



Baltic Human Capital and Work Environment survey 2025





Time to rethink the strategy

I extend my sincere gratitude to all the employers and employees across Latvia, Lithuania and Estonia who contributed to this year's Baltic Human Capital and Work Environment Survey. Your insights are invaluable and form the foundation of this report. This is the first time we've run the survey across all three Baltic countries, and we're excited to continue this effort together with our regional partner, Alma Career.

Each Baltic country has its own unique economic, cultural and demographic background. Still, the survey highlights something important – they all face similar workforce challenges. Whether it's retaining talent, attracting new people or preparing for the skills of tomorrow, these issues are shared across the region. Despite the obvious nature of these challenges, many employers still don't have a long-term strategy in place. Instead, short-term fixes are often used, which don't really get to the root of the problem.

At the same time, employees are speaking up – and their message is consistent. They want to feel respected, valued and included. They're looking for workplaces that offer not just fair pay and meaningful work but also trust, a sense of belonging and equal opportunities. However, survey findings reveal that establishing inclusive workplaces remains a low priority for many employers. This gap between employee expectations and employer priorities prompts critical reflection and raises some important questions. Are employers underestimating the importance of trust? And is the push for individualisation sometimes being used in place of a real, systemic workforce strategy?

This report invites us to deeply explore these important topics. It's a call to move beyond quick fixes and think more deeply about what it really takes to build strong, inclusive and future-ready organisations in the Baltics. The survey results deliver a clear message: now is the time to embrace a people-centric mindset and a long-term vision.

Let's dive into the findings together.

Irēna Arbidāne

Director, People and Organisation lead for PwC in the Baltics



Bridging Perspectives: Aligning Employer and Employee Views on Diversity and Inclusion

Two of the most notable insights from our survey data are the lack of a strategic approach to addressing human capital and work environment issues, and a clear gap between how employers and employees in the Baltics perceive the importance of an inclusive work environment. In Latvia, this gap is particularly critical, as the country has experienced the most rapid demographic decline in the European Union over the past two decades, further intensifying the already pressing issue of talent shortages.

Rapid shifts in workforce demographics not only reshape perceptions of work and leadership but also demand new, adaptive strategies. Within this dual landscape—marked by demographic pressure and a disconnect between employers, who often undervalue the strategic importance of diversity and inclusion (D&I), and employees, who demand inclusive and equitable workplaces—the question becomes more urgent than ever: What will it take for organizations to embrace D&I as a core strategic response to the evolving challenges of human capital, leadership, and business resilience?

The report highlights:

- How employers in the Baltics assess human capital and work environment challenges and how these relate to D&I
- The extent to which these challenges are being addressed through strategic initiatives
- Employers' approaches to D&I: how they address it, implement it, and measure success
- Key factors that employers identify as critical for their organizations' future growth
- Employees' perspectives on D&I within their workplace environments

The data points to a clear trend: while both employers and employees recognize the importance of an inclusive work environment for attracting and retaining talent, it is not receiving sufficient strategic attention. The D&I perspective in addressing human capital issues remains uneven and limited. Notably, compared to other Baltic countries, employers and employees in Latvia assign less importance to an inclusive work environment.

Neglecting or minimizing the importance of D&I in workplace and organizational development risks lowering employee engagement and productivity, missing growth opportunities, and accelerating talent loss—ultimately undermining performance and competitiveness.

Let's explore the report's insights and consider what is needed to build resilient, inclusive, and future-ready organizations.

Agnese Cimdiņa

PhD, Head of Diversity and Inclusion Practice in the Baltics, PwC



Core insights

Core insights from an employer's perspective

- While employers acknowledge the critical importance of talent acquisition, innovation and effective leadership in securing long-term growth, a considerable gap persists between the recognition of this and coherent strategic action.
- Diversity and inclusion (D&I) initiatives are not yet widely implemented across organisations, indicating that many employers are still in the initial stages of building inclusive environments.
- Employers focus on more immediate and short-term tangible outcomes for employees, potentially overlooking the broader, long-term strategic advantages of a truly inclusive work environment.
- Employers across the Baltic states often lack a clear, data-driven understanding of their current workforce landscape.
- Approaches to dealing with D&I challenges in each Baltic state are different, inconsistent and largely underprioritised.

Latvia

Limited strategic approach: 19% of respondents acknowledge that they have a strategy to address human capital challenges.

D&I practice on paper: fragmented and limited emphasis on building foundational infrastructure for D&I, such as HR support, reporting mechanisms, strategy development, and training programmes (12–16%).

Challenges with productivity: challenges on linking the D&I environment to productivity (15%).

Scepticism in theory and practice: the lowest recognition of the crucial role that inclusivity plays in attracting and retaining talent (70%), only 16% actively prioritise D&I work.

Lithuania

Least strategic approach: only 15% of respondents have a strategy in place to address human capital challenges.

More focus on conflict resolution than systemic HR support: only 3% focus on building foundational infrastructure for D&I, such as HR support, while 14% focus on conflict resolution.

Limited understanding of challenges: a knowledge gap (20%) on how to create an inclusive work environment.

Failure to recognise: despite acknowledging the importance of inclusivity in attracting and retaining talent (91%), only 6% actually prioritise it.

Estonia

Most strategic approach: 31% of respondents have a strategy in place to address human capital challenges.

Prioritisation of individual development: among fragmented D&I initiatives, most focus on conflict resolution, coaching and mentoring (16%), alongside HR support and reporting mechanisms (13%).

Possibly unaware of challenges: fewest challenges of an inclusive work environment reported, with 20% reporting no challenges.

Recognised in theory, neglected in practice: the majority of Estonian employer respondents recognise the crucial role that inclusivity plays in attracting and retaining talent (95%), but only 18% actually prioritise it.

Core insights from an employee's perspective



High importance of inclusivity

The majority of Baltic employees (94%) recognise the importance of an inclusive work environment at the workplace.



Diverging perceptions of priorities

In Latvia, the perceived importance of diversity and inclusion (D&I) in employer selection varies significantly across different employee demographic groups. Notably, 18% of both young adults (aged 18–29) and older individuals (aged 60+) do not consider D&I a key factor when choosing an employer – substantially higher than in Lithuania (5%) and Estonia (6%). This trend is even more pronounced among Latvian men, with 33% indicating that D&I is not a priority in their choice of employer, compared to just 0% in Lithuania and 8% in Estonia. These findings suggest that D&I initiatives in Latvia may not resonate equally across all segments of the workforce – particularly among younger and older workers, as well as men.



Preferences observed

Across all three Baltic countries, employees report a noticeable employer preference for younger candidates (Latvia 29%, Lithuania 16%, Estonia 30%).



Conflict resolution and discrimination management

Approximately one-third of Baltic employees express dissatisfaction with the handling of conflict and discrimination in their workplaces.



Learning skills

In the Baltic region, employees prefer to improve necessary skills and knowledge for job performance and career growth for the next five years through informal educational activities like workshops, courses and self-study – Latvia (26%), Lithuania (24%) and Estonia (22%). 13–15% seek to enhance professional qualifications through academic studies.



Talent Drain

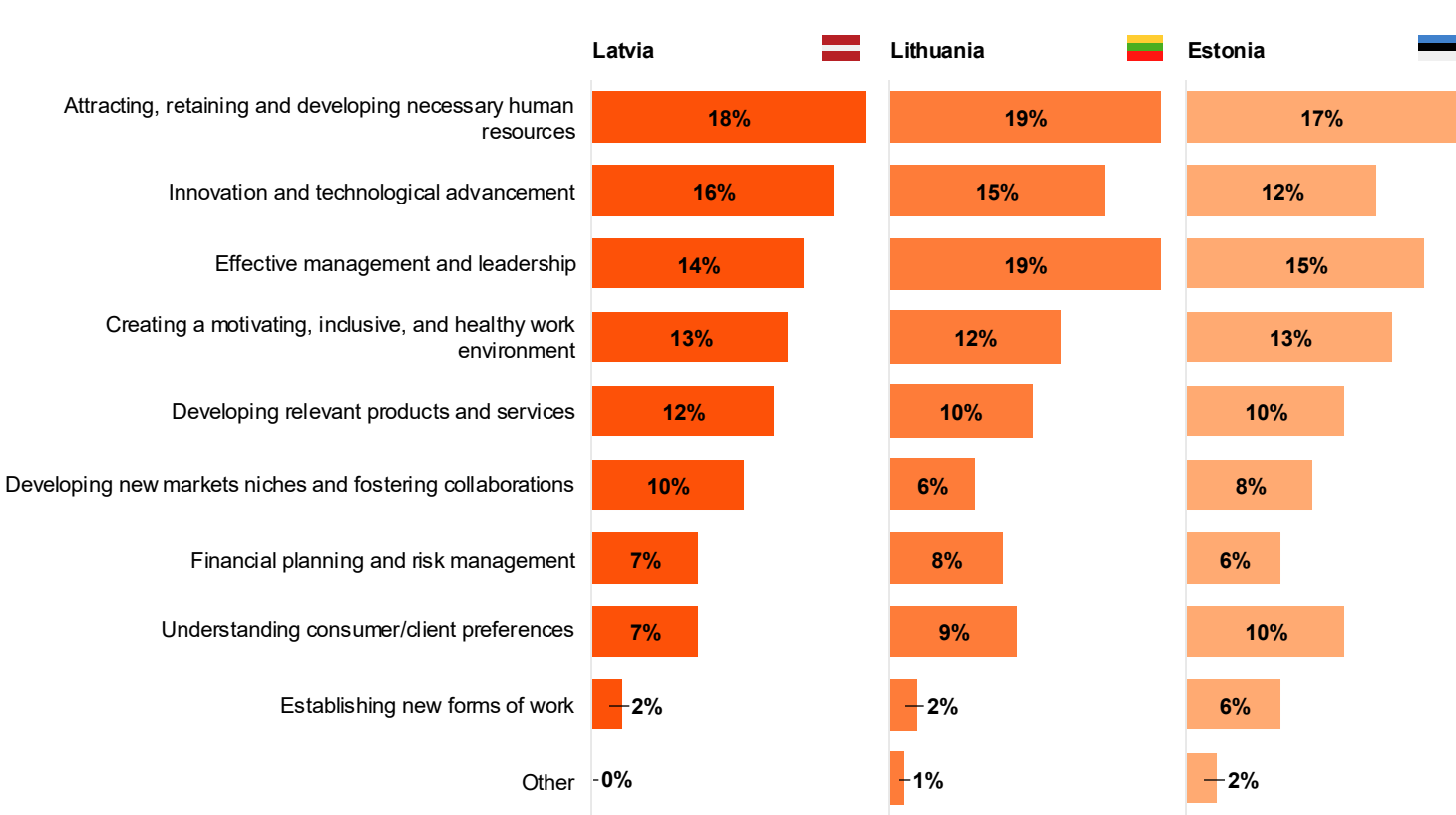
Lack of inclusivity and equal opportunities contribute to significant talent loss across the Baltic region. Due to a lack of fair growth opportunities and an insufficiently inclusive work environment, 62% of employees in Lithuania, 75% in Estonia and 62% in Latvia have considered leaving or have already left the current workplace.

Employer's perspective

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Human resources are a top priority for future growth

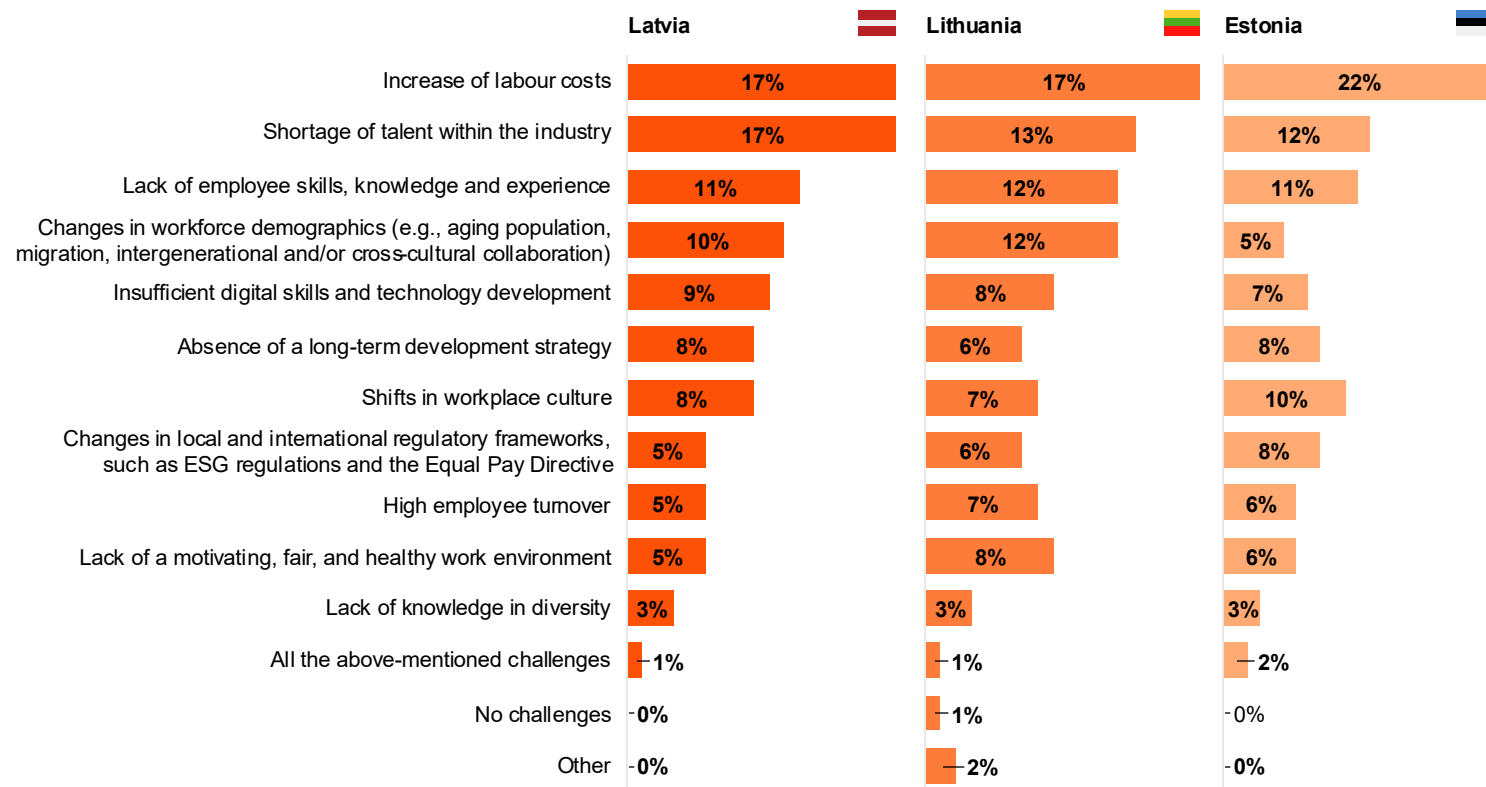
Q. Please rank the following factors according to their significance for the future growth of your organisation



When it comes to the future growth of the organisation, **attracting, retaining and developing necessary human resources** is ranked as the most significant factor for future growth across all three Baltic countries (18% in Latvia, 19% in Lithuania and 17% in Estonia). In addition to human capital priorities, several other factors are also highlighted as essential for future growth. **Innovation and technological advancement** are viewed as particularly important in Latvia (16%) and Lithuania (15%), followed by Estonia (12%). **Effective management and leadership** is another key priority, especially in Lithuania, where nearly one in five employers (19%) consider it crucial, compared to 14% in Latvia and 15% in Estonia. The importance of **creating a motivating, inclusive and healthy work environment** is also emphasised consistently across the region, with similar levels of recognition (in Latvia and Estonia 13%, in Lithuania 12%). Finally, the **development of relevant products and services** is seen as a noteworthy success factor by 12% of employers in Latvia and 10% in both Lithuania and Estonia.

Organisations in the Baltic states are facing a combination of challenges related to talent acquisition, skill development, labour costs, and demographic changes

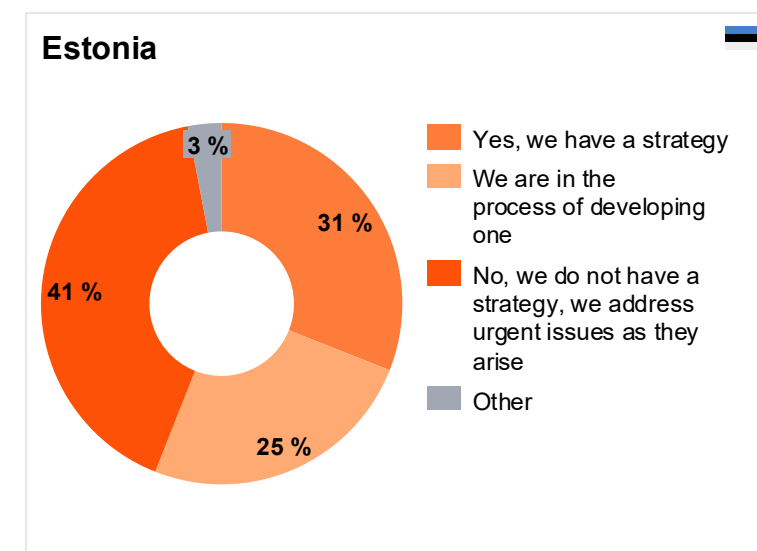
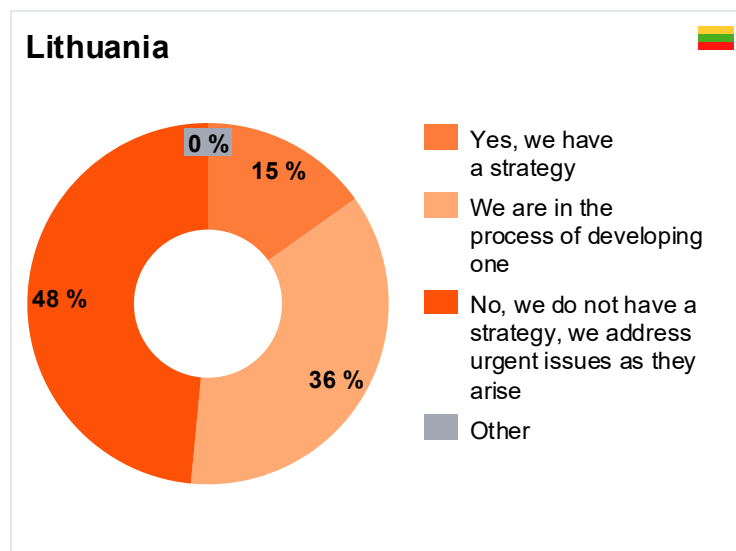
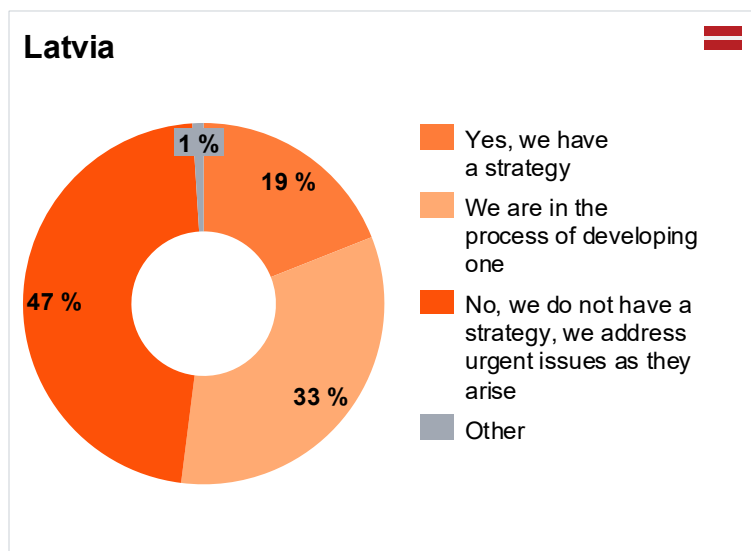
Q. From a human resources perspective, what challenges will your organisation most likely face in the next 5 years?



Across the Baltic countries, employers have indicated several main challenges – **increase in labour costs** (Latvia 17%, Lithuania 17% and Estonia 22%), **shortage of talent within the industry** (Latvia 17%, Lithuania 13% and Estonia 12%), as well as **lack of employee skills, knowledge and experience** (Latvia and Estonia 11%, Lithuania 12%). **Changes in workforce demographics** are also considered as a challenge by employers in Latvia and Lithuania, with 10% of respondents in Latvia and 12% in Lithuania highlighting this issue. In contrast, only 6% of respondents in Estonia view it as a key concern. However, Estonian employers are more likely to perceive **changes in workplace culture** as one of the main challenges their organisations may face over the next five years — an issue that is less frequently mentioned by employers in Latvia (8%) and Lithuania (7%). The increasing labour costs, shortage of talent and lack of necessary skills are not just future-day concerns but present-day realities that demand immediate attention.

The strategic emphasis on addressing human capital challenges remains uneven and relatively limited

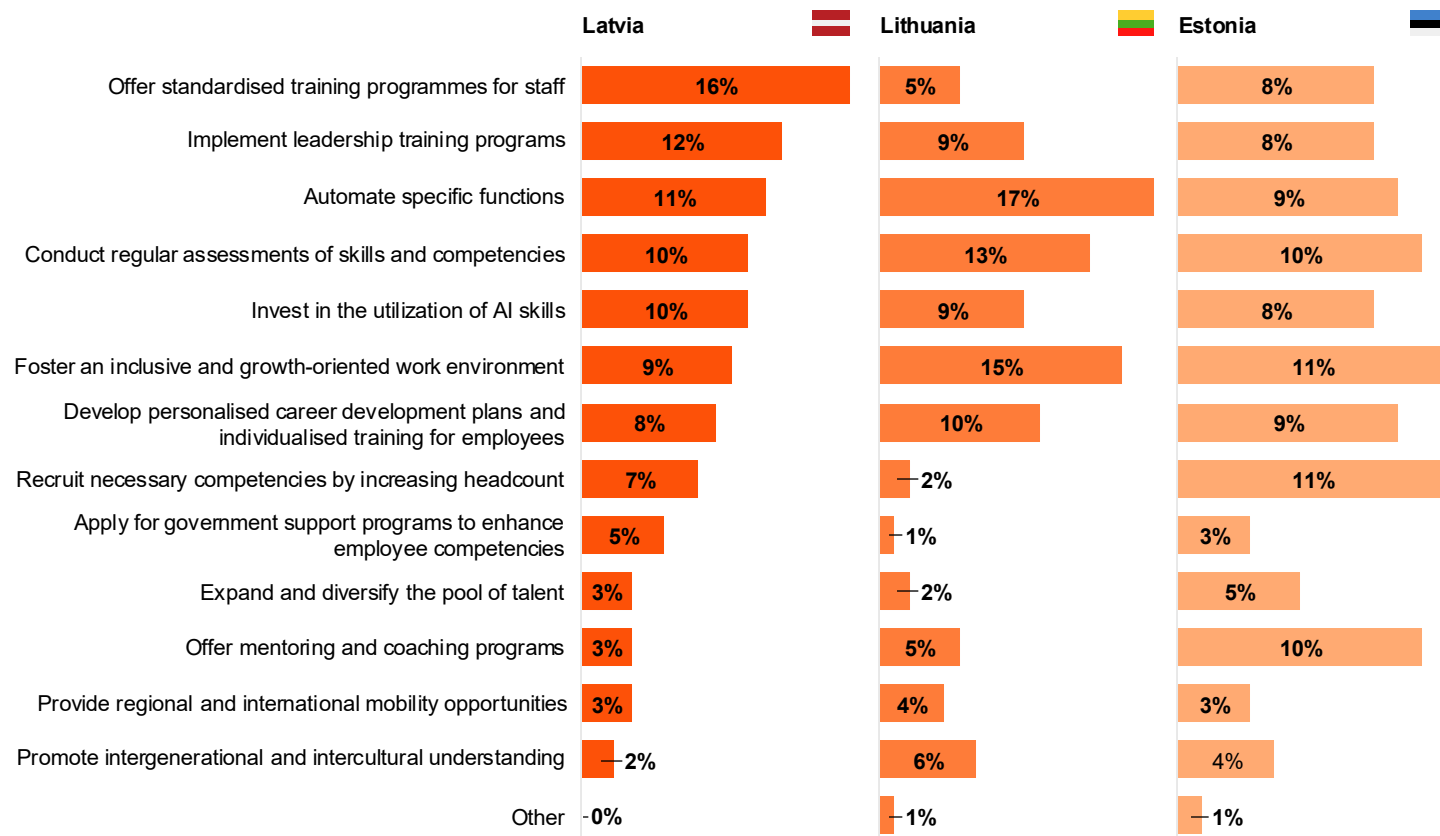
Q. Does your organisation have a strategy to address human capital challenges?



Data reveal varied stages of strategic planning across the Baltics. In Latvia and Lithuania, less than 20% of surveyed organizations acknowledge having developed strategies. **Almost half of Baltic employers are planning to address human capital challenges as they arise.** 48% in Lithuania, 47% in Latvia and 41% in Estonia – organisations are planning to proactively address future human capital challenges as they arise. While Estonia demonstrates a higher prevalence of existing strategies (31%), Lithuania (36%) and Latvia (33%) are actively engaged in developing new strategies. This suggests that while Estonian employers may be slightly ahead in terms of having established strategies, organisations in Latvia and Lithuania are actively catching up, signalling a growing recognition of the need for forward-looking human capital planning across the region.

Employers are investing in dual strategies: automating routine functions and simultaneously building inclusive workplaces

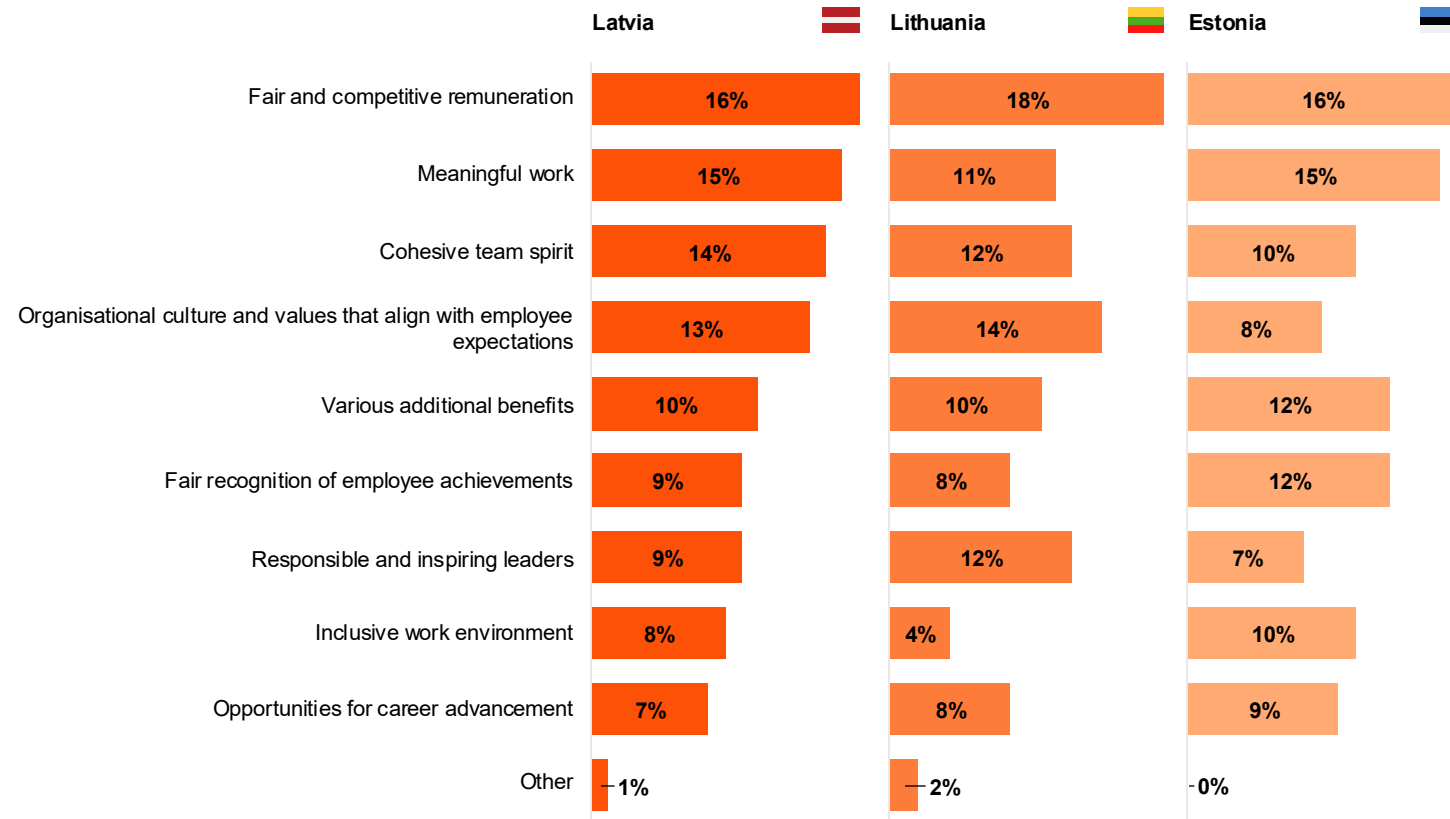
Q. How does your organisation foster the development of competencies and skills to meet future demands?



To ensure the development of the skills and competencies needed to meet future workforce demands, **employers in Latvia primarily focus on offering standardised training programmes** — both for general staff (16%) and at the management level (12%). Additionally, 11% of Latvian employers report automating specific functions as part of their strategy. **In Lithuania, the most common approach is function automation** (17%), while **employers in Estonia place greater emphasis on creating an inclusive, growth-oriented work environment** (11%) and **recruiting new employees with the necessary skill sets** (11%). Building an inclusive and growth-oriented work environment is also a priority for a notable share of Lithuanian respondents (15%), while in Latvia, this approach is emphasised by only 9% of surveyed organisations.

Supportive and value-driven environment recognised as loyalty factors

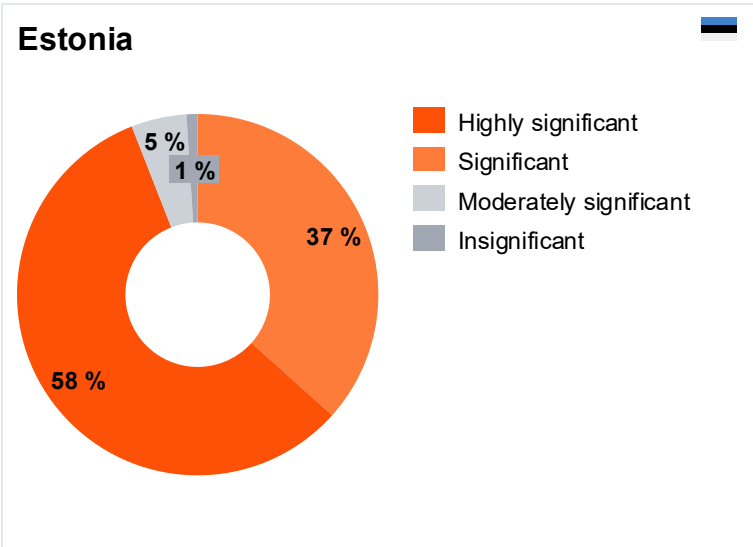
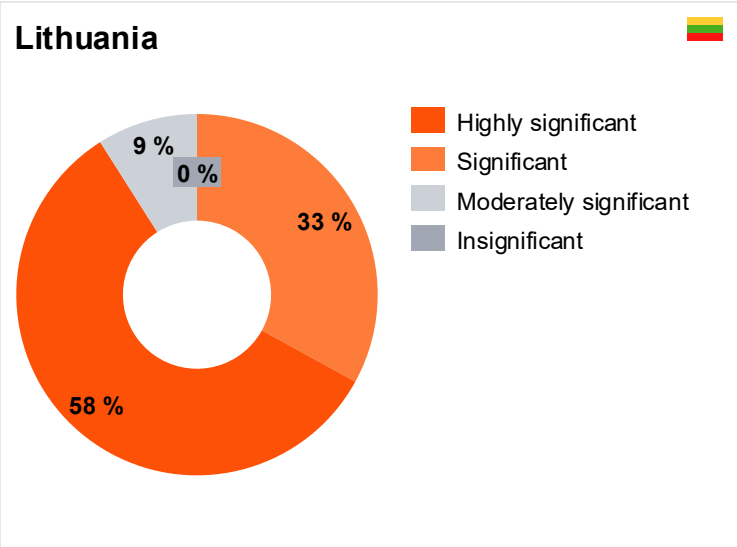
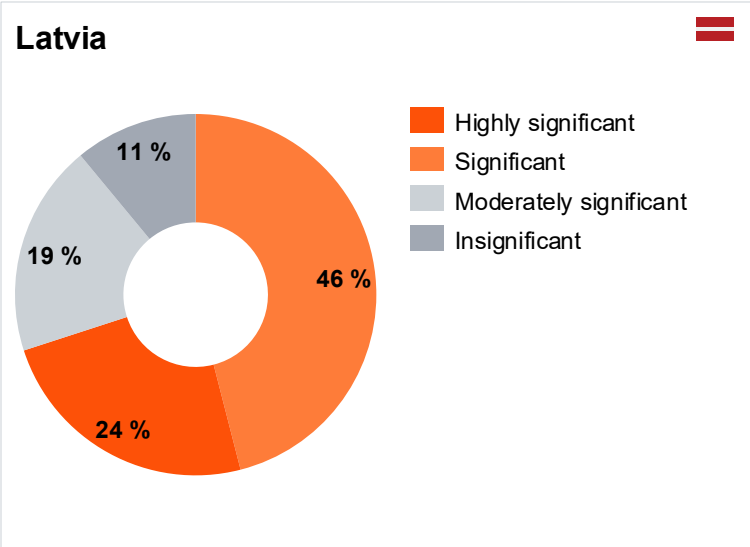
Q. What do you consider to be the primary factors that sustain employee loyalty in your organisation?



Across the Baltic countries, **fair and competitive remuneration** (Latvia 16%, Lithuania 18% and Estonia 16%) and **meaningful work** (Latvia 15%, Lithuania 11% and Estonia 15%) stand out as the primary drivers of employee loyalty from the point of view of employers. According to the surveyed employers, factors such as **a cohesive team spirit** (Latvia 14%, Lithuania 12% and Estonia 10%) and **aligned organisational culture and values** also play an important role in fostering employee loyalty. Aligned organisational culture and values appears to be more important to respondents in Latvia (13%) and Lithuania (14%), while in Estonia, it is noted by 8% of employers. Instead, Estonian respondents place greater emphasis on **various additional benefits** (12%) and an **inclusive work environment** (10%) as more important drivers of employee loyalty.

Inclusive work environment is considered important in attracting and retaining talent

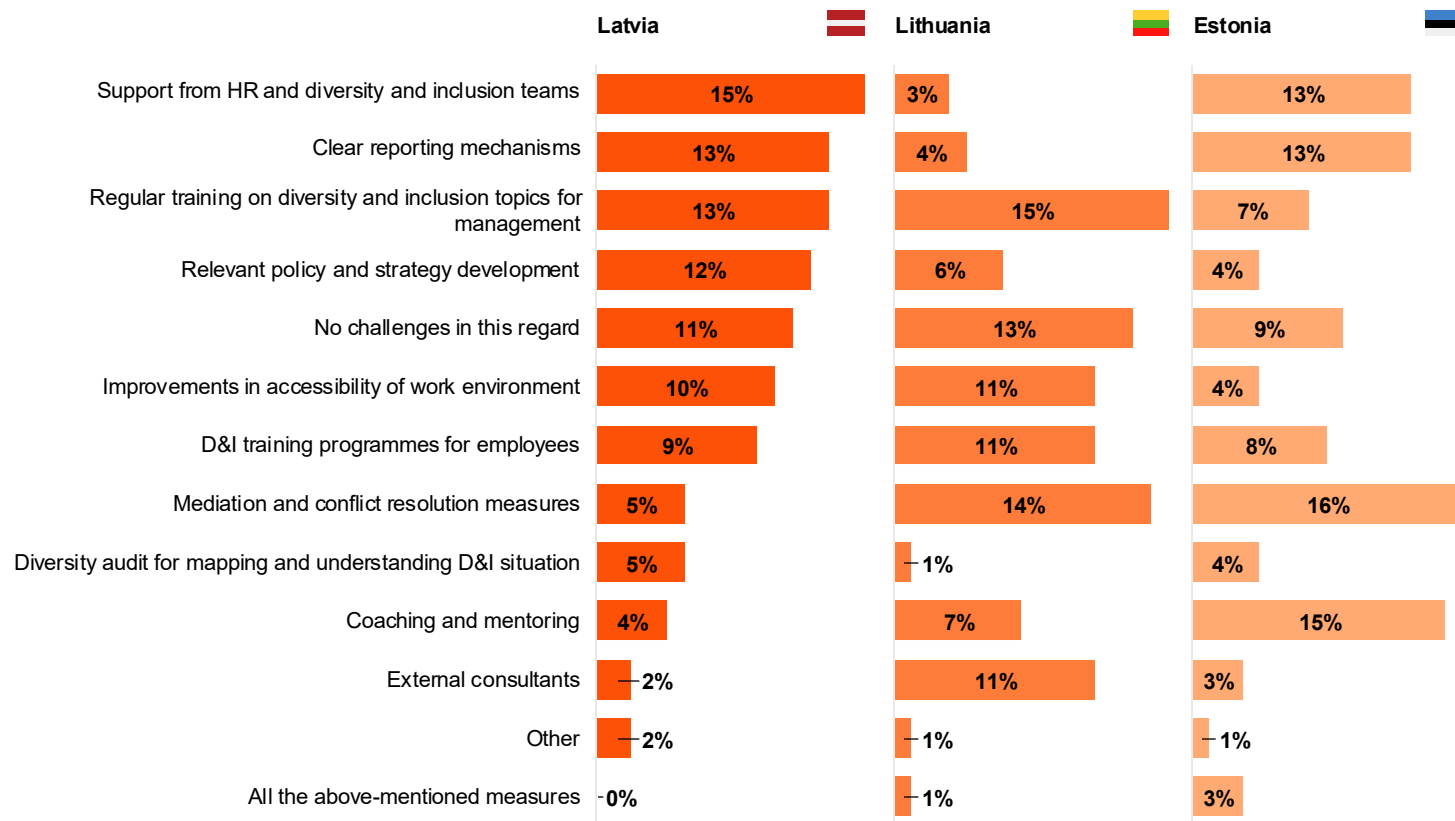
Q. How do you assess the role of an inclusive work environment in attracting and retaining talent in your organisation?



The majority of surveyed employers in the Baltic states recognise that **the role of an inclusive work environment in attracting and retaining talent is significant or even very significant**. 70% in Latvia, 91% in Lithuania and 95% in Estonia recognise the crucial role that inclusivity plays in talent management (combining ‘significant’ and ‘highly significant’ responses). In Latvia, 11% of employers **consider an inclusive work environment to be insignificant in attracting and retaining talent**. This represents the highest number among the Baltic states, with only 1% in Estonia and 9% in Lithuania reporting the same.

Approaches and priorities differ in each country

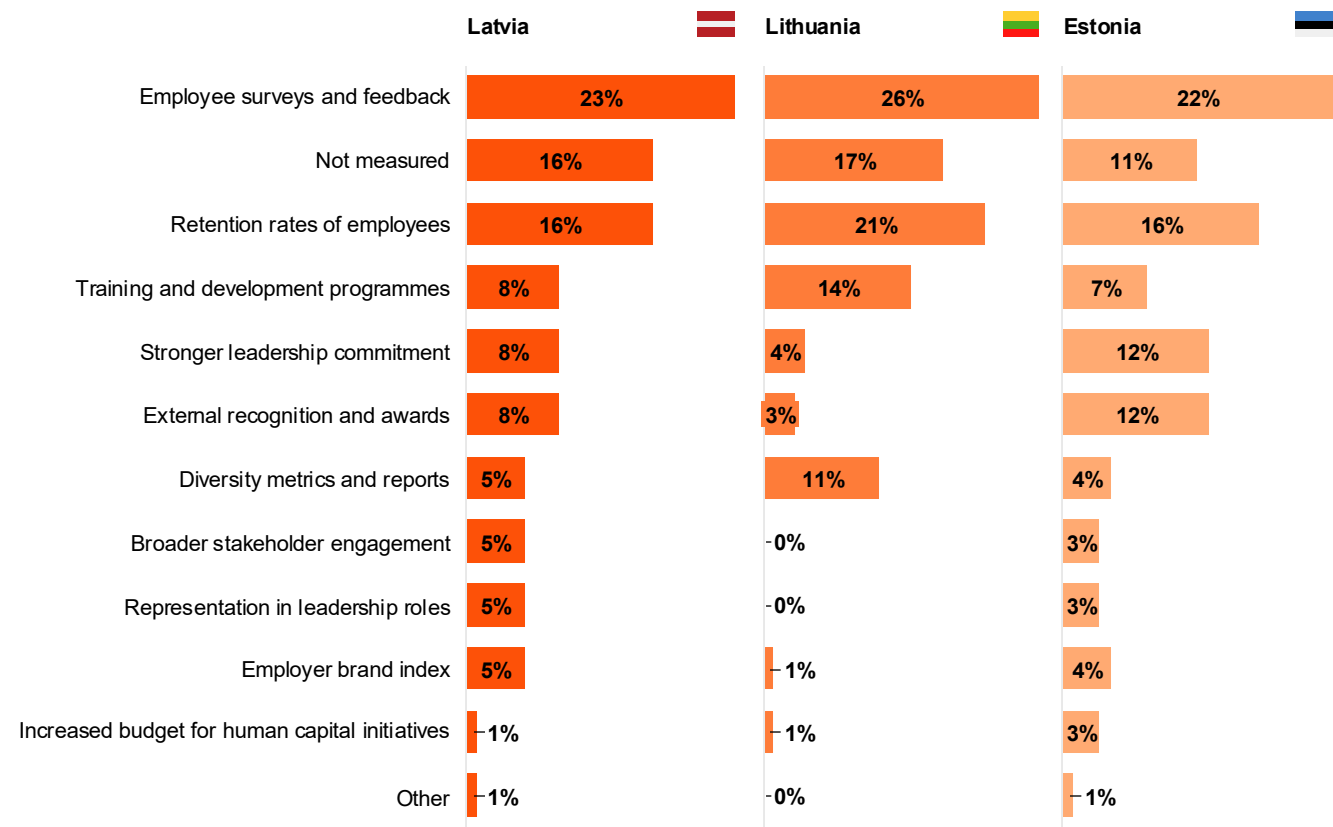
Q. How does your company address challenges related to diversity and inclusion?



Diversity and inclusion (D&I) remain relatively low on the agenda for many employers across the Baltic states, with only a small share of respondents actively prioritising key D&I initiatives. In Latvia, efforts to build the foundational infrastructure for D&I – such as **dedicated HR support, reporting mechanisms, strategy development, and training programmes** – are limited, with only 13% to 16% of respondents indicating a focus in these areas. **In Lithuania, D&I efforts are somewhat more concentrated on training for managers and conflict resolution**, also ranging between 14% and 16%. **Estonian employers show a slightly more holistic approach, with a focus on conflict resolution, HR support and individual development**, often complemented by established **support structures such as coaching, mentoring and employee support networks**. Even so, the share of organisations actively engaged in these efforts remains modest (13%–16%). One of the least addressed areas across all three countries is the use of diversity audits to assess and understand the current state of D&I within organisations. The lack of attention to such audits suggests that many employers in the Baltics may **lack a structured or data-driven understanding of their existing D&I landscape**.

The measurement of D&I success is partially applied

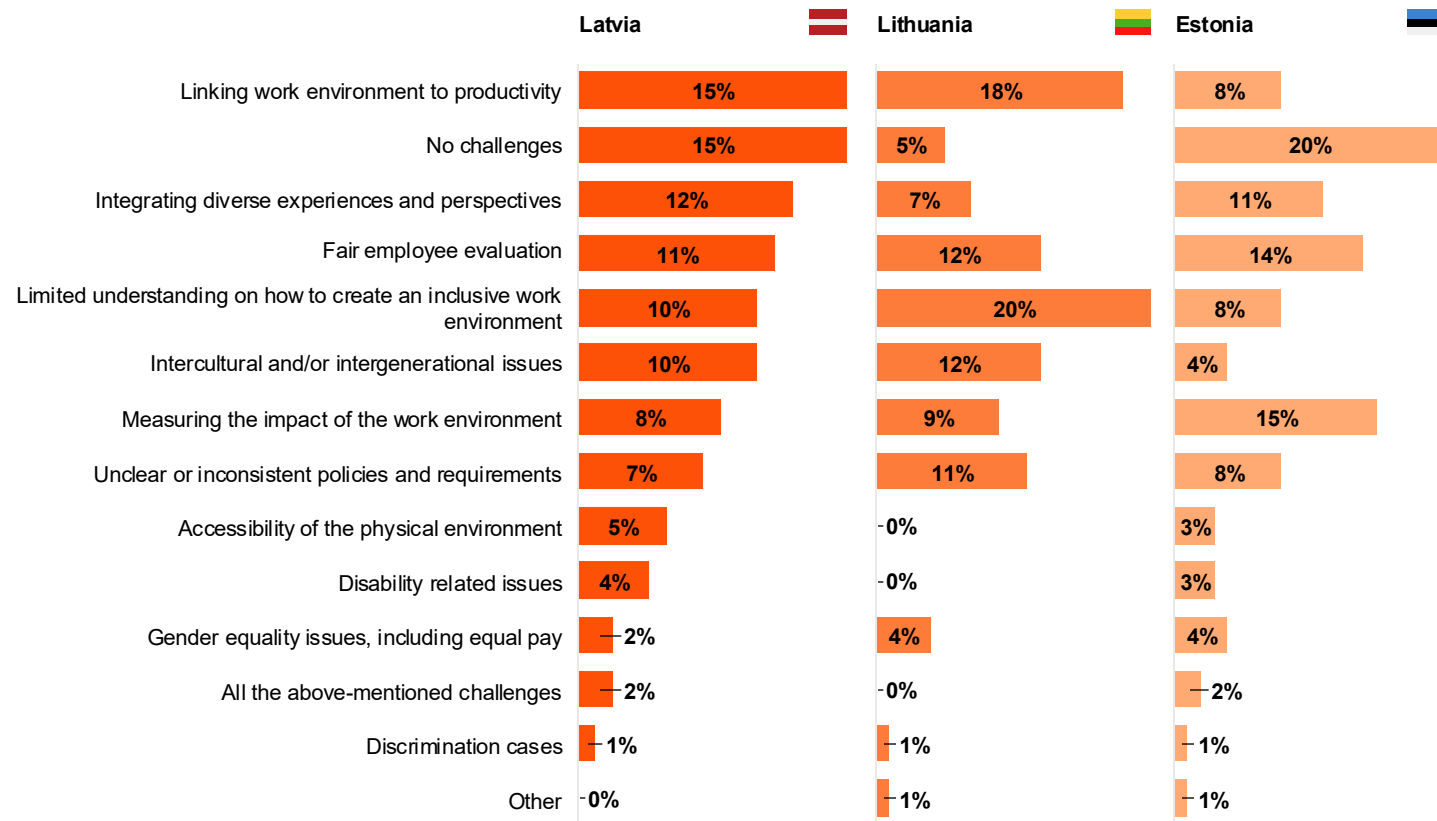
Q. How does your company measure success in terms of workforce diversity and inclusion?



The survey shows that **employee surveys and feedback** are the most popular method for assessing diversity and inclusion efforts across all three Baltic states (23% in Latvia, 26% in Lithuania, 22% in Estonia). **Retention rates of employees** is the second common method (16% in Latvia, 21% in Lithuania, 18% in Estonia). **Training and development programmes** are the third used method (8% in Latvia, 14% in Lithuania, 7% in Estonia). A notable share of organisations in each country indicate that they are not currently measuring the impact of their diversity and inclusion initiatives at all (16% in Latvia, 17% in Lithuania, 11% in Estonia). This highlights a significant opportunity for organisations across the Baltics to adopt more structured and data-driven approaches in evaluating the effectiveness of their D&I efforts.

Different stages of D&I maturity across the Baltics

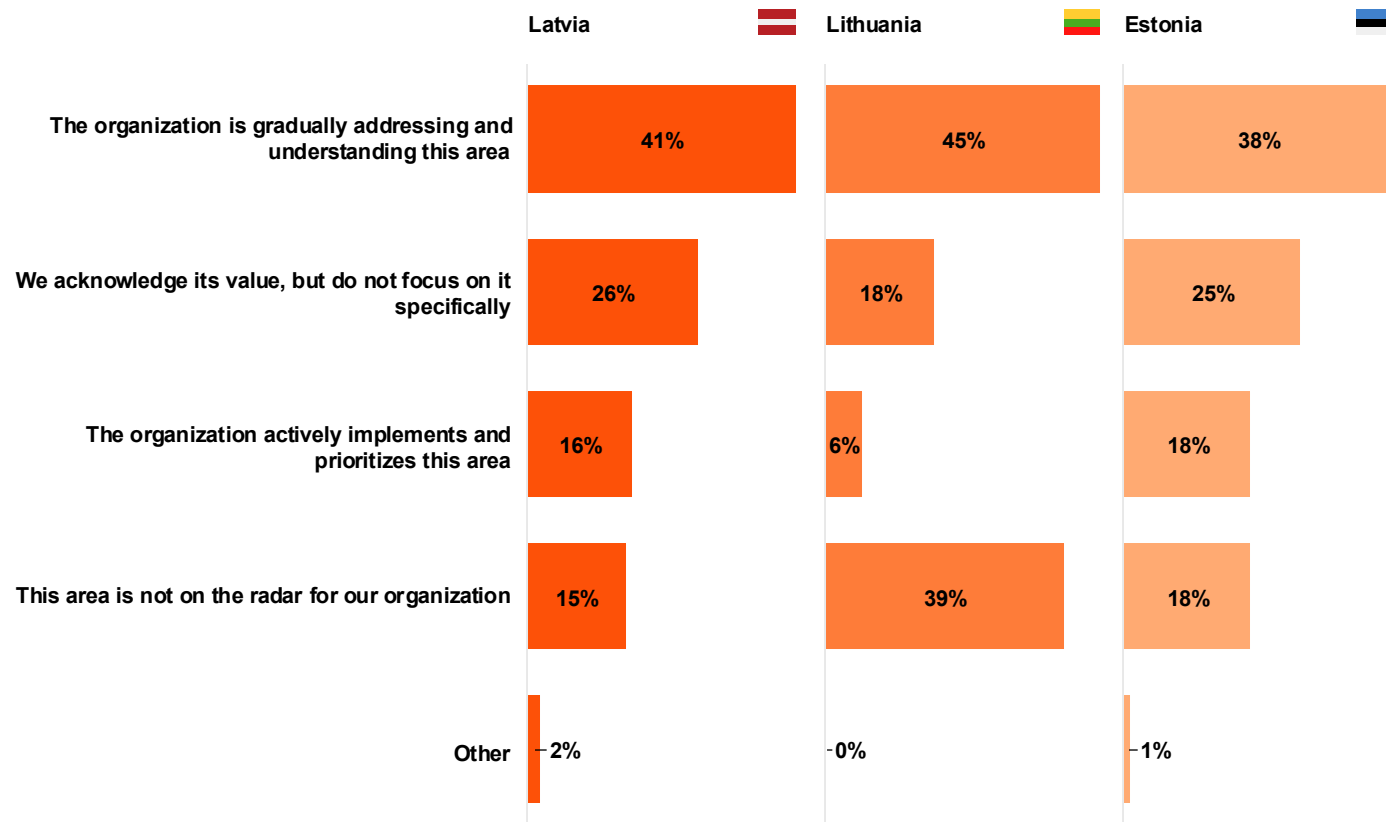
Q. Which work environment issues currently pose the greatest challenges for your organisation?



The main challenges in creating inclusive work environments differ across the Baltic states. **Employers in Estonia report the fewest obstacles overall**, with one in five (20%) indicating that they face no significant challenges in this area. In contrast, **respondents in Lithuania most commonly point to a limited understanding of how to create an inclusive work environment** (20%), suggesting a need for more guidance and practical tools. **In Latvia, the primary challenge lies in linking the work environment to productivity**, as noted by 15% of respondents. Notably, challenges related to discrimination, gender equality and disability inclusion are mentioned less frequently across all three countries, indicating that these issues may not yet be fully recognised or prioritised by many organisations in the region.

D&I is not a strategic priority for many organisations in Baltics

Q. How would you describe your organisation's approach to diversity management and creating an inclusive work environment?

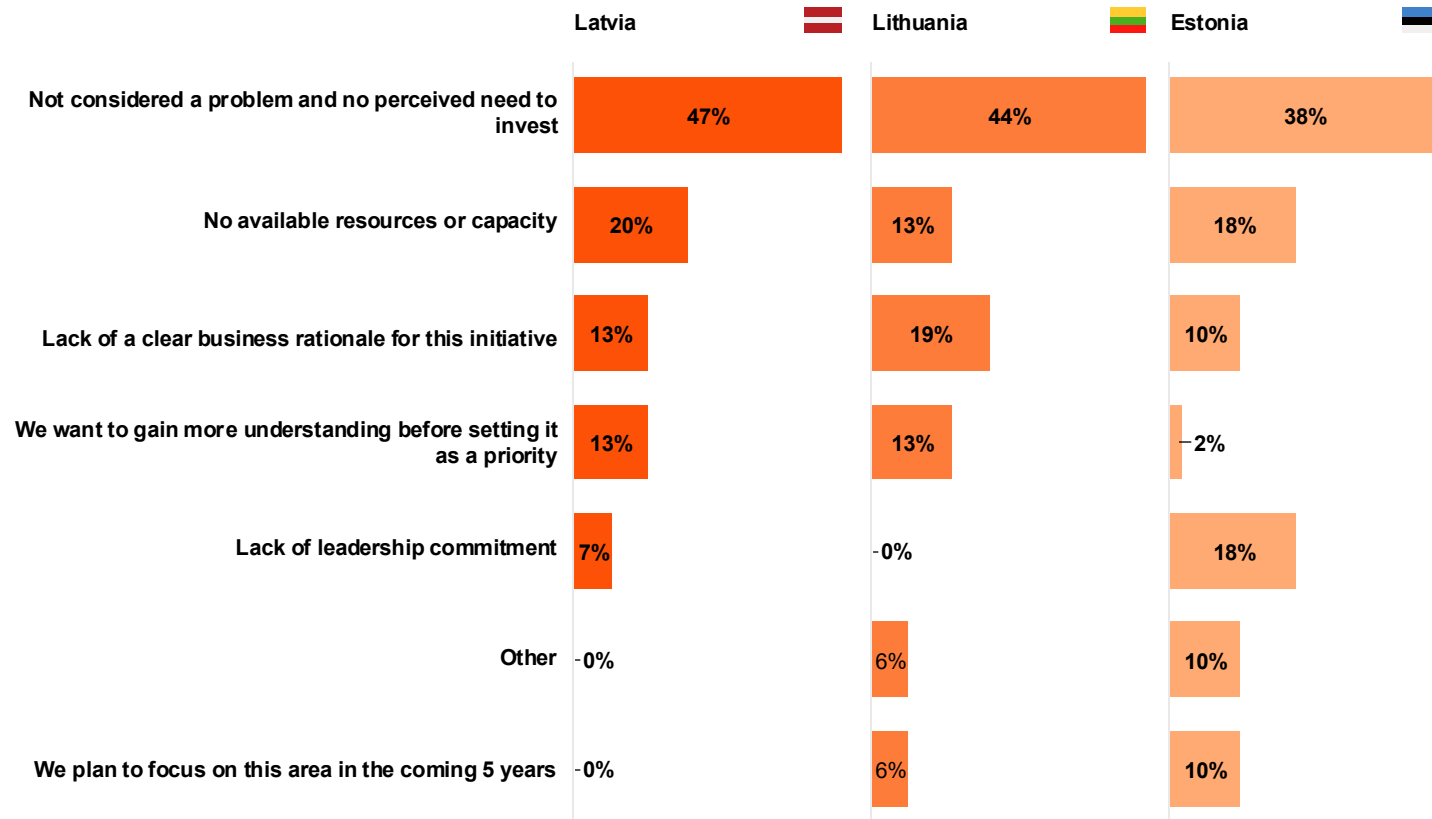


Across the Baltic states, diversity and inclusion (D&I) remain areas in development for many organisations. 41% of surveyed organisations in Latvia, 46% in Lithuania and 33% in Estonia are in the process of **gradually addressing and building awareness** of D&I, suggesting that a large share of employers are still in the early stages of understanding and engagement. A smaller proportion of organisations actively implement and prioritise D&I efforts. Estonia leads in this regard, with nearly one in five organisations (18%) taking an active and strategic approach. Latvia follows with 16%, while in Lithuania, only 6% of organisations report the same level of commitment, indicating room for further progress. 30% of respondents in Lithuania state that D&I is “not on the radar”, while in Latvia and Estonia, a smaller share of respondents hold the same view – 16% and 18%. These findings highlight the need to raise awareness and build the capacity of organisations to move from recognition to action in managing diversity and fostering inclusive work environments.

Cautious approach

Q. What are the reasons why diversity management and inclusive work environment issues are not prioritised in your organisation?*

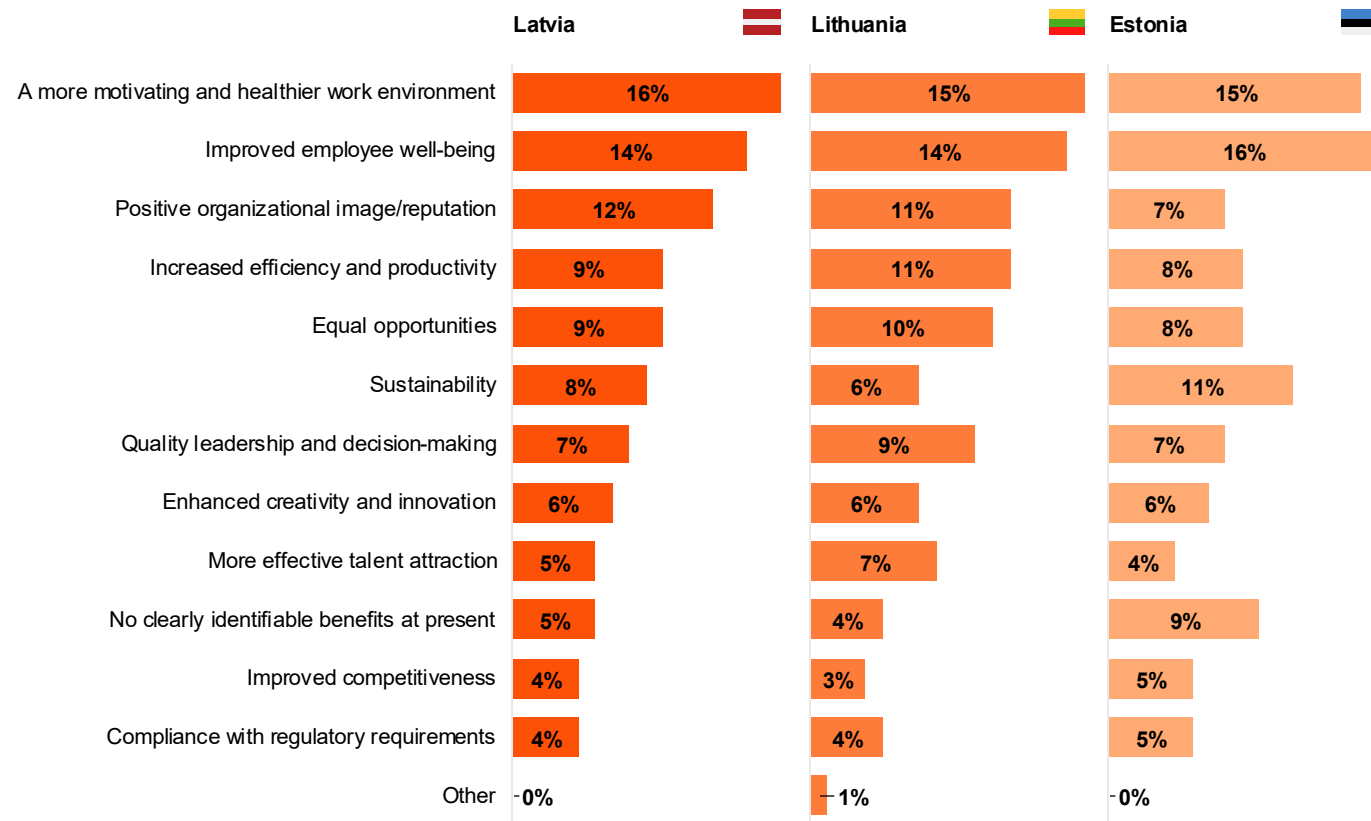
*This question was only asked to respondents who selected “This area is not on the radar for our organisation” in the question “How would you describe your organization’s approach to diversity management and creating an inclusive work environment?”.



Respondents who admitted that D&I is “**not on the radar**” most often cited the belief that **D&I is simply not an important issue in their context and therefore does not require investment** (Latvia 47%, Lithuania 44%, and Estonia 33%). Others pointed to limited internal resources or capacity to address the topic, as well as the absence of a clear business rationale to prioritise such initiatives. In Estonia, a notable share of respondents (18%) also mentioned **lack of leadership support** as a barrier – an issue that appears significantly less relevant in Latvia and Lithuania. Only a small proportion of employers across the three countries (Latvia 0%, Lithuania 6% and Estonia 10%) **reported plans to prioritise D&I in the next five years** or expressed an interest in gaining more clarity on the topic before making it a focus. Comments from respondents suggest that other pressing concerns – such as salary levels or labour shortages – are often seen as more urgent.

Inclusion is primarily valued for its impact on people

Q. What do you consider to be the most tangible benefits your organization gain from fostering an inclusive work environment?



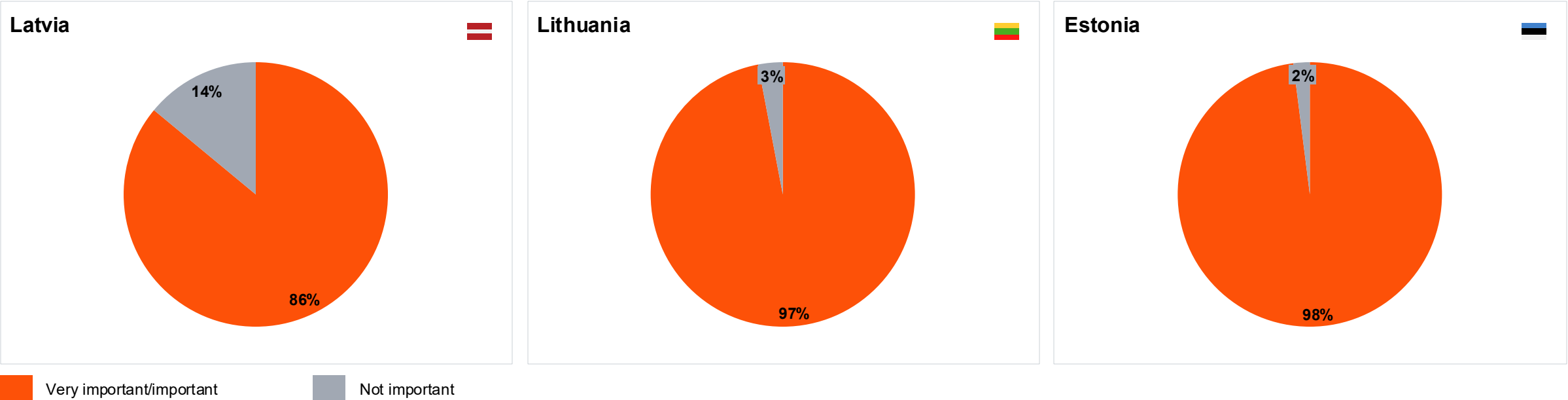
Across the Baltics, inclusion is primarily valued for its impact on people, while reputational and broader business benefits are still secondary considerations. The most frequently mentioned advantages include **a more motivating and healthier work environment** (16% in Latvia, 15% in both Lithuania and Estonia) and **improved employee well-being** (14% in Latvia and Lithuania, 16% in Estonia). This focus on employee-centric benefits suggests a shared understanding that a happy, healthy and motivated workforce is essential for long-term organisational performance. A positive organisational image or reputation ranks third among respondents in Latvia (12%) and Lithuania (11%), while receiving less emphasis in Estonia (7%).



Employee's perspective

Employees value inclusive work environments

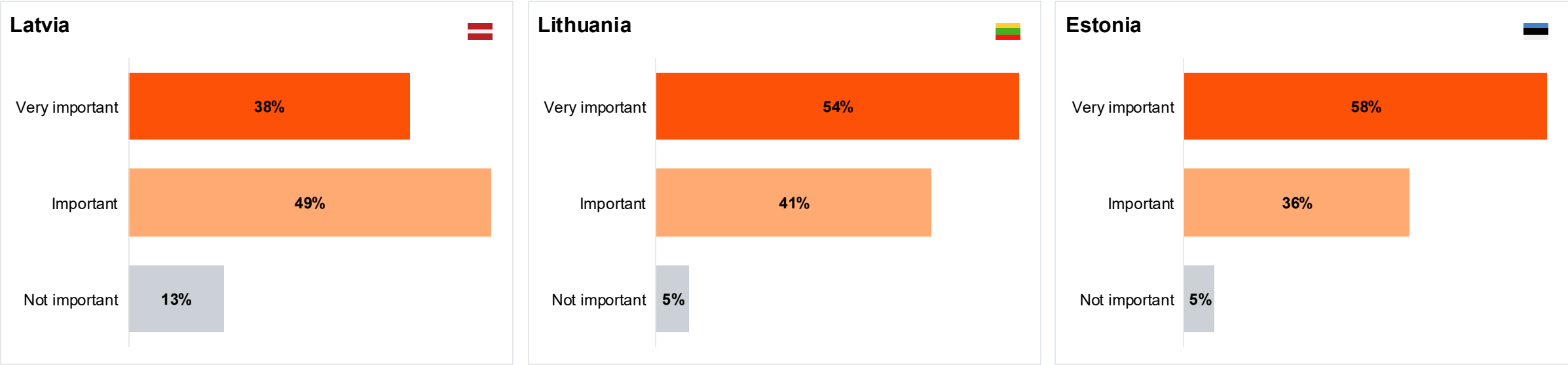
Q. When choosing an employer, how important is an inclusive work environment in the specific organisation?



Across the three Baltic countries, employees consistently regard an inclusive work environment as either “Very Important” or “Important”. In Estonia, 98% of respondents emphasise inclusivity the most, with 78% considering it “Very Important” and 20% deeming it “Important”. Lithuania follows closely with 97% (52% “Very Important” + 45% “Important”), while Latvia shows the lowest emphasis, albeit still a majority, at 86% (40% “Very Important” + 46% “Important”). The survey results clearly indicate that an overwhelming majority of employees across the Baltic countries place significant importance on an inclusive work environment.

Strong preference for diversity at workplace

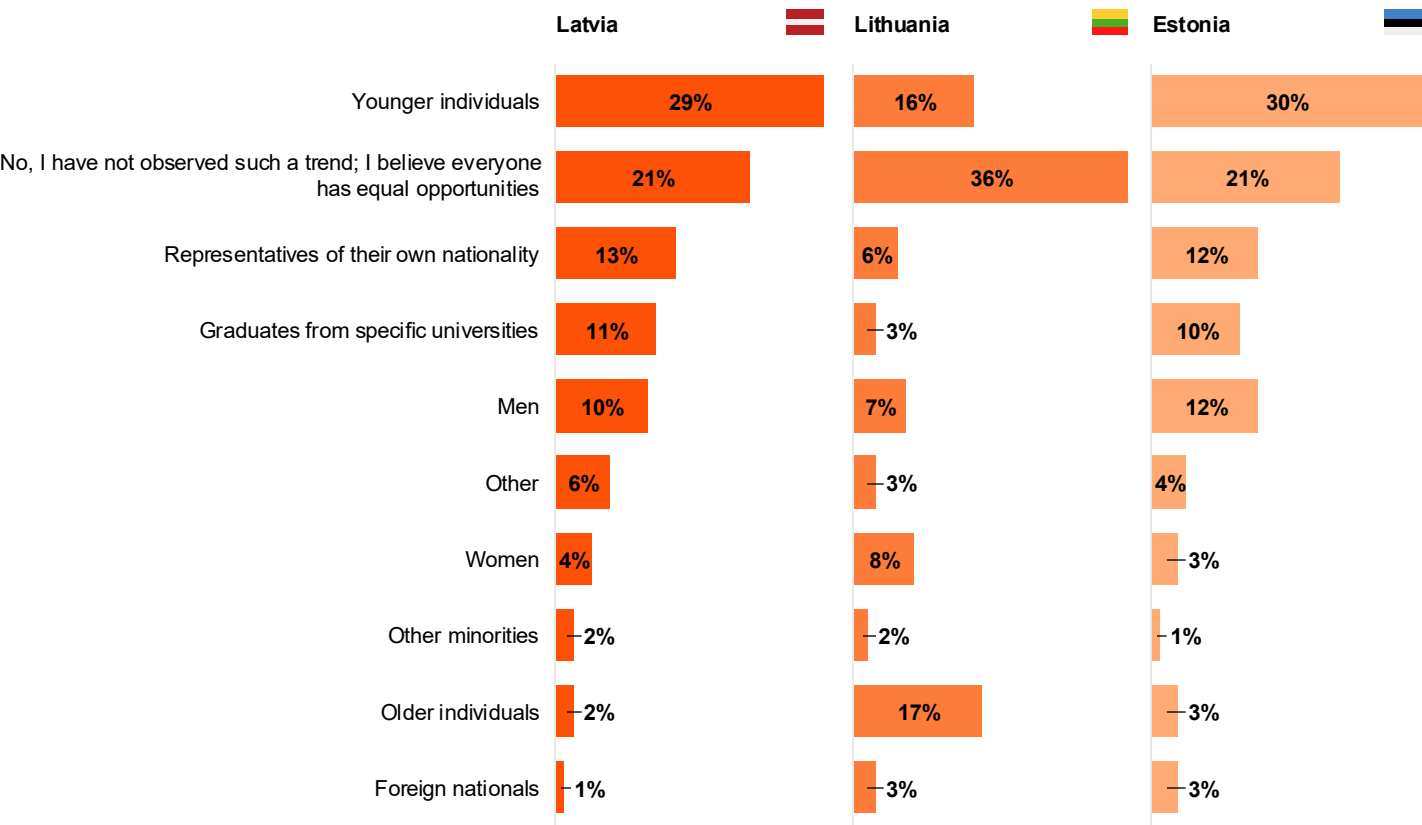
Q. When choosing an employer, how significant is the employer's interest and ability to attract employees with diverse skills and experiences to you?



The survey reveals that in the Baltic states, a substantial majority of respondents consider an employer’s interest and ability to attract employees with diverse skills and experience to be very important to them. In Estonia, this sentiment is particularly pronounced, with **94% of participants valuing inclusivity**, as 58% consider it “Very Important” and 36% deem it “Important”. In Lithuania, **95% of respondents share this view**, with 54% rating it as “Very Important” and 41% as “Important”. Meanwhile, Latvia, although showing the lowest emphasis compared to its neighbours, still records a predominant majority of **87% who find it important**, with 38% saying it is “Very Important” and 49% “Important.” **Only a small fraction of employees across the Baltic states do not regard their employer’s commitment to attracting a diverse workforce as important.** This sentiment is most prevalent in Latvia, where 13% of respondents share this view, while it is notably less common in Lithuania and Estonia, with each at 5%.

Observed employers' preferences in hiring – younger individuals, representatives of their own nationalities and men

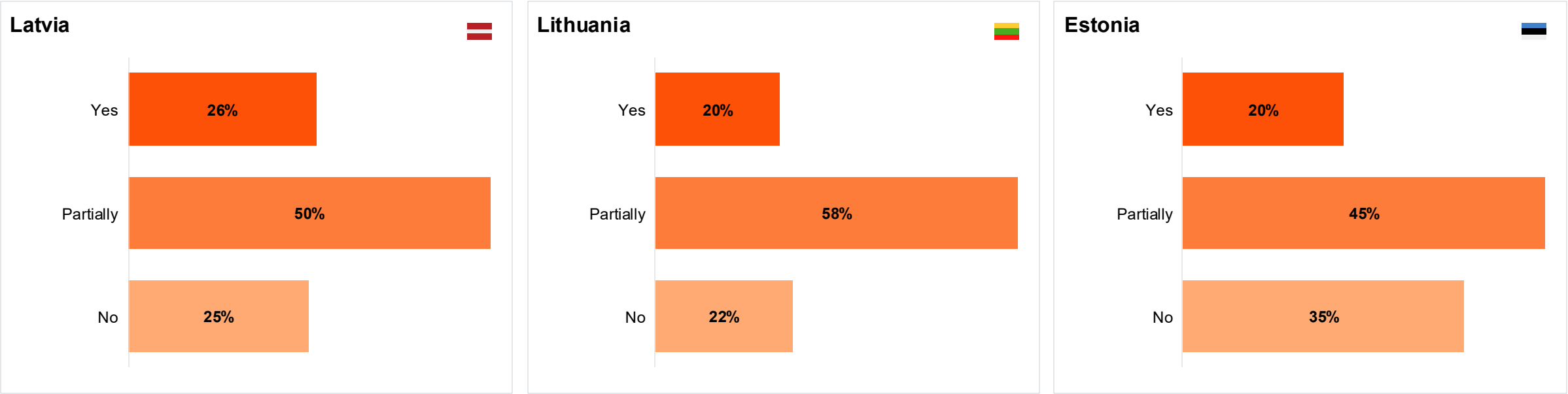
Q. Have you observed that employers tend to prefer certain types of candidates?



The survey indicates that a significant portion of respondents across the Baltic states have not noticed a tendency for employers to prefer certain types of candidates, believing instead in **equal opportunities for everyone**. Lithuania stands out with the highest percentage of respondents holding this view at 36%, compared to Latvia and Estonia, both at 21%. The most frequently observed trend across all three countries is a preference for **younger individuals**, notably in Latvia at 29%, and Estonia at 30%, although in Lithuania, this preference is less common at 16%. Preferences based on factors such as **nationality, being a foreign national or belonging to other minorities** are observed less frequently when compared to age. Latvia registers a notable observation for preference towards their own nationality at 13%, higher than Lithuania at 6%, and almost equal to Estonia at 12%.

The state of remuneration in the Baltic states raises questions about fairness

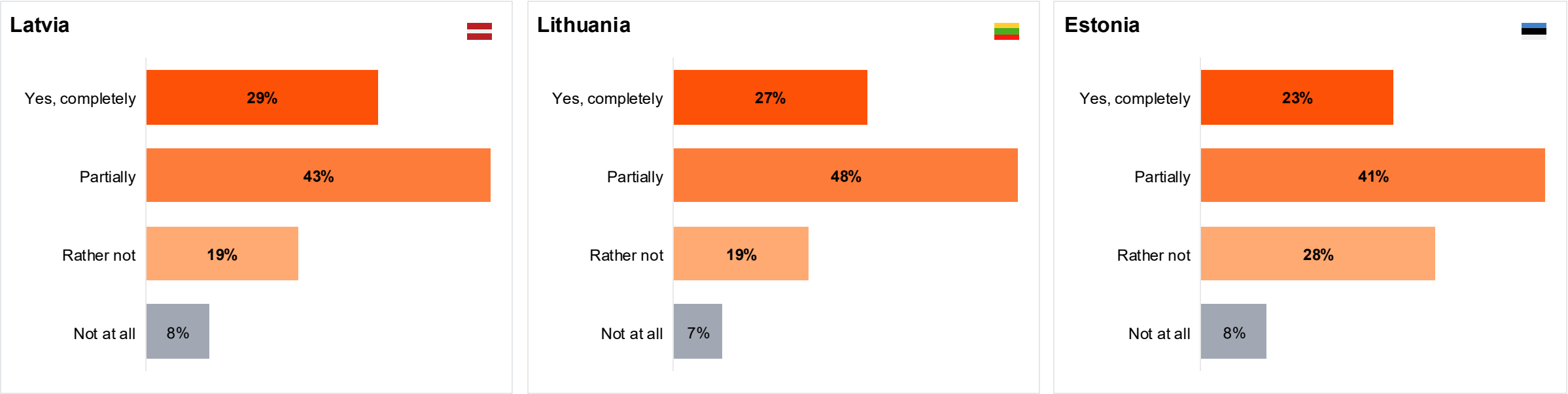
Q. Do you believe that the remuneration in your company is fair and based on skills and experience?



Approximately half of the respondents in all three Baltic countries believe that remuneration in their company is **partially fair** and based on skills and experience (Latvia 50%, Lithuania 58%, Estonia 45%). A notable percentage believe that remuneration is *not* fair (ranging from 22% to 35%), similar to the percentage of respondents who strongly agree that remuneration is fair (Latvia 25%, Lithuania 22%, Estonia 35%).

There is a potential for greater inclusivity and appreciation

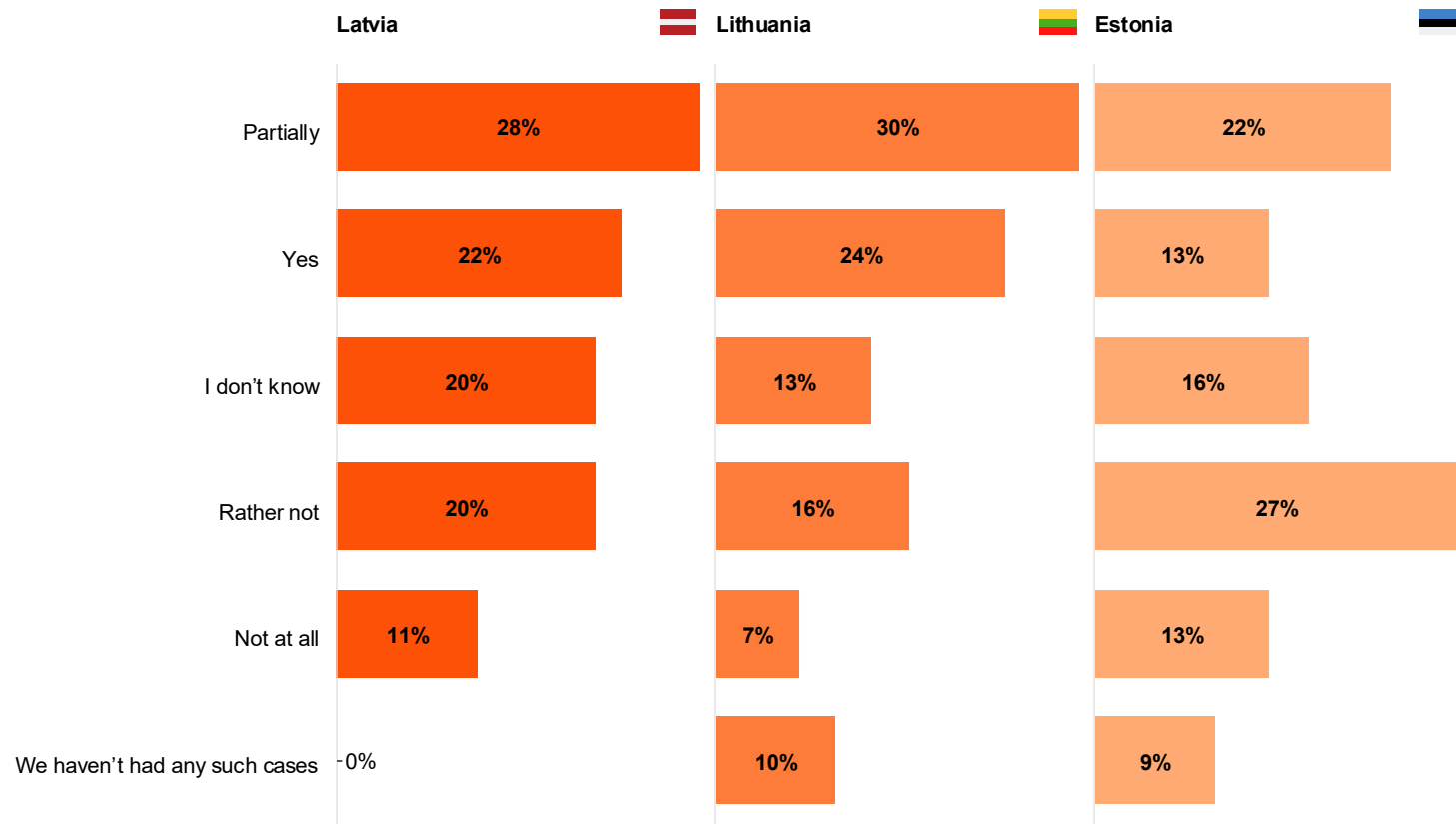
Q. Do you feel included and valued at your workplace?



43% of surveyed employees in Latvia, 48% in Lithuania and 41% in Estonia **feel partially included and valued in their current workplaces**. A quarter of the respondents (29% in Latvia, 27% in Lithuania and 23% in Estonia) indicate that they **feel fully included and valued**. Conversely, about one-fifth of respondents in Latvia (19%) and Lithuania (19%) feel rather not included and valued in their current workplaces, while in Estonia, nearly a third of the respondents (28%) feel this way. These results highlight an opportunity for organisations in the region to focus on enhancing workplace inclusivity and appreciation to better engage and support their workforce.

Employees’ perceptions of conflict and discrimination management in the Baltics

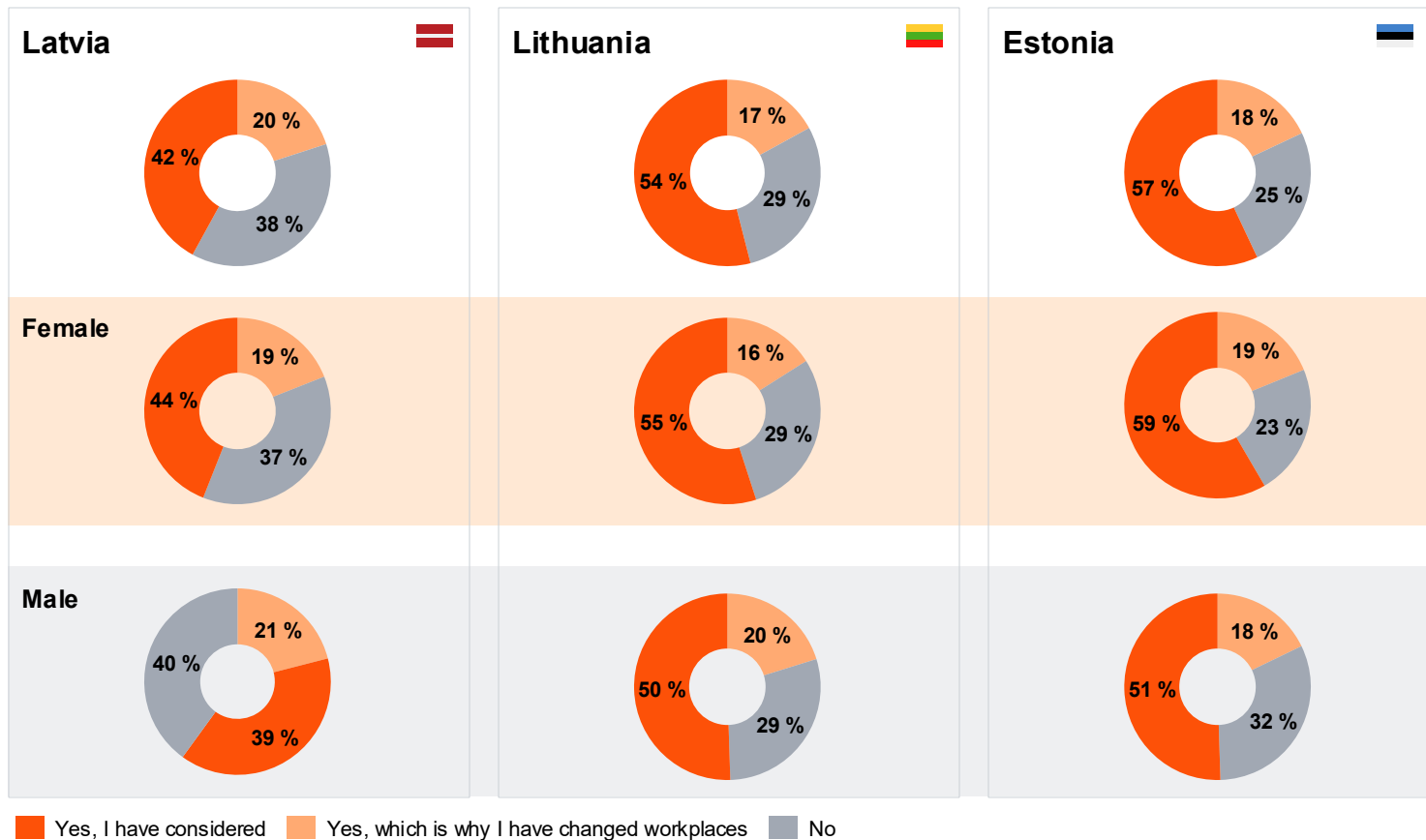
Q. In your opinion, are conflict situations and cases of discrimination effectively managed at your workplace?



In the Baltics, perceptions about the **management of conflict and discrimination** vary across the countries. In Latvia, 28% of respondents feel that these issues are only “partially” effectively managed, while 20% feel the management is “rather not” effective and 11% believe it is “not at all” effective. Lithuania has slightly higher dissatisfaction, with 30% perceiving partial effectiveness, 16% “rather not” satisfied, and 7% “not at all” satisfied. Estonia presents the most critical view, with 22% seeing only partial effectiveness, 27% indicating “rather not” satisfied, and 13% “not at all” satisfied, making it the country with the highest critical perspective at 40%. The data highlights the need for organisations to focus on improving strategies to effectively manage conflict and discrimination in Baltic workplaces.

Employees value inclusive work environments when choosing an employer, females are more sensitive to unfair conditions

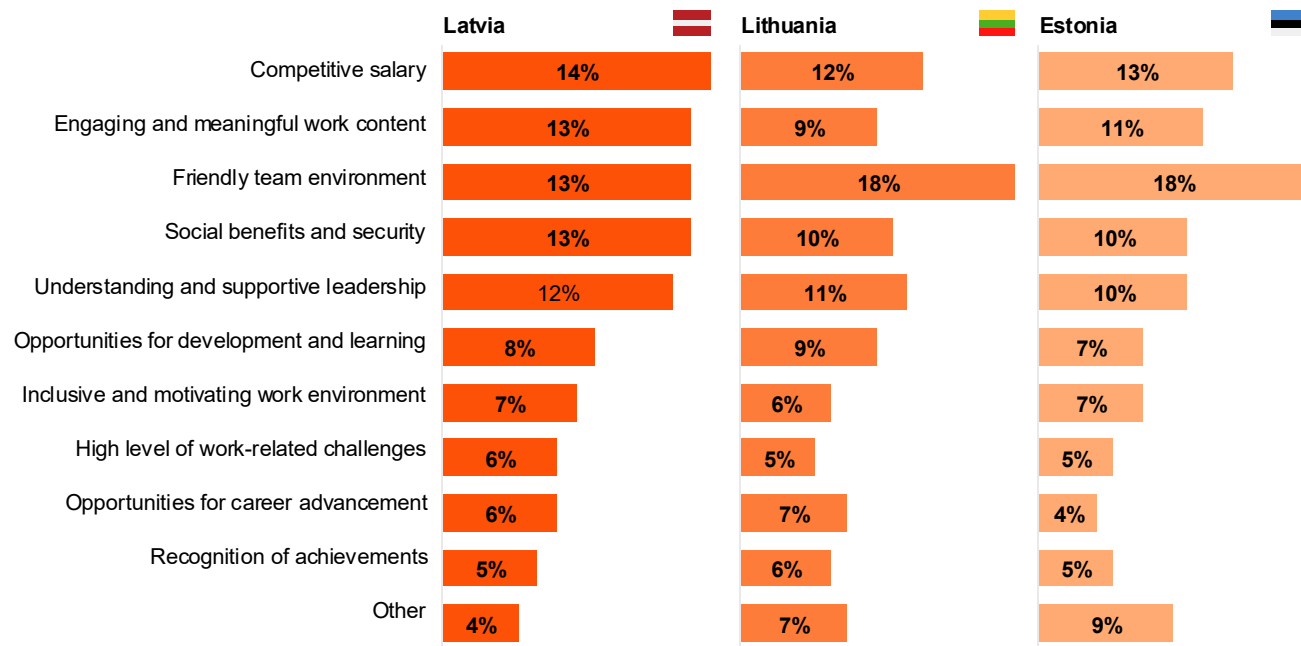
Q. Have you considered changing your workplace due to a lack of fair growth opportunities and an insufficiently inclusive work environment?



A substantial proportion of respondents in all three countries **have considered changing workplaces due** to a lack of fair growth opportunities and an insufficiently inclusive work environment. Respondents in Lithuania (54%) and Estonia (57%) report higher rates of having considered a change compared to Latvia (42%). Across the Baltic region, nearly **1 in 6 employees have left their job due** to an insufficiently inclusive work environment or a lack of equitable career growth opportunities (20% Latvia, 18% Estonia, 17% Lithuania). Nearly 30% of employees in the Baltics have not considered changing the workplace due to a lack of fair growth opportunities and an insufficiently inclusive work environment (38% employees in Latvia, 29% in Lithuania and 25% in Estonia). **Females are more likely to consider a change** across all countries, reflecting potentially greater sensitivity to D&I concerns (overall female – Latvia 44%, Lithuania 55%, Estonia 59%, and overall male – Latvia 39%, Lithuania 50%, Estonia 51%). **In Latvia, male** respondents between 18 and 29 years old showed the highest likelihood of considering a job change (67%) when assessing issues such as inclusion, access and growth opportunity, but this likelihood is not so high among the males who are aged 50–59 (25%). In Lithuania and Estonia, respondents show less age-related differences in this regard.

Employees prioritise a friendly team environment above other workplace values

Q. What motivates you to stay at your current workplace?



Top 3 factors for female:

17% 12% 11%

friendly team environment

competitive salary

social benefits and security, as well as understanding and supportive leadership

Top 3 factors for male:

16% 15% 12%

friendly team environment

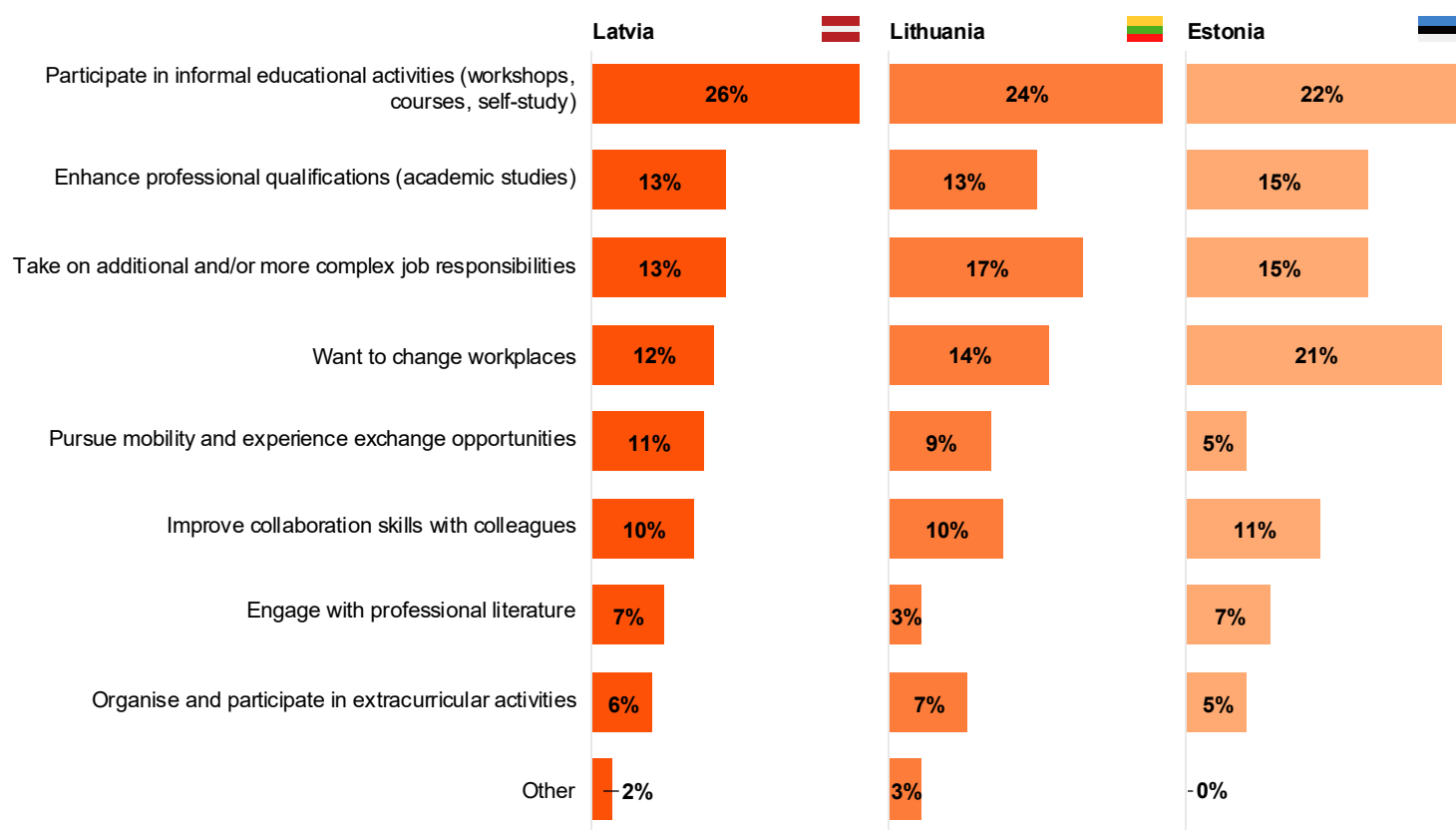
competitive salary

engaging and meaningful work content

Friendly team environment (Latvia: 13%, Lithuania: 18%, Estonia: 18%) and **competitive salary** (Latvia: 14%, Lithuania: 12%, Estonia: 13%) are identified by survey respondents as the primary motivators for employee retention across the Baltic region. While Engaging and Meaningful Work (Latvia: 13%, Lithuania: 9%, Estonia: 11%) ranks as the third most influential factor, Lithuanian respondents placed comparatively less emphasis on this aspect. In contrast, **opportunities for career advancement** (Latvia 6%, Lithuania 7%, Estonia 4%) and **Recognition of achievements** (Latvia 5%, Lithuania 6%, Estonia 5%) were rated by respondents as **less significant** motivators for employees to remain in their current positions.

Employees are actively seeking opportunities for career advancement and skill development

Q. What skills and knowledge do you wish to acquire or develop over the next five years to enhance your job performance and career growth?

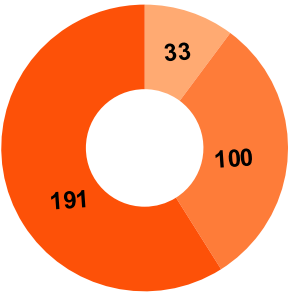


Employees across all three Baltic countries show a strong desire to engage in **informal educational activities** such as workshops, courses and self-study. This trend is most pronounced in Latvia (26%), followed by Lithuania (24%) and Estonia (22%), indicating a keen interest in learning and skill development. In both Lithuania (17%) and Estonia (15%), **employees express an intention to take on additional or more complex job responsibilities**, reflecting ambitions and a desire for professional growth in their careers. In Estonia, 21% of employees have expressed a **desire to change workplaces over the next five years**, which is significantly higher compared to Latvia (12%) and Lithuania (14%). This could suggest lower satisfaction with the current work environment in Estonia or greater job mobility compared to other Baltic countries.

About the survey

The Baltic Human Capital and Work Environment Survey was conducted online from 4 to 24 April 2025. A total of 324 employers and 2620 employees from Latvia, Lithuania and Estonia participated in the survey. The survey aims to understand and compare how employers and employees value the significance of the work environment, identify which priorities are emphasised and why, and determine the directions in which employers plan to work towards ensuring a sustainable human resources strategy. The percentage differences reflected in this report are derived using rounded percentage values.

Employers



Employers, n=324

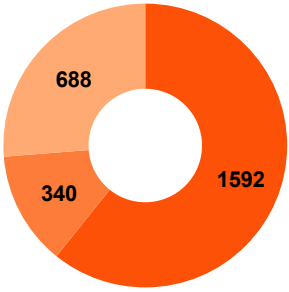
Represented industries:

Production and manufacturing, IT, Construction, Hospitality, Healthcare, Finance, Agriculture, Education, Engineering and Technology, Entertainment, and others.

Company size (by number of employees):

42 organisations: 1 to 10 employees
86 organisations: 11 to 49 employees
100 organisations: 50 to 149 employees
35 organisations: 150 to 249 employees
61 organisations: 250 or more employees

Employees



Employees, n=2620

Age of respondents:

13% – 18 – 29 age group
22% – 30-39 age group
30% – 40-49 age group
25% – 50-59 age group
10% – 60+ age group

Gender:

72% female
28% male

Current employment status:

80% (2102 employees) employed
20% (518 employees) unemployed

Baltic Human Capital and Work Environment Survey 2025