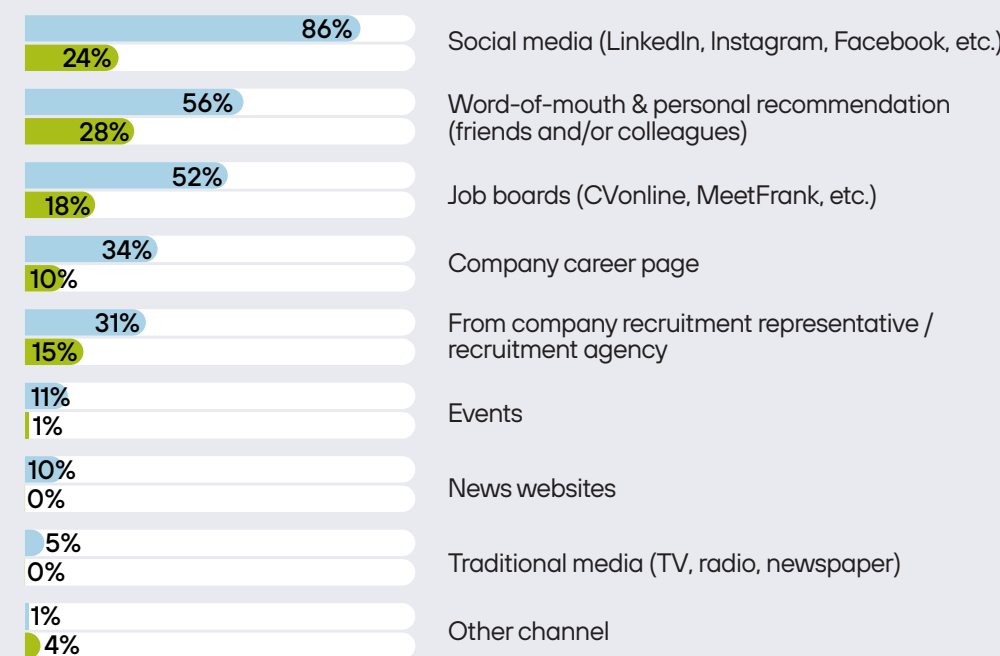
The survey examined where employees typically search for job opportunities and gather insights about potential employers. As in previous years, social media, word-of-mouth recommendations, and online job boards remained the three most common sources.

The influence of social media on job searches grew significantly, with 24% of employees finding their current role through these platforms — an increase of six percentage points from the previous year. LinkedIn was the dominant platform in this space, as 95% of those who secured a job through social media used it. Meanwhile, Facebook’s role in

job searches declined, with its popularity dropping by four percentage points.

Among all the sources utilized, personal referrals continued to be the most effective, with 28% of respondents stating that they first learned about their job opening through a recommendation. Online job boards accounted for 18% of job discoveries, marking a slight decrease from last year. Within this category, CVbankas and CVonline were the most frequently used platforms, with 71% of job board users relying on CVbankas and 66% on CVonline.

Means of finding information about employers and jobs



Question: Where do you most often get information about companies that you consider potential employers? (Multiple choice)

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

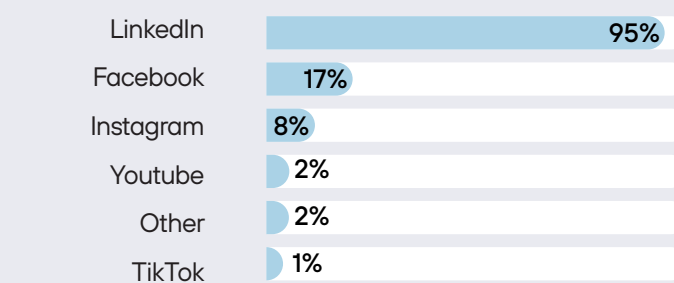
Base: GBS & ICT industry, n=4,158

Finding information about

employers

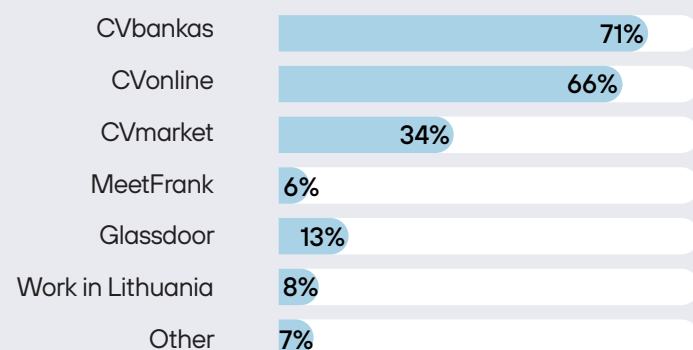
open positions

Social media by popularity



Question: On which social media platforms do you most often get information about potential employers?
Base: GBS & ICT industry, n=3,522

Job boards by popularity



Question: On which job boards do you most often get information about potential employers?
Base: GBS & ICT industry, n=2,282

Employee priorities at their workplaces

Signs of positive development in the industry

Job seekers evaluate potential employers based on compensation, workplace culture, and professional development opportunities. To no one's surprise, competitive salary is the most crucial factor for employees, with 97% considering it important. Encouragingly, employee satisfaction with employer performance rose from 39% to 43% between 2023 and 2024.

Similarly, work-life balance remains a key priority, even climbing a few percentage points, with its importance now evaluated at 93%. Meanwhile, employee



satisfaction with work-life balance increased from 73% to 77%, reflecting successful employer initiatives.

Additionally, the reputation of companies has seen a positive shift, with employee evaluation increasing from 72% to 75%. This suggests firms have made efforts to improve their brand image both inside and outside their organization.

Opportunities for growth and enhancement

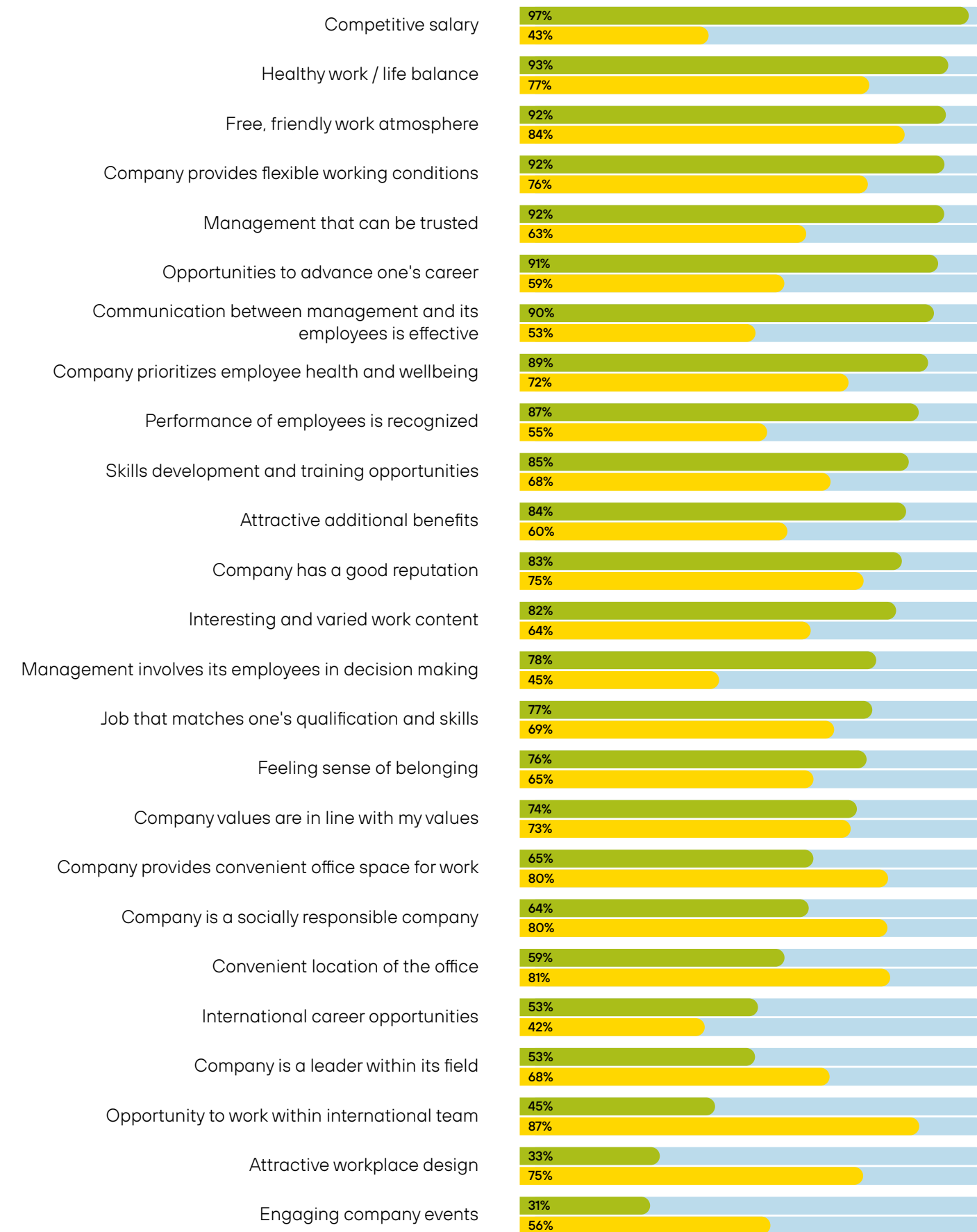
While there was an increase in the amount of criteria for which 80% or more employees chose evaluations of "extremely well" and "very well" this year, several of the most important ones saw decreases in their evaluations. For example, trust in management scored 63%, a decrease of 4 percentage points from last year. Similarly, employees' involvement in decision-making also fell by 6pp. These decreases signal that a widening gap is beginning to appear between management and talent, which may eventually threaten to erode workplace engagement and organizational trust.

Moreover, there is a decrease of 3pp in the number of workers who believe that their employer is committed to offer flexible working conditions, from 79% to 76%. This is not the only metric to have experienced a drop, as the number of employees who believe their performance has been recognized has dropped from 59% to 55%.

While this might not be the case in every organization, these changes might indicate that the power in the industry is shifting toward the employers. Nevertheless, what is important is how this power will be used and what kind of new trends it will bring.



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



● Importance of the criterion to employees ● Employee evaluation of how well the criterion is met

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

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

Base: GBS & ICT industry, n=4,158

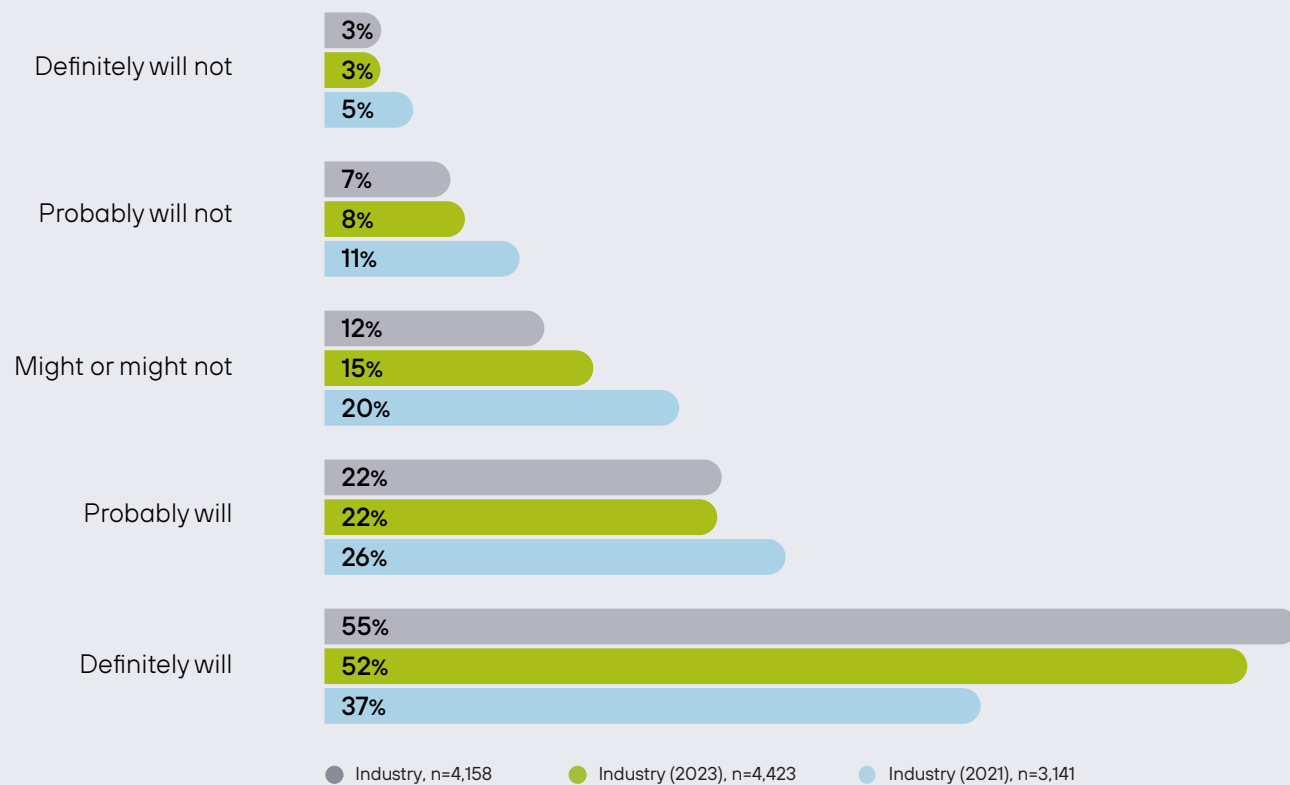
Is hybrid work policy still relevant?

While some companies are encouraging their employees to return to the offices, both in Lithuania and abroad, it seems that hybrid work is here to stay, at least for a while longer. Our survey data reveals that more employees now view workplace flexibility as a decisive factor in their career decisions. Furthermore, we noticed that changes in hybrid work policy in some companies might have caused lower employee satisfaction scores overall. This suggests that organizations who maintain flexible work policies will gain a competitive advantage, while those resisting change risk talent loss and increased workforce demands.

Our findings suggest that hybrid work policies most strongly influence career decisions among younger workers, with employees under 45 showing greater sensitivity to workplace flexibility. The impact varies significantly by demographics: those 45 and older reported an 8 percentage point decrease in policy sensitivity, while women rated flexible work as 10 percentage points more important than men.

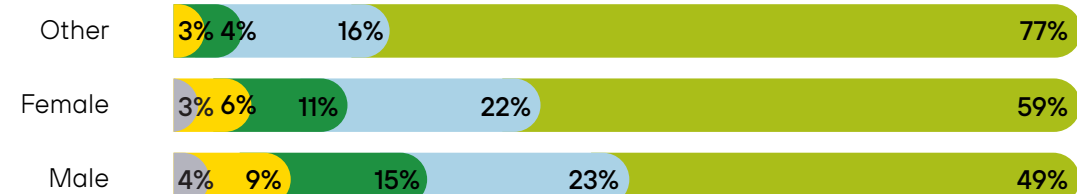


Overall significance of hybrid work policy

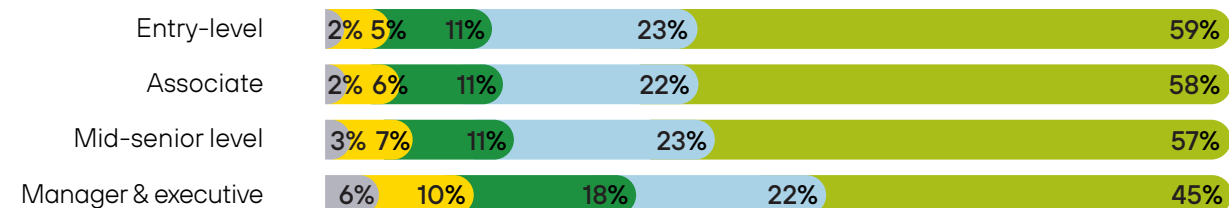


Question: How significantly will the hybrid work policy of a company impact your next career step?

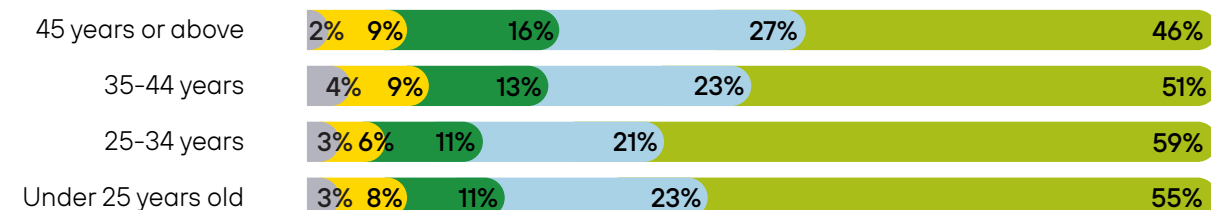
Significance by gender



Significance by seniority level



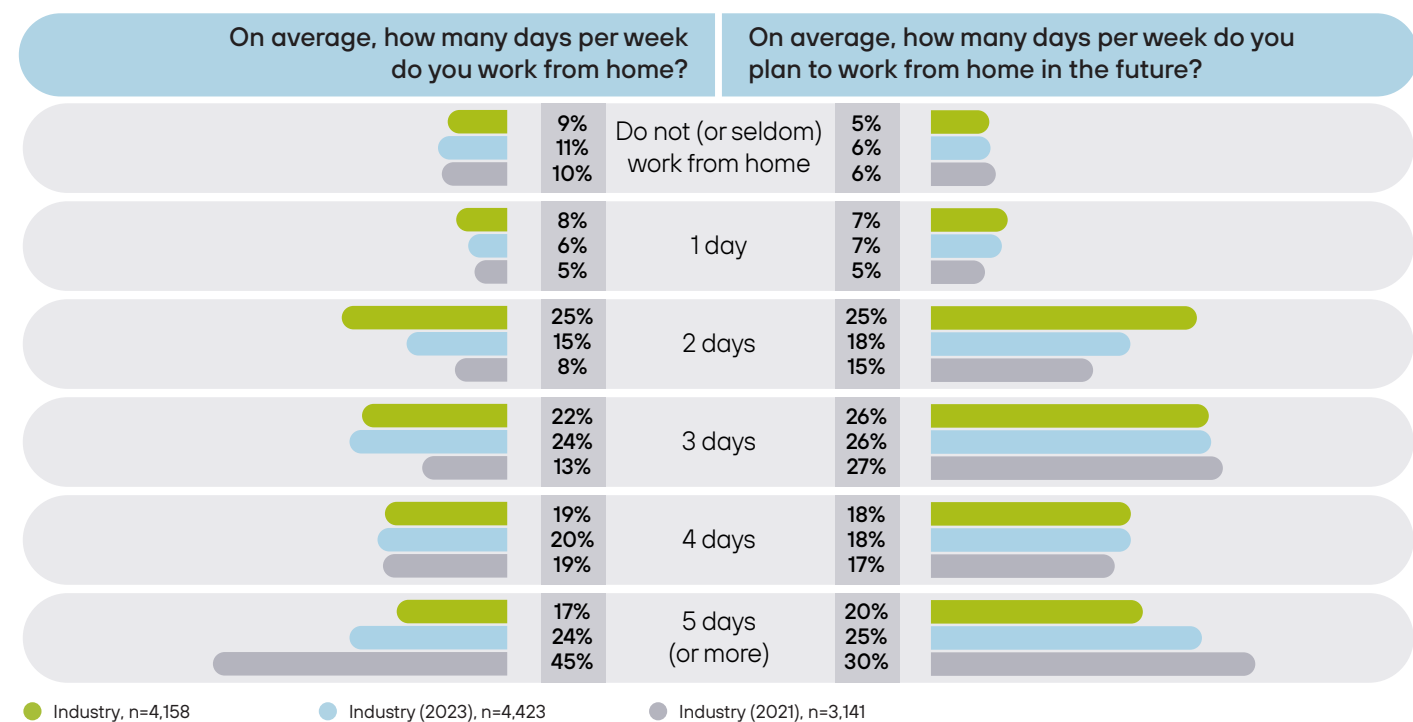
Significance by age



Hybrid work arrangements

While there are less employees who rarely work from home, there are also far less talents working from home all week. As we can see, most of the industry is now working between 2-4 days from home, with 2 days being the most popular option – this figure increased by more than 60% since last year. In addition, we can say that

this will probably be true next year as well, as 25% of employees also think that they will stay at home for 2 days per week in the future. Nevertheless, the trend of working from home for 3 days is expected to be more common as well.



Deep dive: software developers and other tech specialists

Despite a slight decline in satisfaction levels, tech workers maintain the highest engagement scores among major employee segments. Moreover, tech specialists are the group that receives the most attention from recruitment agencies and HR departments, which is a clear indication that higher demand exists for this talent in the market.

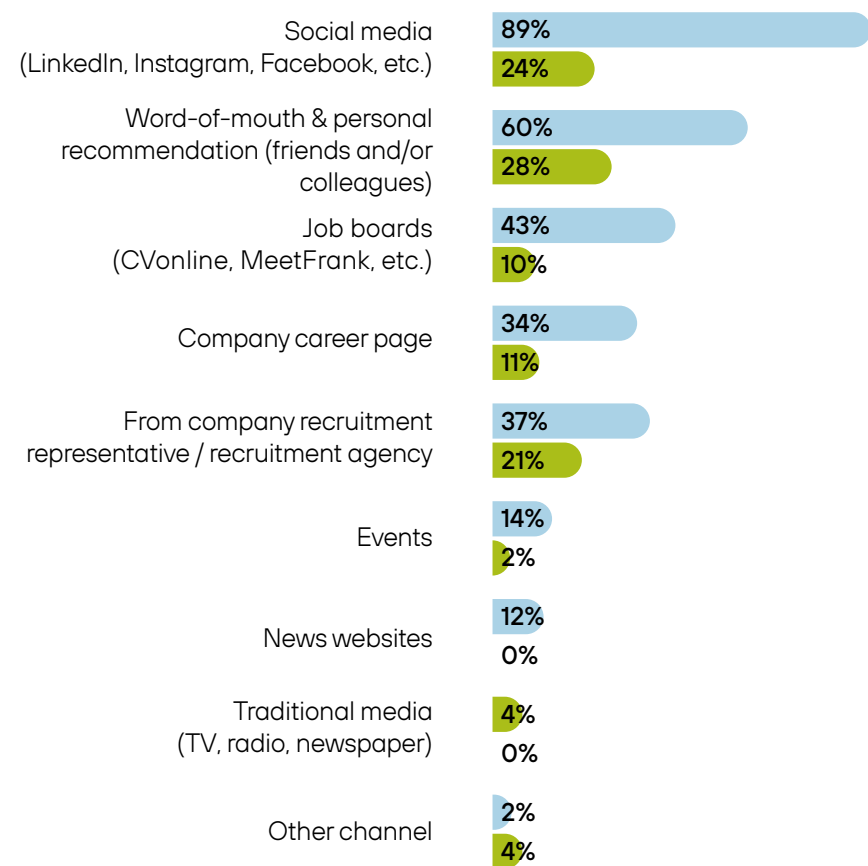
While competitive salary remained the most important criterion for tech specialists, with most of those surveyed claiming that their employer can provide them this benefit – 49% of employees this year against 42% last year.

Satisfaction with employment



This increased level of wage satisfaction may be reflected in the finding that, despite growing demand for tech professionals in the market, this group shows strong company loyalty, with retention rates nearly matching those of HR and marketing specialists. Meanwhile, Tech workers' sensitivity to hybrid policies declined further, with only 49% citing workplace flexibility as a factor in career decisions, down from 54% last year.

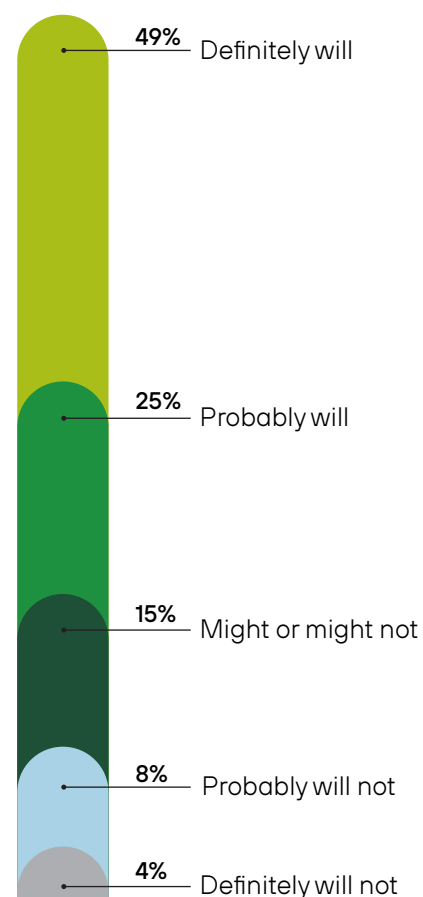
Means of finding information about employers and jobs



Finding information about ● employers ● open positions

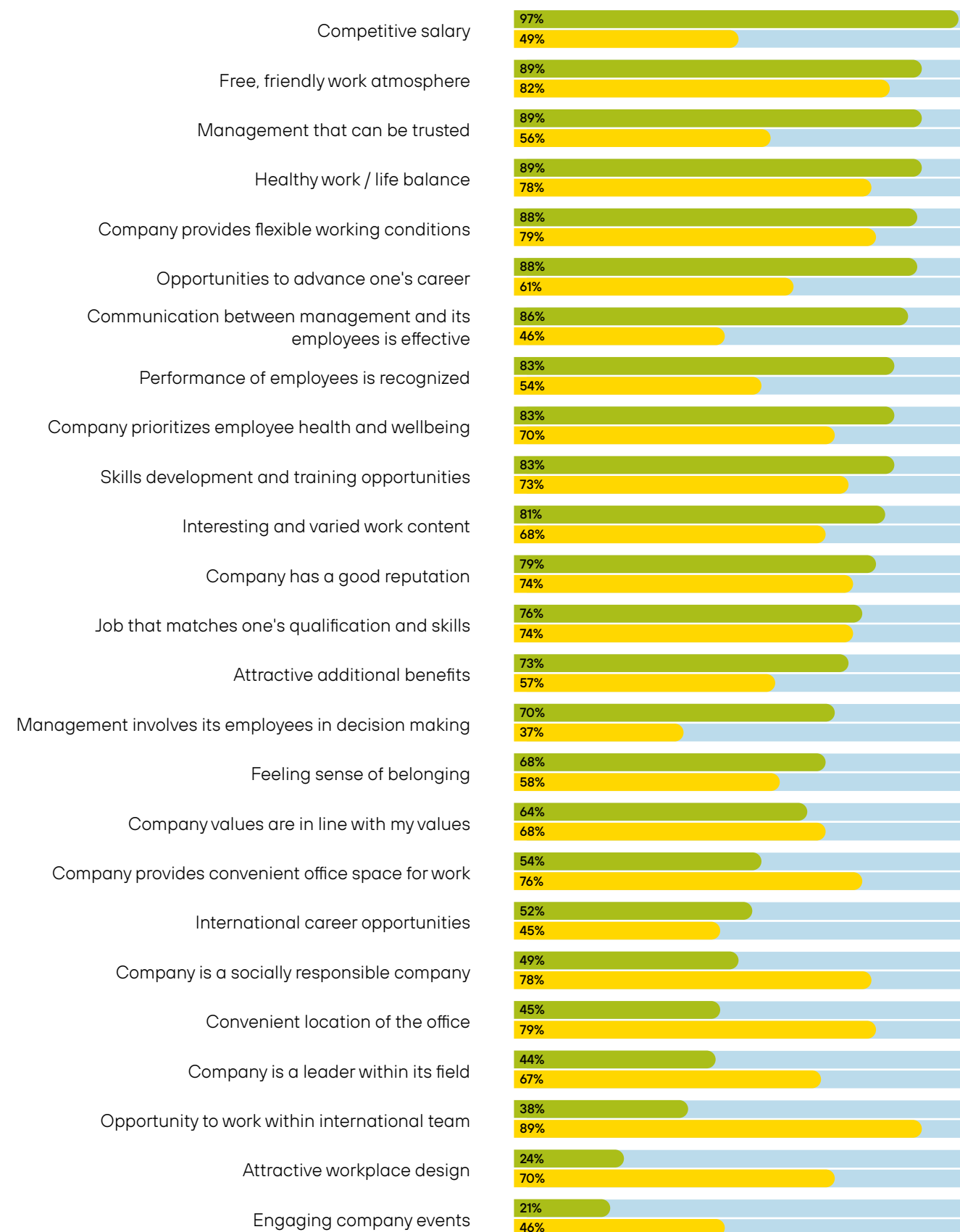
Question: Where do you most often get information about companies that you consider potential employers? (Multiple choice)
Question: Where did you first hear about the open position you applied for?
Base: Software developers and other tech specialists, n=1,454

Significance of a hybrid work policy



Question: How significantly will a hybrid work policy of a company impact your next career step?
Base: Software developers and other tech specialists, n=1,454

Comparison of criteria importance & the extent to which they are met by Employers



● Employees' preferences, n=1,454

● Employees' attribution to their employer, n=1,454

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

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

Base: Software developers and other tech specialists, n=1,454

Deep dive: finance, accounting, and compliance specialists

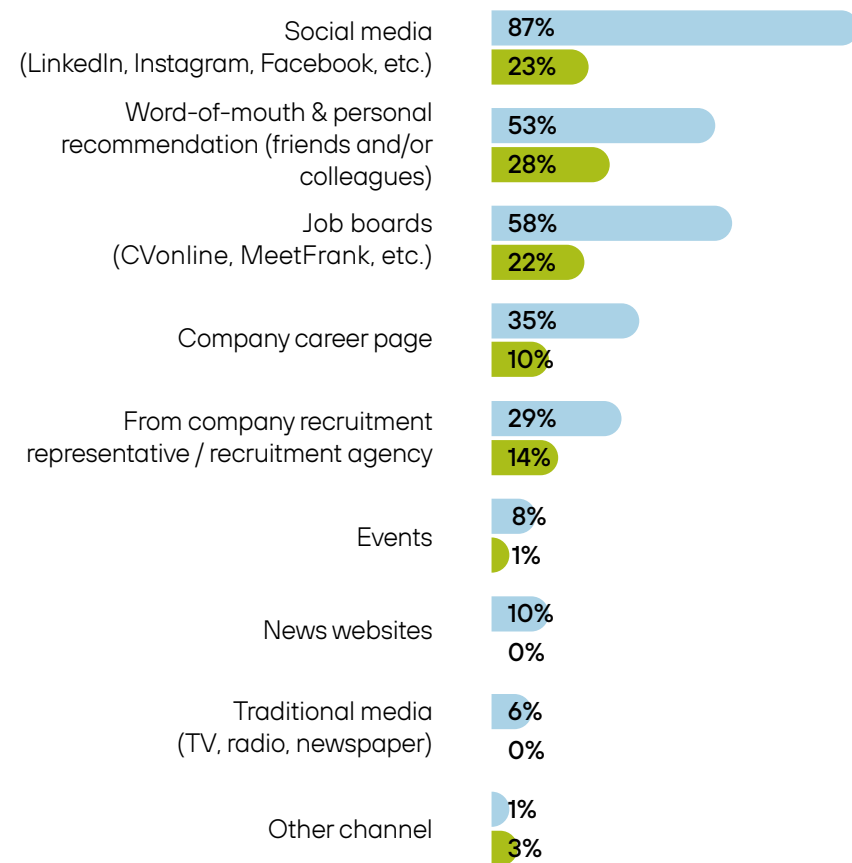
For specialists in finance, accounting and compliance fields, the employment satisfaction score is unchanged since last year, remaining at 7.7 out of 10.

Social media, meanwhile, has emerged as an increasingly effective job search channel, with engagement rising 4 percentage points and successful placements up 5 percentage points. Meanwhile, traditional job boards saw a 4 percentage point decline in placement effectiveness.

F&A and compliance professionals are showing growing sensitivity towards workplace flexibility, with the importance of flexible working conditions increasing 92% to 94% in importance. Meanwhile, trust in management dropped from second to sixth place in their priority rankings, despite minimal changes in absolute scores.



Means of finding information about employers and jobs



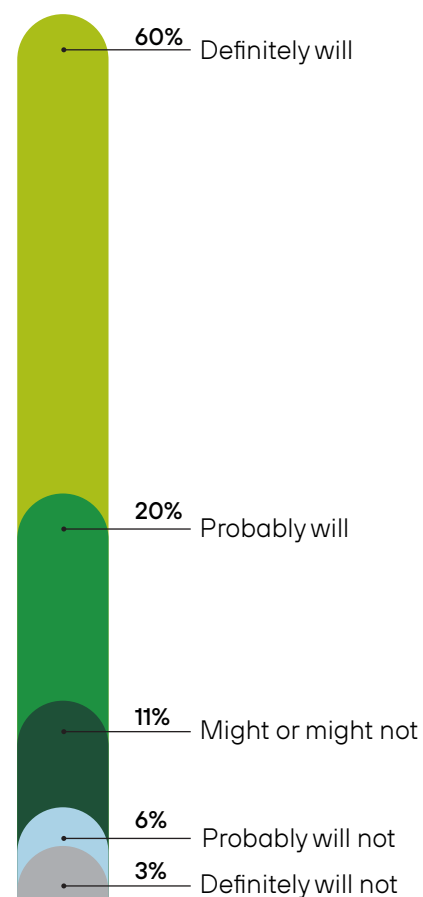
Finding information about ● employers ● open positions

Question: Where do you most often get information about companies that you consider potential employers? (Multiple choice)

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

Base: Finance, accounting, and compliance specialists, n=1,318

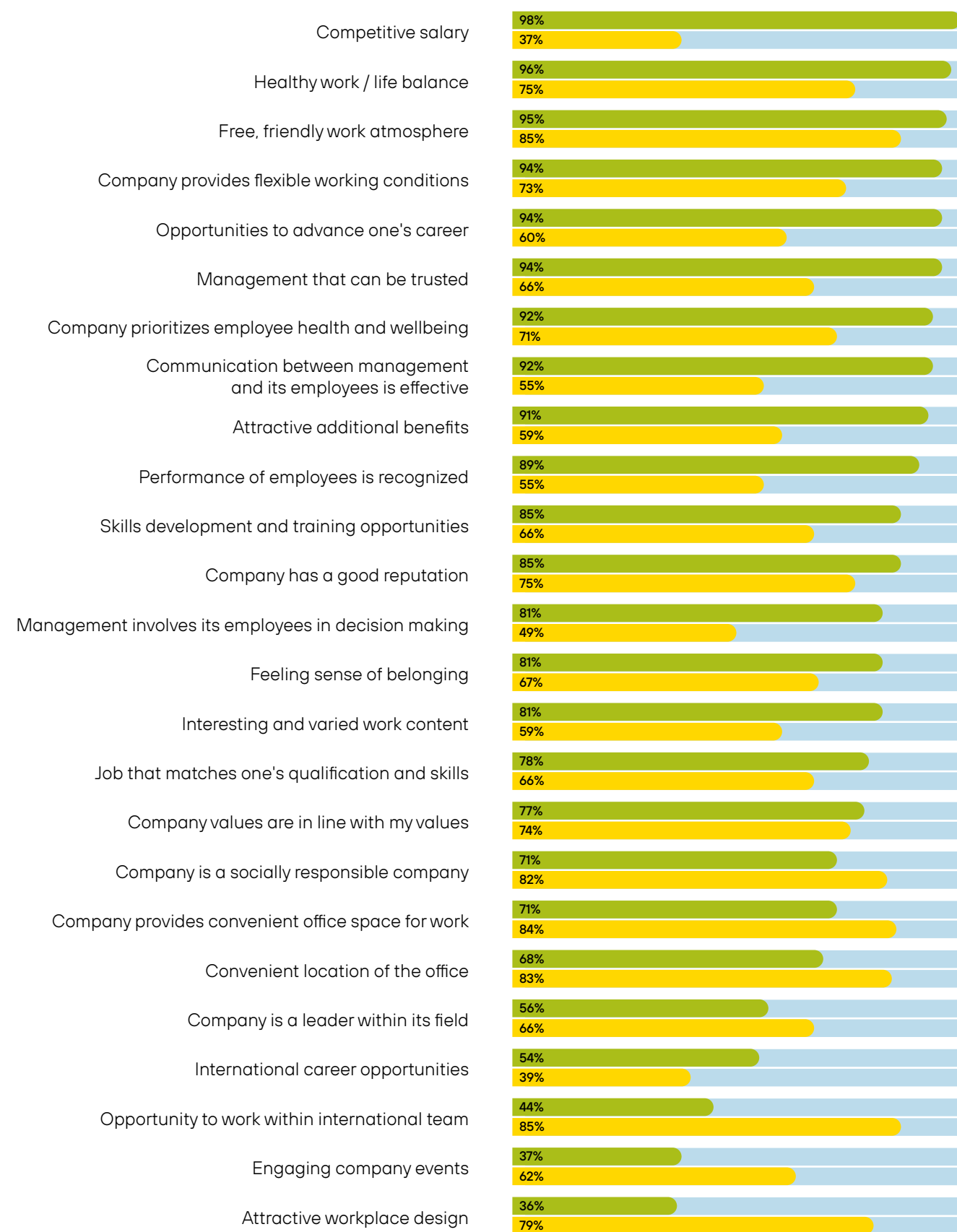
Significance of a hybrid work policy



Question: How significantly will a hybrid work policy of a company impact your next career step?

Base: Finance, accounting, and compliance specialists, n=1,318

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



● Employees' preferences, n=1,318

● Employees' attribution to their employer, n=1,318

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

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

Base: Finance, accounting, and compliance specialists, n=1,318

Deep dive: customer care and operations specialists

Employment satisfaction for customer operations specialists fell the most since last year, from 7.9 to 7.6.

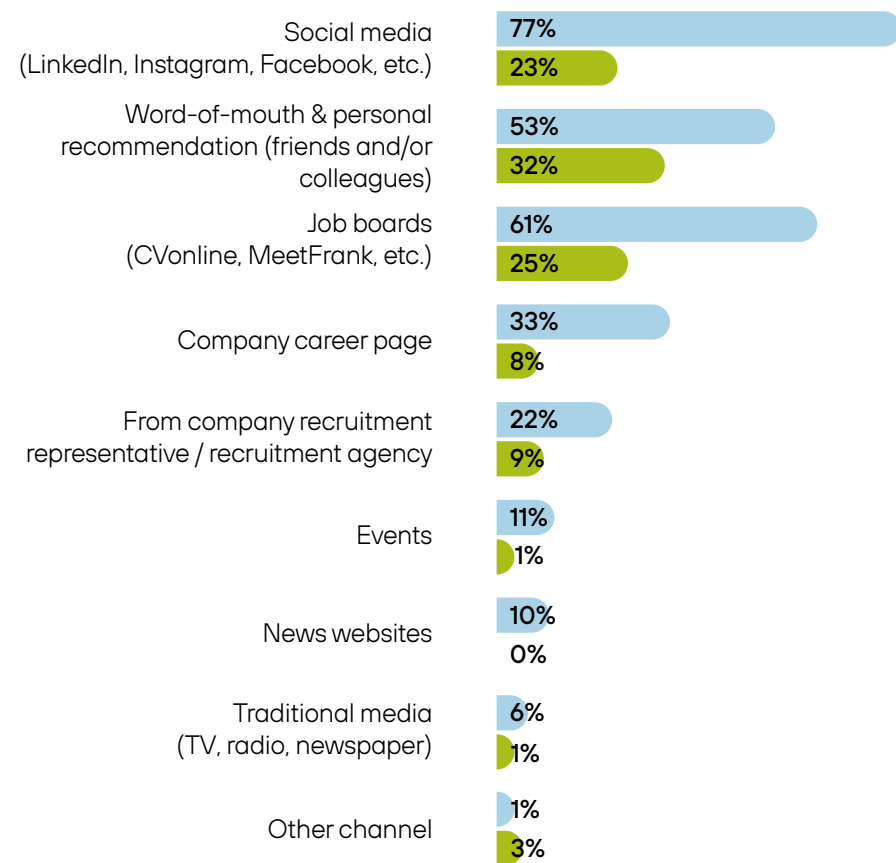
Our report found that customer operations specialists increasingly find career opportunities through social media, with recruitment success rates soaring 70% on these platforms. In contrast, job board effectiveness for this segment declined 5 percentage points.

This employee group is also similar to the F&A specialists in that any changes to hybrid work policy changes would likely affect their choices of future employment, up 1 percentage point from last year.



While there weren't many changes in importance and attribution of most criteria, there are a few exceptions. Namely, communication between management and employees was scored lower than last year, from 62% to 56%. In addition, customer operations specialists think that their performance is recognized less often than last year, as evaluation for this criterion fell from 60% in 2023 to 53% in 2024.

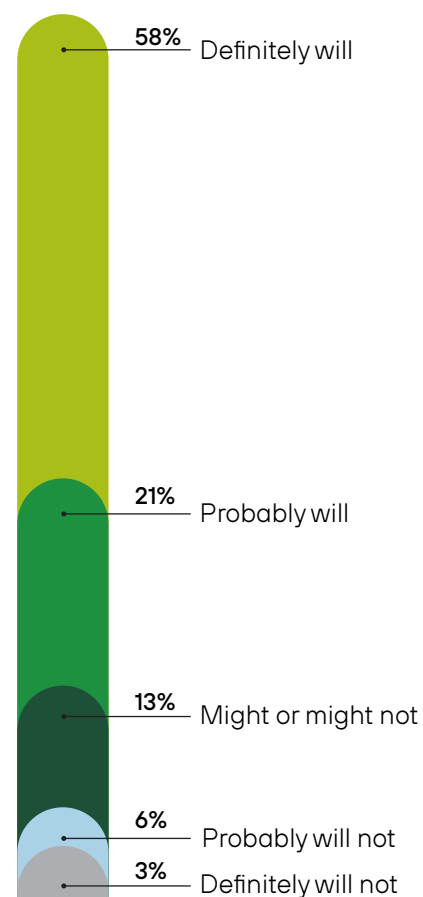
Means of finding information about employers and jobs



Finding information about ● employers ● open positions

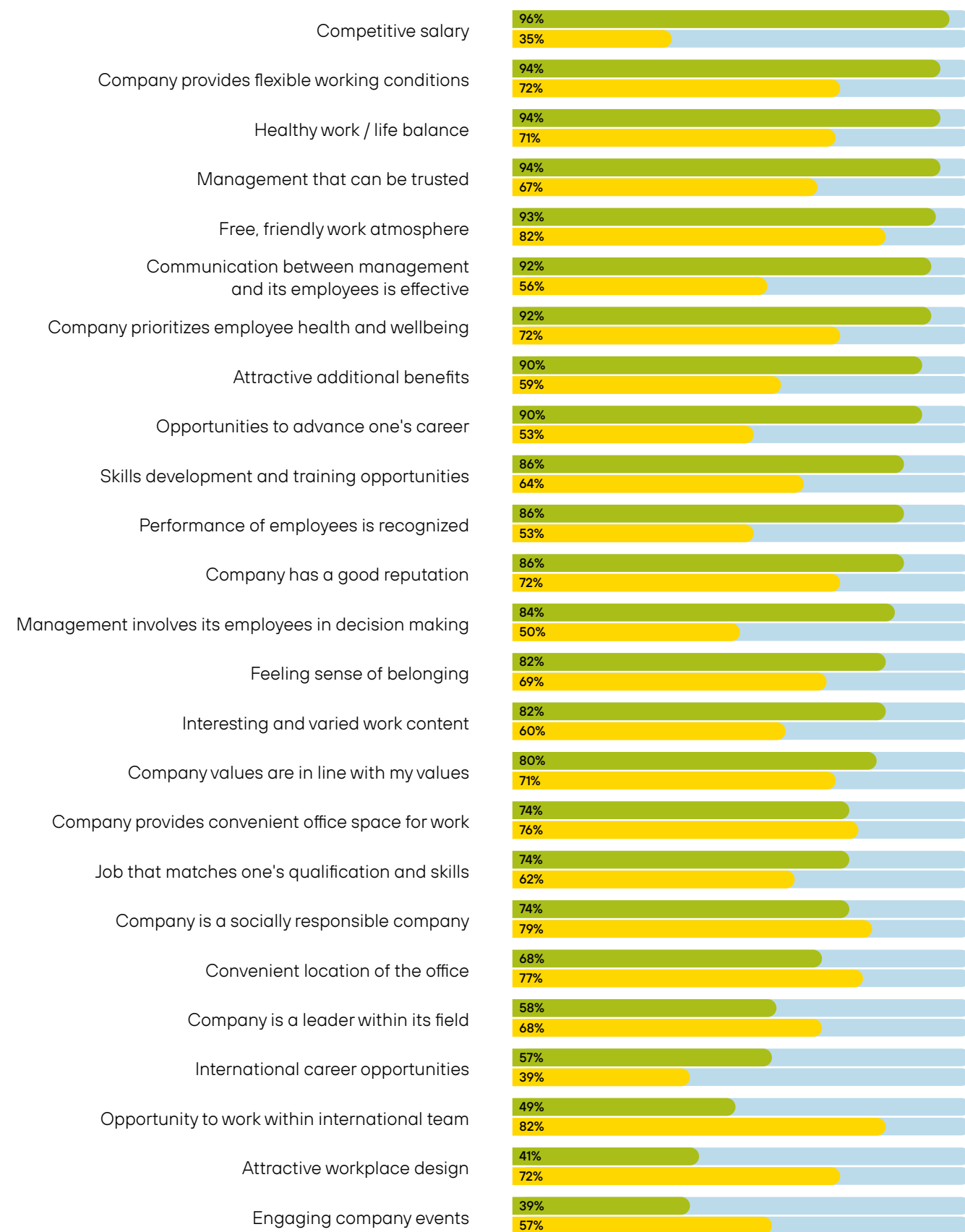
Question: Where do you most often get information about companies that you consider potential employers? (Multiple choice)
Question: Where did you first hear about the open position you applied for?
Base: Customer care and operations specialists, n=724

Significance of a hybrid work policy



Question: How significantly will a hybrid work policy of a company impact your next career step?
Base: Customer care and operations specialists, n=724

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



● Employees' preferences, n=724

● Employees' attribution to their employer, n=724

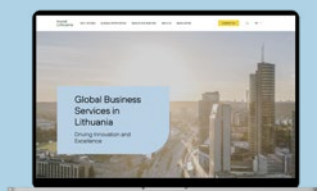
Question: How important for you are the following criteria when choosing an employer? (Only the top 2 answers ("extremely important" and "very important") shown)

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

Base: Customer care and operations specialists, n=724

Global Business Services and ICT in Lithuania

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