



Top GBS Employers™ in India, the Philippines, and Poland – 2024

July 2024

Market Report
Talent Excellence GBS



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- ▶ Locations Insider™
- ▶ Marketing Services
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- ▶ Microsoft Business Application Services
- ▶ Modern Application Development (MAD)
- ▶ Mortgage Operations
- ▶ Multi-country Payroll
- ▶ Network Services and 5G
- ▶ Oracle Services
- ▶ Outsourcing Excellence
- ▶ Payer and Provider Business Process
- ▶ Payer and Provider Information Technology
- ▶ Price Genius – AMS Solution and Pricing Tool
- ▶ Pricing Analytics as a Service
- ▶ Process Intelligence
- ▶ Process Orchestration
- ▶ Procurement and Supply Chain
- ▶ Recruitment
- ▶ Retail and CPG IT Services
- ▶ Retirement Technologies
- ▶ Revenue Cycle Management
- ▶ Rewards and Recognition
- ▶ SAP Services
- ▶ Service Optimization Technologies
- ▶ Software Product Engineering Services
- ▶ Supply Chain Management (SCM) Services
- ▶ Sustainability Technology and Services
- ▶ Talent Genius™
- ▶ Technology Skills and Talent
- ▶ Trust and Safety
- ▶ Value and Quality Assurance (VQA)

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Contents

04	Introduction and overview	45	Insights on perceived strengths of different EVP levers
05	Research methodology	49	Assessment of the top GBS employers over time
06	Background and context	50	Comparative assessment across industries
07	Importance of an outside-in perspective and key data sources	53	Industry-specific insights
08	Understanding the purpose and utilization of this analysis	61	List of GBS employers analyzed
09	Key drivers of employer brand perception in 2024		
10	Approach to determine overall positioning of each GBS employer	63	Top GBS Employers™ in key talent markets – Poland
11	Summary of key takeaways	64	Everest Group Top GBS Employers™ 2024
		65	Scorecards of top GBS employers
16	Top GBS Employers™ in key talent markets – India	67	Insights on perceived strengths of different EVP levers
17	Everest Group Top GBS Employers™ 2024	71	Assessment of the top GBS employers over time
18	Scorecards of top GBS employers	72	Comparative assessment across industries
22	Insights on perceived strengths of different EVP levers	75	Industry-specific insights
26	Assessment of the top GBS employers over time	83	List of GBS employers analyzed
27	Comparative assessment across industries		
30	Industry-specific insights	84	What works or needs attention in different geographies
38	List of GBS employers analyzed	85	Geographical comparison of employer brand perception over time
		86	How EVP levers compare across India, the Philippines, and Poland
41	Top GBS Employers™ in key talent markets – the Philippines	87	How age, size, and HQ of parent company affect GBS employer attractiveness
42	Everest Group Top GBS Employers™ 2024		
43	Scorecards of top GBS employers	90	Appendix

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Introduction and overview

Research methodology

Background and context

Importance of an outside-in perspective and key data sources

Understanding the purpose and utilization of this analysis

Key drivers of employer brand perception in 2024

Approach to determine the overall positioning of each GBS employer

Summary of key takeaways

Our research methodology is based on four pillars of strength to produce actionable and insightful research for the industry

01 Robust definitions and frameworks

Function-specific pyramid, Total Value Equation (TVE), PEAK Matrix®, and market maturity

02 Primary sources of information

Annual contractual and operational RFIs, provider briefings and buyer interviews, web-based surveys

03 Diverse set of market touchpoints

Ongoing interactions across key stakeholders, input from a mix of perspectives and interests

04 Fact-based research

Data-driven analysis with expert perspectives, trend-analysis across market adoption, contracting, and providers

Proprietary database of 9000+ GBS centers globally (updated annually)

Year-round tracking of 300+ locations around the world

Large repository of existing research in on offshore, nearshore, and onshore locations across (APAC, Europe, North America, LATAM, and Africa)

Over 30 years of experience advising clients on strategic IT, business services, engineering services, and sourcing

Executive-level relationships with buyers, providers, technology providers, and industry associations

Background and context

Amid the transition from the economic challenges of slowdown and layoffs to a revitalized landscape marked by fierce competition for top talent, the significance of maintaining a positive brand image remains critical for attracting and retaining high-quality talent. In this era, where specialized functional and behavioral skills are becoming ever more critical, the quest to attract and retain exceptional talent has become paramount for organizations. Talent is undoubtedly the key differentiating factor, and GBS employers need a multi-pronged approach to build, maintain, and strengthen their employer brand perception in local markets.

In its latest iteration, Top GBS Employers™ research analyzes the employer brand perception of 380+ leading GBS employers across India, the Philippines, and Poland across multiple dimensions – compensation and benefits, work environment, office ecosystem, work-life balance, hybrid work policies, culture and values, leadership, career development, and diversity and inclusion.

This study also analyzes the perceived performance of each of these GBS employers in the local talent markets based on prevailing attrition rates, growth, and employee satisfaction ratings. We also assess the initiatives best-in-class GBS employers undertake to differentiate themselves in talent markets.

Leading global GBS employers can leverage these insights in addition to Everest Group's talent performance framework to optimize their talent management strategies and build future-proof talent models. By design, this analysis is based on publicly available information only with an intent to capture prospective employees' perceptions about top GBS employers. This assessment is reflective of market trends as of H1 2024. We will continue to track this market and refresh this assessment annually.

Scope of coverage

Benchmarking top GBS employers on their employer brand perception, location- and industry-specific variations, and key implications for GBS employers

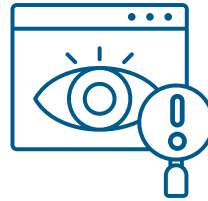
What will you learn?

The impact of various factors (compensation and benefits, work environment, office ecosystem, work-life balance, hybrid work policies, culture and values, leadership, career development, diversity, and inclusion) on overall employer brand perception and subsequent perceived success in the local talent markets

Understanding the importance of an outside-in perspective on employer brand perception and key data sources used for the analysis



GBS employer leaders lack an outside-in perspective on employer brand perception



There is a lack of employer brand perception studies focused specifically on how GBS employers are perceived



GBS employers are unaware of the evolving employee needs, and ever-changing competitive landscape

Everest Group Top GBS Employers™ fulfills this need and provides an **outside-in proxy** along with data-backed perspectives on the top employers' brand perceptions in key markets, market trends on key Employee Value Proposition (EVP) levers, variations across geographies and industries, and learnings from top employers

Data sources used for the analysis

[NOT EXHAUSTIVE]



Understanding the purpose and utilization of this analysis

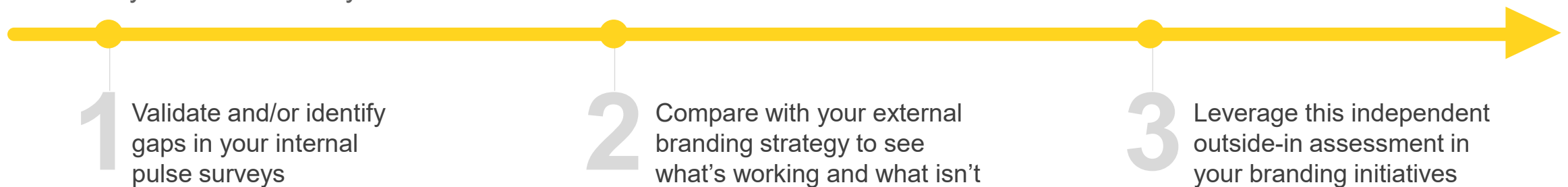
Understanding what this analysis is (by design)...

- ...a reflection of employee/candidate sentiment
- ...unbiased, non-manipulated data
- ...reporting from your employee/candidate perspective
- ...comparison of your GBS brand perception with peers in the local market
- ...targeted assessment for GBS branding, excluding general brand perception of the parent company

This analysis is **NOT**...

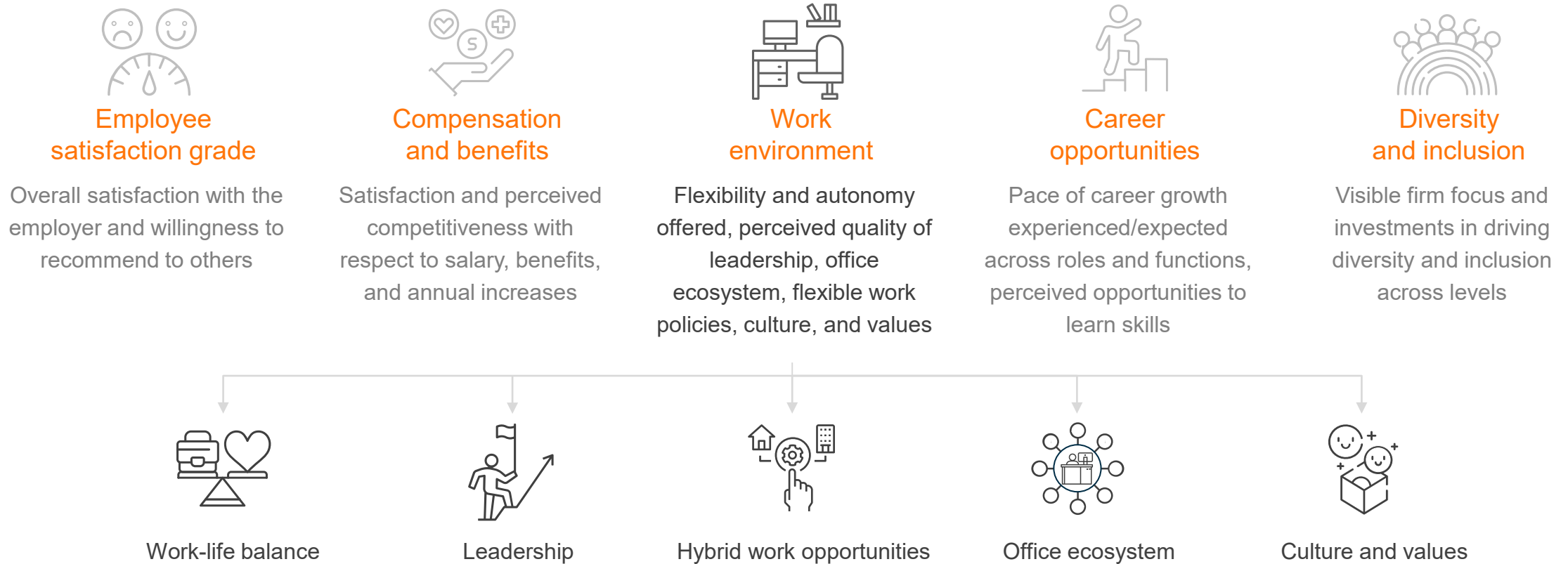
- ...a survey- or interview-based research of your employees / target candidates
- ...contextualized to your inputs – all privileged information with Everest Group is confidential and not used in this analysis
- ...guaranteed reflection of reality – this study analyzes and reports perception
- ...a prescription – this study highlights areas that demand investigation by correlating with other data sources to improve/sustain GBS brand position

How can you use this analysis?



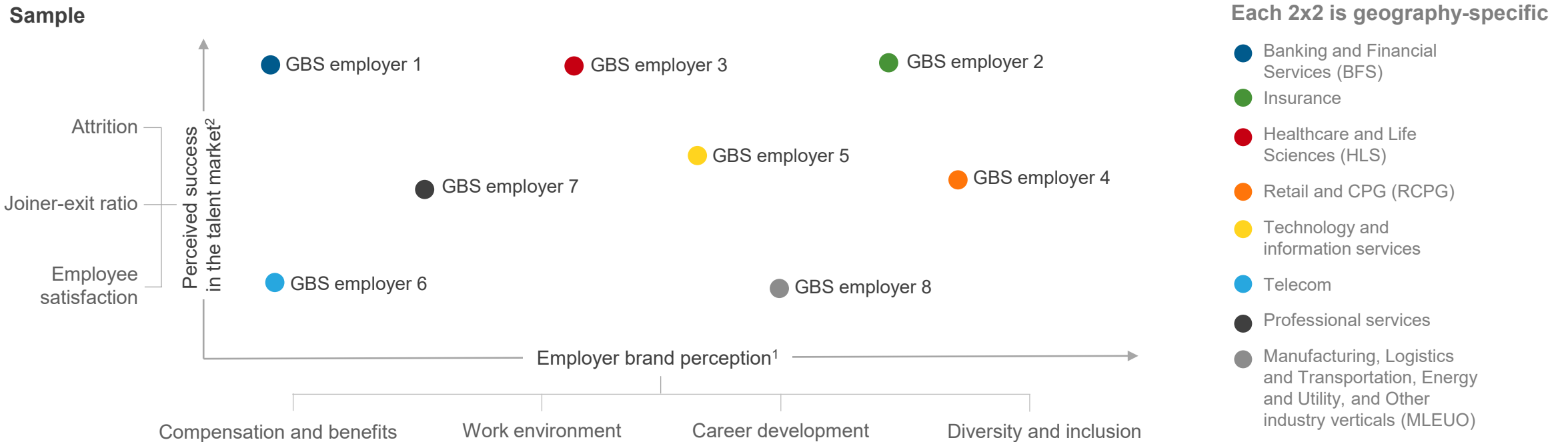
Key drivers of employer brand perception in 2024

This analysis provides a comparative snapshot of leading firms' market perceptions from third-party sources

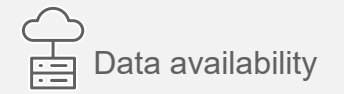
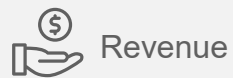


Everest Group Top GBS Employers™ 2024

Approach to determine the overall positioning of each GBS employer



Criteria for selection of companies in each industry



¹ Employer brand perception incorporates the weighted score for employee sentiments across factors such as compensation and benefits, work environment (office ecosystem, work-life balance, hybrid work policies, culture and values, leadership, etc.), career development, and diversity and inclusion

² Perceived success in the talent market incorporates the weighted score for outcomes such as employee attrition, net gain-loss of talent, and employee satisfaction scores

Summary of key takeaways

Shift from an employee's market to being an employer's market has increased general employee dissatisfaction, reflected in brand perception and sentiment analysis

Employer brand perception for GBS has continued to deteriorate since 2022, with average GBS brand perception declining by 3% in India and the Philippines, though Poland bucked the trend, with a YoY 7% jump



Brand perception is volatile; 40% of last year's top GBS employers have fallen out of the top quadrant



Perception of work environment and compensation and benefits are crucial for GBS employers; 50% of GBS employers with high ratings in these parameters outperform peers



Perceived lack of investment in career development and upskilling remains a major concern for employees. GBS ratings on this parameter have dropped 7% YoY in India and the Philippines for GBS employers



Employer brand perception for the Philippines tends to be better than for India and Poland. Average scores in the Philippines over the last three years were 7-12% higher than average scores in India and Poland over the same period. Cultural differences play a key role in how much consideration employees exhibit for their employers.



Summary of key takeaways | by GBS center location



What is common for GBS employers across geographies?

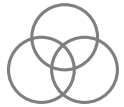
- Performance on all EVP parameters remains below the pre-2022 levels, signaling a need for sustained improvements and investments
- Previous strong performances, foundations, and similar talent strategies do not necessarily guarantee retention in the top quadrant
- Perceived focus on career development and work environment ratings are declining due to perceived slow growth, rapid technological changes, and growing skills gap
- MLEUO and professional services are among the underperforming verticals across India, the Philippines, and Poland



What varies for GBS employers across geographies

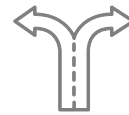
- While EVP in India and the Philippines continues to decline, GBS employers in Poland have made progress to enhance their employee value proposition
- India boasts a notable increase in retention among top employers with 75% retaining position in the top quadrant, while the Philippines and Poland show lower retention rates of 60% and 40% respectively
- India and the Philippines GBS employers continue to experience concerning sentiment on career development and work environment, experiencing declines of 2-8%; however, Poland has recorded marked improvements on these dimensions of 2-4%
- Verticals (except for MLEUO and professional services) do not impact the perception across geographies as much as the individual GBS employers' performance

Summary of key takeaways | by industry vertical



What is common for GBS employers across verticals?




- Companies across all verticals have observed a noticeable decline in their employer brand perception across all geographies
- Most verticals have maintained more than 50% retention rates in the top quadrant as top GBS employers across geographies
- There is a general trend of negative or declining performance on the career development parameter across most verticals and geographies
- In 2024, most verticals have an equal share of 6-14% in the top GBS employers' quadrant



What varies for GBS employers across verticals

- The extent of decline in employer brand perception varies for verticals such as insurance and technology and information services, where India and the Philippines show a 1-5% decline while Poland shows an improvement of 20-34%
- Verticals such as technology and information services have a significantly lower retention rate – less than 30%; moreover, no employer from the professional services vertical was able to retain position in the top quadrant, similar to the previous year trend
- Significant variations are observed for career development in the technology and information services (improvement by 50% in Poland) and HLS (improvement by 10% in the Philippines) verticals, where different geographies show contrasting trends
- BFS, RCPG, and MLEUO verticals holds an individual share of 16-21% in the top quadrant, while professional services industry holds the smallest share of 3%

Testing some popular beliefs on GBS brand perception

 Popular belief	 What the data shows	 Verdict
Large GBS organizations typically enjoy a more favorable brand perception	Size does not guarantee positive brand perception; data for ~800 companies assessed shows limited relationship	False
Long-established GBS entities have a solid foundation for cultivating stronger brand perception over time	Data shows only a weak correlation between GBS age and brand perception	False
A company's headquarters location can impact the brand perception of its GBS division	North American-headquartered companies' GBS tend to do better in India and the Philippines whereas European-headquartered companies' GBS do better in Poland	True
Employee preferences may vary across industry verticals, impacting their perception of GBS entities within those sectors	GBS entities from specific industries, such as BFS, and retail, and CPG, consistently perform better than peers, indicating employee preference or bias	True
GBS organizations co-located in markets with substantial business presence may face challenges in brand perception	The parent company's local brand perception has direct impact on GBS brand perception, both positively and negatively	False

Top GBS Employers™ in key talent markets

India

The Philippines

Poland

Top GBS Employers™ in in key talent markets

India

Everest Group Top GBS Employers™ 2024

Scorecards of top GBS employers

Insights on perceived strengths of different EVP levers

- Compensation and benefits
- Work environment
- Career development
- Diversity and inclusion

Assessment of the top GBS employers over time

Comparative assessment across industries

Industry-specific insights

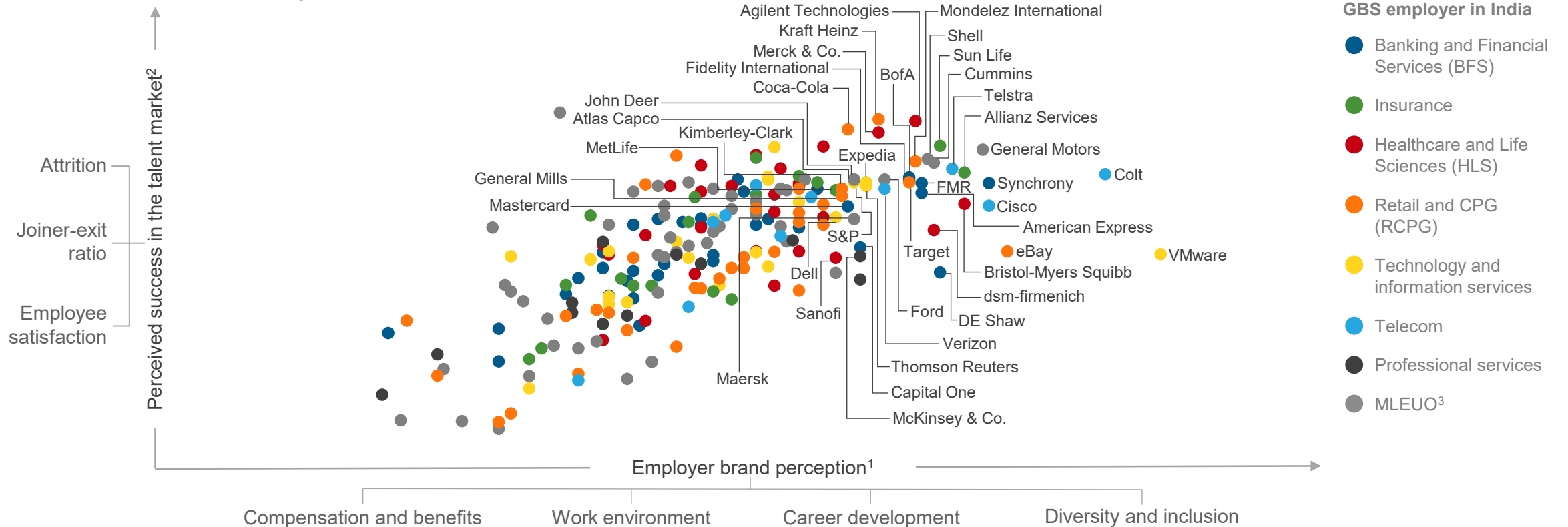
List of GBS employers analyzed

The Philippines

The Poland

Everest Group Top GBS Employers™ 2024 – India

Everest Group Top GBS Employers™ 2024 – India, N⁴=210



¹ Employer brand perception incorporates the weighted score for employee sentiments across factors such as compensation and benefits, work environment (office ecosystem, work-life balance, hybrid work policies, culture and values, leadership, etc.), career development, and diversity and inclusion

² Perceived success in the talent market incorporates the weighted score for outcomes such as employee attrition, net gain-loss of talent, and employee satisfaction scores

³ MLEUO includes Manufacturing, Logistics and Transportation, Energy and Utility, and Other industry verticals

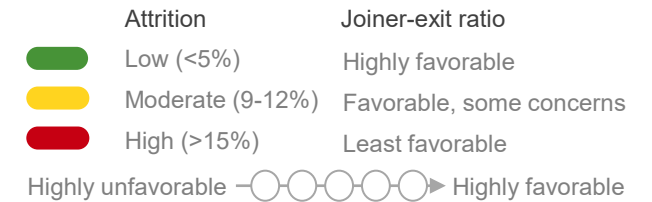
⁴ N = number of companies in the analysis

Note: GBS employers in India of the mentioned companies have been identified as the top GBS employers in 2024

Source: This analysis is based on various publicly available data sources such as global, regional, and local employee forums, job posting websites, social media, professional media, and Everest Group (2024) analysis

Everest Group Top GBS Employers™ 2024 – India (page 1 of 4)

Top 40 GBS employers



Company ³	EMPLOYER BRAND PERCEPTION ¹				PERCEIVED SUCCESS IN THE TALENT MARKET ²		
	Compensation and benefits	Work environment	Career development	Diversity and inclusion	Attrition	Joiner-exit ratio	Employee satisfaction grade
Agilent Technologies	\$\$\$ \$ \$		★★★★★		Low (<5%)	Moderate (9-12%)	A+
Allianz Services	\$\$\$ \$ \$		★★★★★		Moderate (9-12%)	Low (<5%)	A
American Express	\$\$\$ \$ \$		★★★★★		Moderate (9-12%)	Moderate (9-12%)	A
Atlas Copco Group	\$\$\$ \$ \$		★★★★★		Moderate (9-12%)	Low (<5%)	A
Bank of America	\$\$\$ \$ \$		★★★★★		Low (<5%)	Low (<5%)	A
Bristol-Myers Squibb	\$\$\$ \$ \$		★★★★★		Low (<5%)	Low (<5%)	B
Capital One	\$\$\$ \$ \$		★★★★★		Moderate (9-12%)	Low (<5%)	B
Cisco Systems	\$\$\$ \$ \$		★★★★★		Moderate (9-12%)	Moderate (9-12%)	A
Coca-Cola	\$\$\$ \$ \$		★★★★★		Low (<5%)	Low (<5%)	A+
Colt Group	\$\$\$ \$ \$		★★★★★		Moderate (9-12%)	High (>15%)	A+

¹ Represents the aggregate rating of outside-in perception across parameters such as compensation and benefits, work environment (office ecosystem, work-life balance, hybrid work policies, culture and values, leadership, etc.), career development, and diversity and inclusion

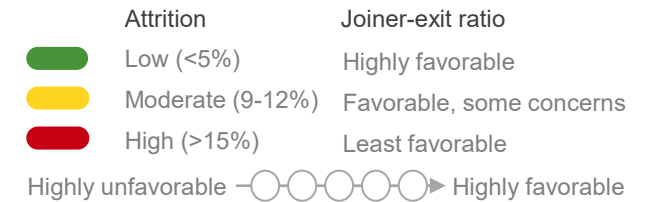
² Represents the aggregate ratings of parameters such as employee attrition, net gain-loss of talent, and employee satisfaction scores

³ GBS employer in India of the mentioned company

Source: Various publicly available data sources such as global, regional, and local employee forums, job posting websites, social media, professional media, and Everest Group (2024) analysis

Everest Group Top GBS Employers™ 2024 – India (page 2 of 4)

Top 40 GBS employers



Company ³	EMPLOYER BRAND PERCEPTION ¹				PERCEIVED SUCCESS IN THE TALENT MARKET ²		
	Compensation and benefits	Work environment	Career development	Diversity and inclusion	Attrition	Joiner-exit ratio	Employee satisfaction grade
Cummins	\$\$\$ \$ \$		★★★★★		Low (<5%)	Highly favorable	A+
DE Shaw Group	\$\$\$ \$ \$ \$		★★★★★		Moderate (9-12%)	Favorable, some concerns	B
Deere & Company	\$\$\$ \$ \$ \$		★★★★★		Low (<5%)	Highly favorable	A
Dell Technologies	\$\$\$ \$ \$ \$		★★★★★		Low (<5%)	Least favorable	A
dsm-firmenich	\$\$\$ \$ \$ \$		★★★★★		Moderate (9-12%)	Favorable, some concerns	A
eBay	\$\$\$ \$ \$ \$		★★★★★		Low (<5%)	Highly favorable	B
Expedia Group	\$\$\$ \$ \$ \$		★★★★★		Low (<5%)	Highly favorable	A
Fidelity International	\$\$\$ \$ \$ \$		★★★★★		Low (<5%)	Highly favorable	A
Fidelity Investments	\$\$\$ \$ \$ \$		★★★★★		Low (<5%)	Highly favorable	A
Ford Motor	\$\$\$ \$ \$ \$		★★★★★		Low (<5%)	Highly favorable	A

¹ Represents the aggregate rating of outside-in perception across parameters such as compensation and benefits, work environment (office ecosystem, work-life balance, hybrid work policies, culture and values, leadership, etc.), career development, and diversity and inclusion

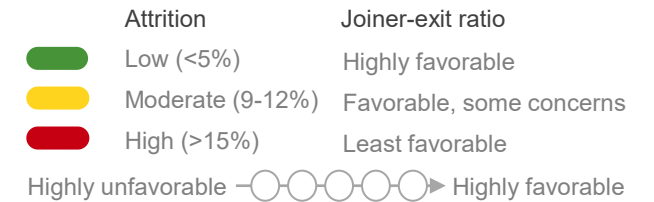
² Represents the aggregate ratings of parameters such as employee attrition, net gain-loss of talent, and employee satisfaction scores

³ GBS employer in India of the mentioned company

Source: Various publicly available data sources such as global, regional, and local employee forums, job posting websites, social media, professional media, and Everest Group (2024) analysis

Everest Group Top GBS Employers™ 2024 – India (page 3 of 4)

Top 40 GBS employers



Company ³	EMPLOYER BRAND PERCEPTION ¹				PERCEIVED SUCCESS IN THE TALENT MARKET ²		
	Compensation and benefits	Work environment	Career development	Diversity and inclusion	Attrition	Joiner-exit ratio	Employee satisfaction grade
General Mills	\$\$\$		★★★★☆		Low	Highly favorable	A
General Motors	\$\$\$		★★★★☆		Low	Highly favorable	A
Kimberly-Clark Corporation	\$\$\$		★★★★☆		Low	Highly favorable	A
Kraft Heinz	\$\$\$		★★★★☆		Low	Highly favorable	A+
Maersk	\$\$\$		★★★★☆		Low	Highly favorable	B+
MasterCard International	\$\$\$		★★★★☆		Low	Highly favorable	B+
McKinsey & Company	\$\$\$		★★★★☆		Moderate	Favorable, some concerns	B+
Merck & Co	\$\$\$		★★★★☆		Low	Highly favorable	A+
MetLife	\$\$\$		★★★★☆		Low	Highly favorable	A
Mondelez International	\$\$\$		★★★★☆		Moderate	Favorable, some concerns	A+

¹ Represents the aggregate rating of outside-in perception across parameters such as compensation and benefits, work environment (office ecosystem, work-life balance, hybrid work policies, culture and values, leadership, etc.), career development, and diversity and inclusion

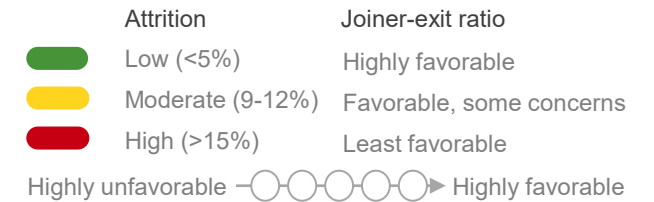
² Represents the aggregate ratings of parameters such as employee attrition, net gain-loss of talent, and employee satisfaction scores

³ GBS employer in India of the mentioned company

Source: Various publicly available data sources such as global, regional, and local employee forums, job posting websites, social media, professional media, and Everest Group (2024) analysis

Everest Group Top GBS Employers™ 2024 – India (page 4 of 4)

Top 40 GBS employers



Company ³	EMPLOYER BRAND PERCEPTION ¹				PERCEIVED SUCCESS IN THE TALENT MARKET ²		
	Compensation and benefits	Work environment	Career development	Diversity and inclusion	Attrition	Joiner-exit ratio	Employee satisfaction grade
Royal Dutch Shell	\$\$\$		★★★★☆		Low (<5%)	Highly favorable	A
S&P Global	\$\$\$\$		★★★★☆		Moderate (9-12%)	Highly favorable	A
Sanofi	\$\$\$\$		★★★★☆		Moderate (9-12%)	Highly favorable	B
Sun Life Financial	\$\$\$\$		★★★★☆		Moderate (9-12%)	Highly favorable	A+
Synchrony Financial	\$\$\$\$		★★★★☆		Moderate (9-12%)	Highly favorable	A
Target	\$\$\$\$		★★★★☆		Moderate (9-12%)	Highly favorable	A
Telstra	\$\$\$\$		★★★★☆		Moderate (9-12%)	Highly favorable	A
Thomson Reuters	\$\$\$\$		★★★★☆		Moderate (9-12%)	Highly favorable	A
Verizon Communications	\$\$\$\$		★★★★☆		Moderate (9-12%)	Highly favorable	A
VMware	\$\$\$\$		★★★★☆		High (>15%)	Least favorable	A

¹ Represents the aggregate rating of outside-in perception across parameters such as compensation and benefits, work environment (office ecosystem, work-life balance, hybrid work policies, culture and values, leadership, etc.), career development, and diversity and inclusion

² Represents the aggregate ratings of parameters such as employee attrition, net gain-loss of talent, and employee satisfaction scores

³ GBS employer in India of the mentioned company

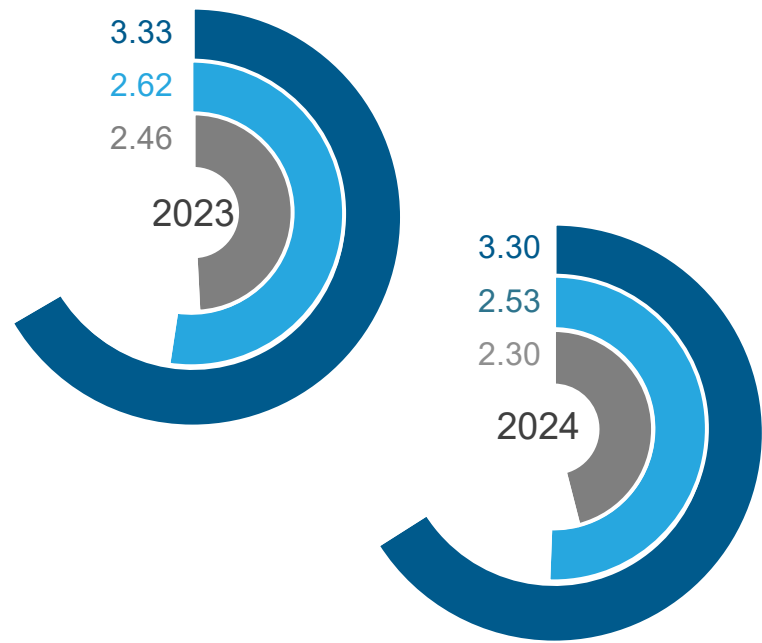
Source: Various publicly available data sources such as global, regional, and local employee forums, job posting websites, social media, professional media, and Everest Group (2024) analysis

Insights on perceived strengths of different EVP levers – India (page 1 of 4)

Compensation and benefits

Compensation and benefits

- Top GBS employers
- Overall average
- Rest of the GBS employers



Voice of employees¹

What works	Challenges/Grievances	Observations
<ul style="list-style-type: none">Offering competitive salary packages with flexible compensation optionsEnsuring regular compensation adjustments and transparent salary bandsImplementing holistic wellness initiatives, including gym memberships, health screenings, and mental health supportProviding comprehensive healthcare coverage, including medical insurance for employees and their familiesImplementing formal recognition programs, peer-to-peer recognition systems, and rewards for outstanding performance	<ul style="list-style-type: none">Inadequate salary increases falling below industry benchmarksRequirement for standardized compensation structures across similar roles/competenciesAbsence of compensation for overtime hours workedReduction in benefits such as transportation services to and from the officeIneffective communication regarding available benefitsLimited or inconsistent options for leave encashment	<ul style="list-style-type: none">Employees increasingly desire GBS employers to conduct periodic market studies and implement timely compensation revisions to stay competitiveThe average score in this area has declined by ~3% from the previous year, signaling a marginal decrease attributed to insufficient action by employersFurther, the gap between top GBS employers and others in terms of compensation and benefits has widened from ~35% to ~43% in 2024

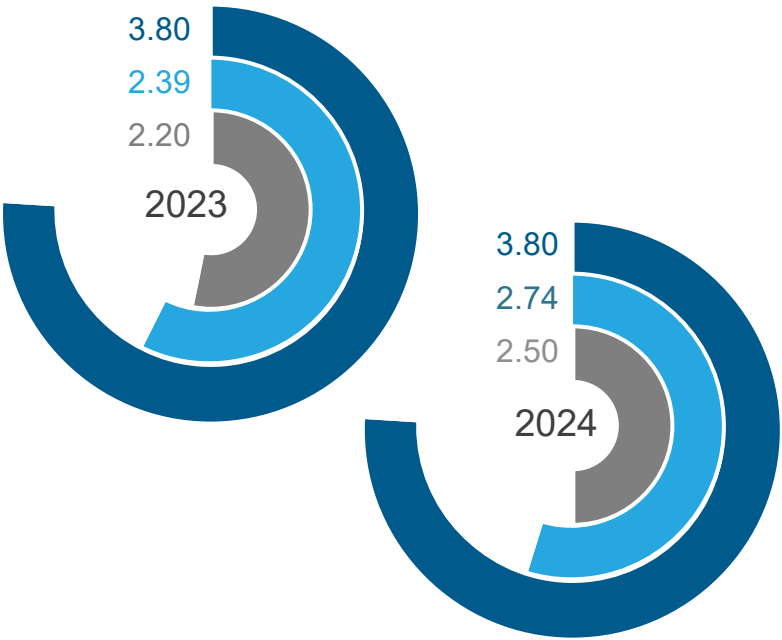
¹ Voice of employees is representative of employee sentiments on employee review portals, social media, and internet
Source: Various publicly available data sources such as global, regional, and local employee forums, job posting websites, social media, professional media, and Everest Group (2024) analysis

Insights on perceived strengths of different EVP levers – India (page 2 of 4)

Work environment

Work environment

- Top GBS employers
- Overall average
- Rest of the GBS employers



Voice of employees¹

What works	Challenges/Grievances	Observations
<ul style="list-style-type: none">Offering flexible work hours, remote work options, or compressed workweeksMental health training, programs such as mindfulness programs, or free counseling to manage stressFostering increased autonomy and challenging projects, guided by empowering leadership focused on expanding capabilitiesEncouraging volunteerism, participation in community service projects, or engagement in corporate social responsibility initiatives	<ul style="list-style-type: none">Enforcing mandatory office returns or abolishing work-from-home policiesNeed for enhanced project portfolio diversificationLack of capacity for prompt and flexible decision-making within management ranksWork cultures characterized by micromanagement or a lack of autonomy in decision-makingWorkspaces that are siloed or lack opportunities for collaboration and communication among teams	<ul style="list-style-type: none">The shift toward a hybrid work model and increased flexibility in WFH policies, including paid time off, reflects changing attitudes among GBS employees in IndiaThe average score in this dimension has fallen by ~5% compared to the previous yearThe gap between top GBS employers and rest of the GBS employers in term of work environment has narrowed down from ~72% to ~52% in 2024

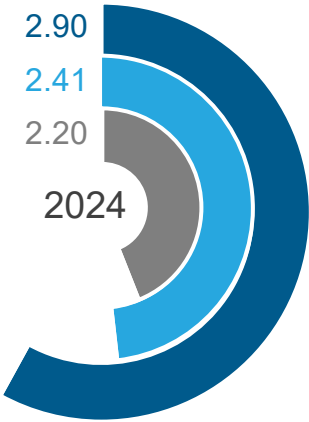
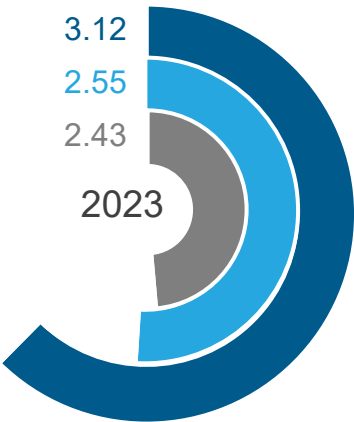
¹ Voice of employees is representative of employee sentiments on employee review portals, social media, and internet
Source: Various publicly available data sources such as global, regional, and local employee forums, job posting websites, social media, professional media, and Everest Group (2024) analysis

Insights on perceived strengths of different EVP levers – India (page 3 of 4)

Career development

Career development

- Top GBS employers
- Overall average
- Rest of the GBS employers



Voice of employees¹

What works	Challenges/Grievances	Observations
<ul style="list-style-type: none">Establishing clear career pathing frameworks and individual development plansProviding tailored structured training programs, workshops, and certifications that address skill gapsEstablishing transparent promotion criteria and recognition policies based on meritocracy and performanceProviding leadership development programs and succession planning initiativesPromoting involvement in professional associations, industry conferences, and networking events	<ul style="list-style-type: none">Limited availability of internal mobility options, including opportunities for job rotations and involvement in cross-functional projectsRestricted growth prospects within specific industries, hindering career advancing opportunities for employeesInadequate focus on developing leadership and management skillsJob uncertainty and the occurrence of layoffs diminish the attractiveness and perceived value of current and prospective employment opportunities	<ul style="list-style-type: none">GBS employers in India demonstrate transparent career paths, development opportunities, and fair appraisal cycles to support employee career growthHowever, due to perceived slower growth opportunities, GBS employers in India have experienced a ~6% decline in ratings for this dimension compared to 2023The gap between ratings for the top GBS employers and the rest of the GBS employers has increased this year, with a ~32% difference observed, as opposed to ~28% in 2023

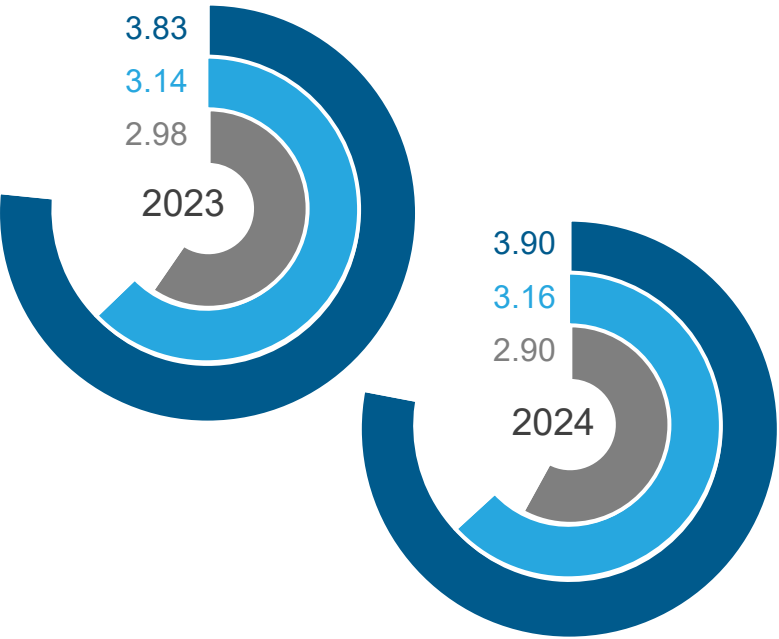
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Source: Various publicly available data sources such as global, regional, and local employee forums, job posting websites, social media, professional media, and Everest Group (2024) analysis

Insights on perceived strengths of different EVP levers – India (page 4 of 4)

Diversity and inclusion

Diversity and inclusion

- Top GBS employers
- Overall average
- Rest of the GBS employers



Voice of employees¹

What works	Challenges/Grievances	Observations
<ul style="list-style-type: none">Establishing employee resource groups dedicated to nurturing a culture of acceptance and representationConducting regular diversity and inclusion training programs for all employeesInstitutionalizing diversity champions or role models within the organization to actively promote inclusionImplementing flexible policies and benefits that accommodate diverse needs, such as parental leave, religious accommodations, and accessible facilities	<ul style="list-style-type: none">Need to cultivate deeper understanding and consciousness within the core teamGap in formalizing support structures aimed at fostering diversity across various spectrums within the workforceFailure of D&I initiatives to adequately tackle unconscious bias, discrimination, or microaggressions in the workplace	<ul style="list-style-type: none">Employees consistently rank diversity as important, yet it is rarely emphasized as a primary factor for enhancing EVPDespite a slight increase in average scores, the lack of diversity and inclusion among immediate team members, and their unawareness of this issue, remains a problemThe gap between top GBS employers and the rest widened from ~29% to ~35% in 2024, indicating positive changes and initiatives among leading GBS employers

¹ Voice of employees is representative of employee sentiments on employee review portals, social media, and internet
Source: Various publicly available data sources such as global, regional, and local employee forums, job posting websites, social media, professional media, and Everest Group (2024) analysis

Assessment of the top GBS employers over time – India

While top performers are consolidating their positions, there is still a considerable gap in brand perception improvement efforts among lower-tier GBS employers

Performance trends of top 20 percentile GBS employers

2022-23 2023-24
59% vs. 75% ●

Retained position as top GBS employer

41% vs. 25% ↓

Deterioration in brand perception;
no longer a top GBS employer

Performance trends of 20th to 50th percentile GBS employers

2022-23 2023-24
53% vs. 50% ●

Retained position in similar quadrant

29% vs. 26% ↓

Deterioration in GBS brand perception,
dropped to bottom 50% GBS employer

18% vs. 24% ↑

Improvement in GBS brand perception;
moved to top GBS employers list

Performance trends of bottom 50% GBS employers

2022-23 2023-24
79% vs. 76% ●

Limited/No change in GBS brand perception

19% vs. 23% ↑

Improvement in GBS brand perception;
moved up by one category

02% vs. 01% ↑

Significant improvement in GBS brand perception;
moved to top GBS employers list

↓ Decline ● No change ↑ Improvement

According to our assessment:

- The top 20 percentile GBS employers exhibit higher retention rates, signaling a trend of consolidation as they continue to actively improve their EVP competitiveness
- A higher churn is observed in the 20th to 50th percentile of GBS employers, with 50% GBS employers retaining their position in the quadrant
- The bottom 50% GBS employers remain static in brand perception, with modest improvements and few significant strides into the top tier

Note: A few data points of the Top GBS Employers™ 2022 report have been updated post publishing

Source: Various publicly available data sources such as global, regional, and local employee forums, job posting websites, social media, professional media, and Everest Group (2024) analysis

Comparative assessment across industries – India (page 1 of 3)

Employer brand perception and perceived success in the talent market

Aggregate ratings on factors contributing to EVP

↑ 1-5% increase ↑↑ >5% increase ● -1 to 1% change
 ↓ 1-5% decrease ↓↓ >5% decrease — Average

Category/Industry	Employer brand perception 2024	Change compared to 2023	Perceived success in the talent market 2024	Change compared to 2023	Comments
Top GBS employers	3.46	↓	3.64	●	<ul style="list-style-type: none"> The overall employer brand perception among GBS employers in India decreased by ~3% in 2024, except in the telecom sector The RCPG industry showed the highest volatility in employer brand perception, followed by professional services and the BFS industry To counter the declining trend in employer brand perception, GBS employers in India should analyze trends across various EVP factors and implement effective talent management strategies Most industries have seen stable or increased success in the talent market, indicating minimal challenges in attracting or hiring talent
BFS	2.65	↓	3.04	●	
Insurance	2.65	●	3.12	↑	
HLS	2.84	↓	3.36	↑↑	
RCPG	2.67	↓↓	2.90	↓	
Technology and information services	2.73	↓	3.11	↑↑	
Telecom	3.07	↑	3.25	●	
Professional services	2.35	↓↓	2.52	↓↓	
MLEUO ¹	2.51	↓	2.98	↑	
	2.68		3.04		

¹ MLEUO includes Manufacturing, Logistics and Transportation, Energy and Utility, and Other industry verticals

Source: Various publicly available data sources such as global, regional, and local employee forums, job posting websites, social media, professional media, and Everest Group (2024) analysis

Comparative assessment across industries – India (page 2 of 3)

Compensation and benefits and work environment

Aggregate ratings on factors contributing to employer brand perception

↑ 1-5% increase ↑↑ >5% increase ● -1 to 1% change
 ↓ 1-5% decrease ↓↓ >5% decrease — Average

Category/Industry	Compensation and benefits 2024	Change compared to 2023	Work environment 2024	Change compared to 2023	Comments
Top GBS employers	3.30	●	3.80	●	<ul style="list-style-type: none"> Most industries saw a decline in compensation and benefits, with the RCPG industry experiencing the most significant decrease. The telecom industry was the only sector with a positive improvement in 2024 Compensation and benefits dropped by ~3%, and the work environment declined by ~4% on an overall average Work environment ratings continued to decline in 2024, though less than in 2023, indicating ongoing effects of the return to office Ratings for the top GBS employers remained stable across compensation and benefits and work environment, showing limited or no change from the previous year
BFS	2.51	↓	2.60	↓↓	
Insurance	2.31	↓	2.94	↑	
HLS	2.72	↓	2.94	↓↓	
RCPG	2.68	↓↓	2.66	↓↓	
Technology and information services	2.50	↓	2.89	●	
Telecom	2.95	↑	3.14	↓	
Professional services	2.25	↓	2.00	↓↓	
MLEUO ¹	2.36	↓	2.71	●	
	2.53		2.74		

¹ MLEUO includes Manufacturing, Logistics and Transportation, Energy and Utility, and Other industry verticals

Source: Various publicly available data sources such as global, regional, and local employee forums, job posting websites, social media, professional media, and Everest Group (2024) analysis

Comparative assessment across industries – India (page 3 of 3)

Career development and diversity and inclusion

Aggregate ratings on factors contributing to employer brand perception

↑ 1-5% increase ↑↑ >5% increase ● -1 to 1% change
 ↓ 1-5% decrease ↓↓ >5% decrease — Average

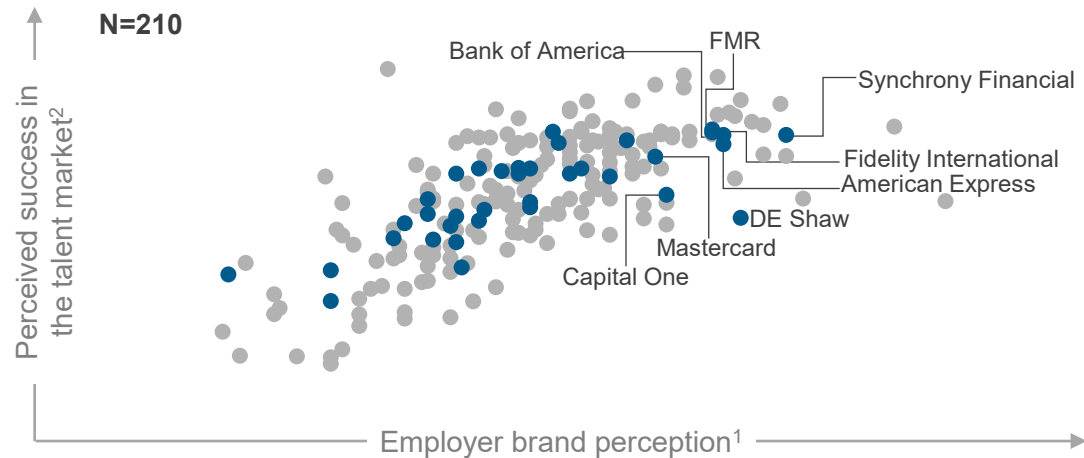
Category/Industry	Career development 2024	Change compared to 2023	Diversity and inclusion 2024	Change compared to 2023	Comments
Top GBS employers	2.90	↓↓	3.90	↑	<ul style="list-style-type: none"> Career development is rated the lowest among all EVP levers, with significant declines across all industries due to rapid technological changes and a perceived skills gap The overall average and top GBS employers saw a ~6% decline in career development ratings, with significant drops in the RCPG and HLS sectors, indicating widespread challenges Diversity and inclusion continues to remain the highest-rated EVP lever, despite limited overall improvement. Some industries such as HLS, insurance, and telecom that saw significant declines in 2023 have shown positive changes in this dimension
BFS	2.35	↓↓	3.24	↓	
Insurance	2.39	↓↓	3.14	↑	
HLS	2.33	↓↓	3.41	↑↑	
RCPG	2.24	↓↓	3.10	↓	
Technology and information services	2.46	↑	3.22	↑	
Telecom	2.82	●	3.45	●	
Professional services	2.42	↓↓	2.92	↓	
MLEUO ¹	2.27	↓↓	2.79	↓	
	2.41		3.16		

¹ MLEUO includes Manufacturing, Logistics and Transportation, Energy and Utility, and Other industry verticals

Source: Various publicly available data sources such as global, regional, and local employee forums, job posting websites, social media, professional media, and Everest Group (2024) analysis

Industry-specific insights – India (page 1 of 8)

BFS



- In 2024, BFS GBS employers dominated the top GBS employers list, holding **20% share among the top quadrant**
- Established leaders such as **American Express, Bank of America, and Synchrony Financial** have retained their top GBS employer position for the third consecutive year
- Most BFS players are **concentrated in the middle spectrum** of employer brand perception, with few in the bottom quadrant
- The overall employer brand perception of the BFS industry **declined slightly, with a 5% decrease from the previous year**
- Career development and work environment experienced **significant declines of ~8% and ~7%, respectively**, compared to the previous year

	Perceived success in the talent market²	Employer brand perception¹	Compensation and benefits	Work environment	Career development	Diversity and inclusion
2024 rating	3.04	2.65	2.51	2.60	2.35	3.24
2023 rating	3.04	2.78	2.61	2.79	2.56	3.28
2022 rating	3.05	2.91	2.40	3.17	2.95	3.45

¹ Employer brand perception incorporates the weighted score for employee sentiments across factors such as compensation and benefits, work environment (office ecosystem, work-life balance, hybrid work policies, culture and values, leadership, etc.), career development, and diversity and inclusion

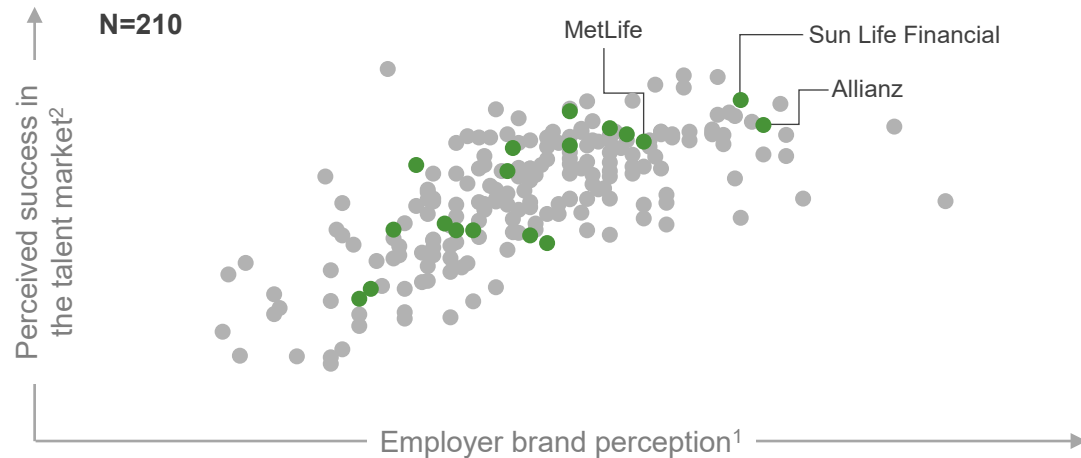
² Perceived success in the talent market incorporates the weighted score for outcomes such as employee attrition, net gain-loss of talent, and employee satisfaction scores

Note: A few data points of the Top GBS Employers™ 2022 report have been updated post publishing

Source: Various publicly available data sources such as global, regional, and local employee forums, job posting websites, social media, professional media, and Everest Group (2024) analysis

Industry-specific insights – India (page 2 of 8)

Insurance



- Insurance GBS employers make up **7% of the top GBS employer list**, indicating consistent performance and enhanced brand perception
- Despite a slight **decline of ~1% in the overall employer brand perception**, insurance GBS employers have seen a **~5% increase in perceived success in the talent market rating**
- Although there are **improvements in work environment and diversity and inclusion ratings**, insurance GBS employers still **need to enhance their employer brand perception** further, as the industry average remains lower compared to the overall average
- Beyond the top GBS employers, the industry hosts a diverse array of employers, indicating **ample opportunities for growth and differentiation**

	Perceived success in the talent market²	Employer brand perception¹	Compensation and benefits	Work environment	Career development	Diversity and inclusion
2024 rating	3.12	2.65	2.31	2.94	2.39	3.14
2023 rating	2.99	2.67	2.38	2.91	2.53	3.00
2022 rating	2.94	2.58	1.96	3.17	2.58	3.13

¹ Employer brand perception incorporates the weighted score for employee sentiments across factors such as compensation and benefits, work environment (office ecosystem, work-life balance, hybrid work policies, culture and values, leadership, etc.), career development, and diversity and inclusion

² Perceived success in the talent market incorporates the weighted score for outcomes such as employee attrition, net gain-loss of talent, and employee satisfaction scores

Note: A few data points of the Top GBS Employers™ 2022 report have been updated post publishing

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Industry-specific insights – India (page 3 of 8)

HLS



- The HLS industry's share in the top GBS employers list has surged from **5% in 2023 to ~13% in 2024**, reflecting significant growth and influence
- **Agilent Technologies** maintains its position in the top quadrant alongside new entrants such as **Bristol-Myers Squibb, dsm-firmenich, Merck & Co, and Sanofi**
- HLS industry's **overall performance declined**, revealing a notable gap between top GBS employers and others
- **Employer brand perception dimensions are mostly down**, with **career development experiencing the sharpest decline** of ~12% compared to the previous year
- **Perceived success in talent market rating improved by ~11%** for HLS, marking the highest increase across all industries

	Perceived success in the talent market²	Employer brand perception¹	Compensation and benefits	Work environment	Career development	Diversity and inclusion
2024 rating	3.36	2.84	2.72	2.94	2.33	3.41
2023 rating	3.03	2.95	2.86	3.11	2.64	3.20
2022 rating	3.44	3.26	3.35	3.75	3.35	3.45

1 Employer brand perception incorporates the weighted score for employee sentiments across factors such as compensation and benefits, work environment (office ecosystem, work-life balance, hybrid work policies, culture and values, leadership, etc.), career development, and diversity and inclusion

2 Perceived success in the talent market incorporates the weighted score for outcomes such as employee attrition, net gain-loss of talent, and employee satisfaction scores

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Source: Various publicly available data sources such as global, regional, and local employee forums, job posting websites, social media, professional media, and Everest Group (2024) analysis

Industry-specific insights – India (page 4 of 8)

RCPG



- RCPG GBS employers constitute **~18% of the top GBS employer list in 2024**
- Leading companies such as **Mondelēz International, Target, General Mills**, and **Kimberly-Clark** have maintained their positions, while newcomers including **Kraft Heinz, eBay**, and **Coca-Cola** have joined the top quadrant
- The RCPG industry has **recorded a decline in all aspects of EVP**, with overall **employer brand perception scores decreasing by ~7%**, marking the steepest drop across industries
- **Struggles persist in maintaining and enhancing perceptions of the work environment and career development**, evidenced by respective rating declines of ~9% and ~13%

	Perceived success in the talent market ²	Employer brand perception ¹	Compensation and benefits	Work environment	Career development	Diversity and inclusion
2024 rating	2.90	2.67	2.68	2.66	2.24	3.10
2023 rating	2.99	2.88	2.85	2.92	2.57	3.18
2022 rating	3.21	3.01	3.24	2.94	2.94	3.29

1 Employer brand perception incorporates the weighted score for employee sentiments across factors such as compensation and benefits, work environment (office ecosystem, work-life balance, hybrid work policies, culture and values, leadership, etc.), career development, and diversity and inclusion

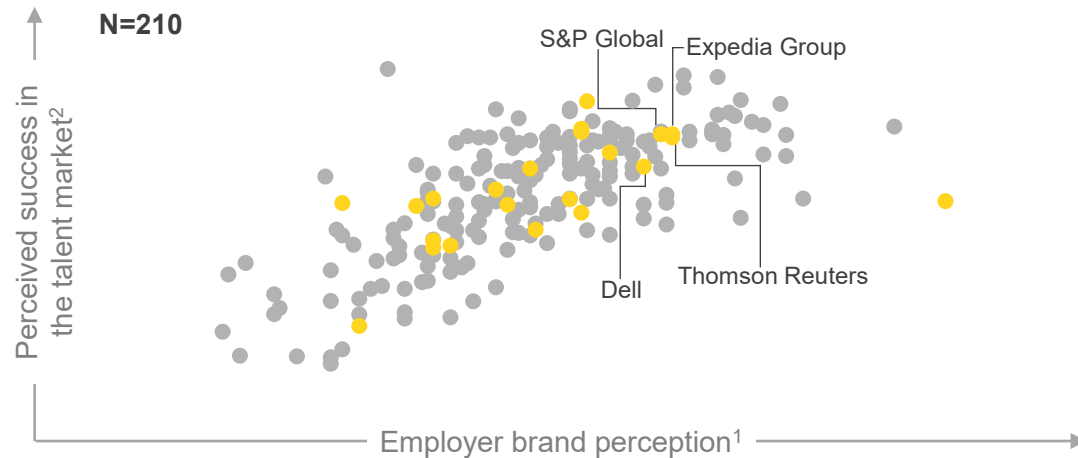
2 Perceived success in the talent market incorporates the weighted score for outcomes such as employee attrition, net gain-loss of talent, and employee satisfaction scores

Note: A few data points of the Top GBS Employers™ 2022 report have been updated post publishing

Source: Various publicly available data sources such as global, regional, and local employee forums, job posting websites, social media, professional media, and Everest Group (2024) analysis

Industry-specific insights – India (page 5 of 8)

Technology and information services



- Technology and information services GBS employers now **represent ~13% of the top GBS employers list in 2024**
- The **perceived success in the talent market rating** for the industry has **improved by ~6%** In 2024, indicating a notable increase
- VMware** emerges as the **leader in employer brand perception** within India, with **Expedia Group** and **Thomson Reuters** retaining their position in the top quadrant
- Over the past three years, **overall employer brand perception has seen a consistent decline**, although areas such as career development and diversity and inclusion have shown **moderate improvements**

	Perceived success in the talent market²	Employer brand perception¹	Compensation and benefits	Work environment	Career development	Diversity and inclusion
2024 rating	3.11	2.73	2.50	2.89	2.46	3.22
2023 rating	2.94	2.83	2.56	2.88	2.38	3.13
2022 rating	2.93	2.99	2.50	3.25	3.00	3.50

¹ Employer brand perception incorporates the weighted score for employee sentiments across factors such as compensation and benefits, work environment (office ecosystem, work-life balance, hybrid work policies, culture and values, leadership, etc.), career development, and diversity and inclusion

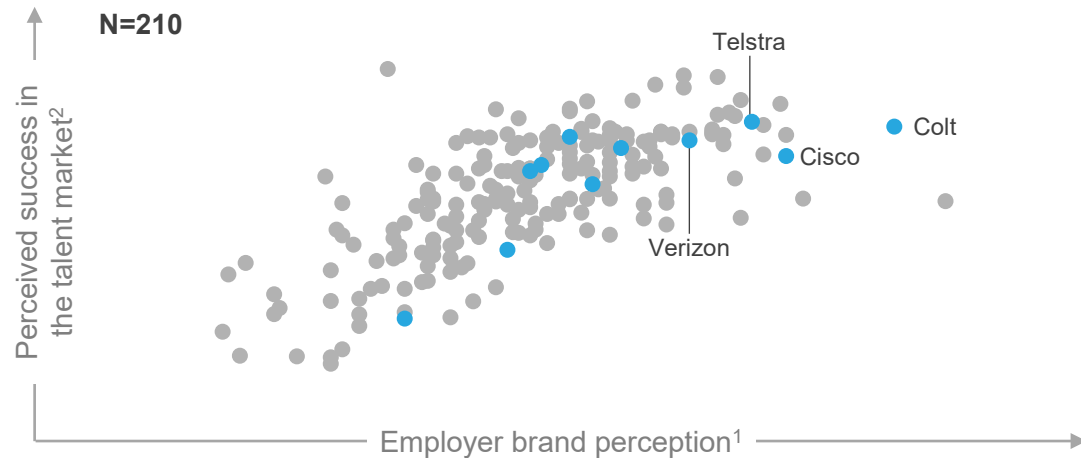
² Perceived success in the talent market incorporates the weighted score for outcomes such as employee attrition, net gain-loss of talent, and employee satisfaction scores

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Industry-specific insights – India (page 6 of 8)

Telecom



- The telecom industry accounts for **10% of the top GBS employers** in 2024
- This industry has the **highest employer brand perception rating** compared to other GBS industries, highlighting its attractiveness as an employer
- **Colt, Cisco Systems, and Verizon** have maintained their positions in the top quadrant, with **Telstra as a new entrant**
- The telecom sector has the **highest average perception ratings across all employer brand aspects** – compensation and benefits, work environment, career development, and diversity and inclusion, **showcasing its robustness**
- **Despite slight declines** in certain perception areas of work environment and career development, **year-on-year averages remain steady**

	Perceived success in the talent market²	Employer brand perception¹	Compensation and benefits	Work environment	Career development	Diversity and inclusion
2024 rating	3.25	3.07	2.95	3.14	2.82	3.45
2023 rating	3.23	3.00	2.85	3.23	2.85	3.42
2022 rating	3.17	3.16	3.00	3.13	3.25	3.38

¹ Employer brand perception incorporates the weighted score for employee sentiments across factors such as compensation and benefits, work environment (office ecosystem, work-life balance, hybrid work policies, culture and values, leadership, etc.), career development, and diversity and inclusion

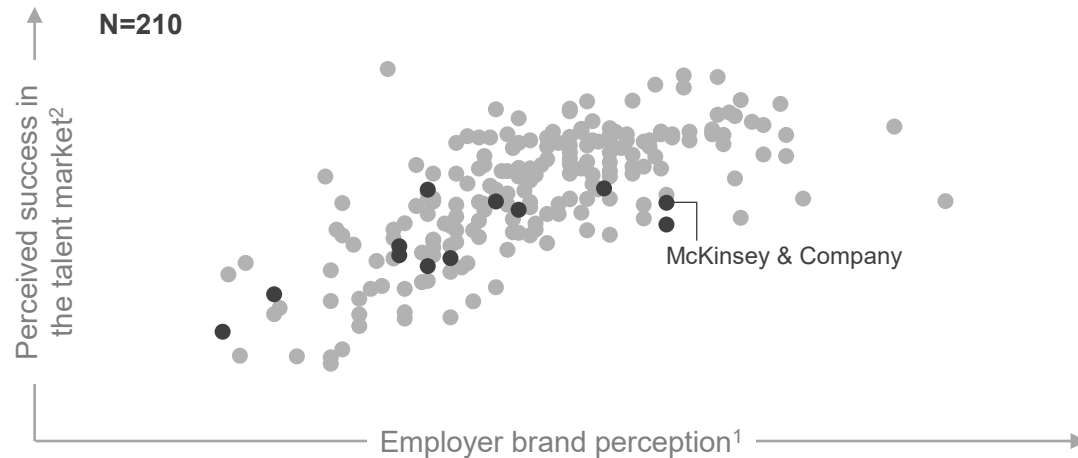
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Industry-specific insights – India (page 7 of 8)

Professional services



- **McKinsey & Company** stands as the sole representative from the professional services sector in the top GBS employers list for 2024, indicating a **challenging landscape for other firms in the industry**
- Similar to previous years, the professional services industry has experienced a further **decline of ~6% in both employer brand perception and perceived success in the talent market ratings**
- The industry faces a **significant setback in work environment**, with the lowest score across GBS industries in India
- Persistent issues such as **poor work-life balance** and **long working hours** remain the **top concerns among employees** in the professional services sector, contributing to a negative impact on overall brand perception

	Perceived success in the talent market²	Employer brand perception¹	Compensation and benefits	Work environment	Career development	Diversity and inclusion
2024 rating	2.52	2.35	2.25	2.00	2.42	2.92
2023 rating	2.69	2.50	2.31	2.25	2.56	3.06
2022 rating	2.66	2.61	2.40	2.10	3.30	3.20

¹ Employer brand perception incorporates the weighted score for employee sentiments across factors such as compensation and benefits, work environment (office ecosystem, work-life balance, hybrid work policies, culture and values, leadership, etc.), career development, and diversity and inclusion

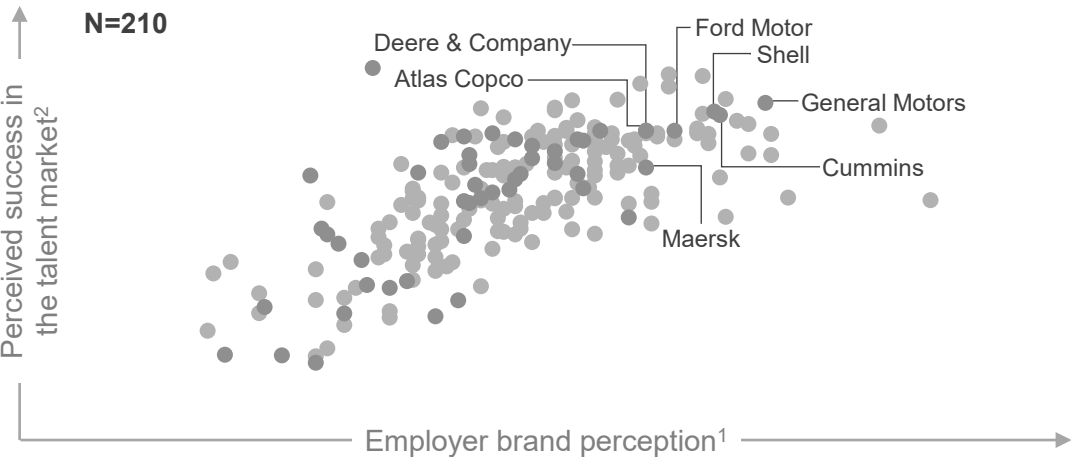
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Industry-specific insights – India (page 8 of 8)

MLEUO³



- MLEUO³ industry accounts for **~18% of the top GBS employers in 2024**, reflecting a significant presence within the sector, similar to the previous year
- **General Motors, Ford Motors, Shell, and Maersk** continue to maintain their positions in the top quadrant, showcasing **consistent performance and brand strength**. New entrants such as **Cummins, Deere & Company, and Atlas Copco** also join the quadrant
- Most MLEUO³ peers **struggle to improve their brand perception**, resulting in a lower overall employer brand perception average
- The industry scores the **lowest in diversity and inclusion**, trailing **~12% behind the average for GBS employers in India**, indicating a pressing need for improvement in this aspect

	Perceived success in the talent market²	Employer brand perception¹	Compensation and benefits	Work environment	Career development	Diversity and inclusion
2024 rating	2.98	2.51	2.36	2.71	2.27	2.79
2023 rating	2.94	2.57	2.39	2.73	2.42	2.86
2022 rating	3.01	2.46	1.91	2.79	2.62	2.85

1 Employer brand perception incorporates the weighted score for employee sentiments across factors such as compensation and benefits, work environment (office ecosystem, work-life balance, hybrid work policies, culture and values, leadership, etc.), career development, and diversity and inclusion

2 Perceived success in the talent market incorporates the weighted score for outcomes such as employee attrition, net gain-loss of talent, and employee satisfaction scores

3 MLEUO includes Manufacturing, Logistics and Transportation, Energy and Utility, and Other industry verticals

Note: A few data points of the Top GBS Employers™ 2022 report have been updated post publishing

Source: Various publicly available data sources such as global, regional, and local employee forums, job posting websites, social media, professional media, and Everest Group (2024) analysis

We assessed the following 210 companies' India-based GBS centers (page 1 of 3)

1	_VOIS	15	ANZ Bank	29	Becton Dickinson and Company	43	Caterpillar	57	Cummins
2	3M	16	AON	30	Blackrock	44	Chubb	58	Daimler
3	7-Eleven	17	Applied Materials	31	BNP Paribas	45	Cisco Systems	59	DB Schenker
4	Ab InBev	18	AstraZeneca	32	Boston Scientific	46	Citco Group	60	DE Shaw Group
5	ABB Group	19	Atlas Copco Group	33	BP	47	Citigroup	61	Deere & Company
6	Agilent Technologies	20	AXA	34	Bristol-Myers Squibb	48	Clariant	62	Dell Technologies
7	Aker Solutions	21	AXA XL	35	Broadcom	49	Clean Harbors	63	Deloitte
8	AkzoNobel	22	Bain & Company	36	BT	50	Clifford Chance	64	Deutsche Bank
9	Alcon	23	Baker Hughes	37	Bunge	51	Coca-Cola	65	Deutsche Telekom
10	Allianz	24	Bank of America	38	Capital One	52	CohnReznik	66	Diageo
11	Allstate Corporation	25	Bank of New York Mellon	39	Cardinal Health	53	Colgate-Palmolive	67	dsm-firmenich
12	Amazon	26	Barclays	40	Carelon Global Solutions	54	Collins Aerospace	68	Dun & Bradstreet
13	American Express	27	Baxter	41	Cargill	55	Colt Group	69	DuPont
14	Ameriprise Financial	28	BDO	42	Carrier Global	56	Continental	70	Eaton Corporation

We assessed the following 210 companies' India-based GBS centers (page 2 of 3)

71	eBay	85	First American	99	Guardian Life Insurance	113	JPMorgan Chase	127	Mashreq
72	Eli Lilly	86	Fiserv	100	Halliburton	114	Kimberly-Clark Corporation	128	MassMutual
73	Emerson Electric	87	Ford Motor	101	Hitachi Energy	115	Kohler	129	MasterCard International
74	Equifax	88	Franklin Templeton Investments	102	Honeywell International	116	KPMG	130	McKinsey & Company
75	Ericsson	89	Gallagher	103	HP	117	Kraft Heinz	131	Medtronic
76	Ernst & Young	90	Gartner	104	HSBC	118	Landmark Group	132	Mercedes-Benz
77	Expedia Group	91	General Electric	105	Huawei	119	London Stock Exchange	133	Mercer
78	ExxonMobil	92	General Mills	106	Hudson's Bay Company	120	L'Oreal	134	Merck & Co
79	FactSet	93	General Motors	107	Hyundai Motor	121	Lowe's	135	MetLife
80	Falabella	94	Goldman Sachs	108	IKEA	122	Macquarie Group	136	Michelin
81	Fidelity International	95	Grant Thornton	109	Infor	123	Maersk	137	Microchip Technology
82	Fidelity Investments	96	Groupe Danone	110	Johnson & Johnson	124	MANN+HUMMEL Group	138	Mondelez International
83	Fidelity National Financial	97	Groupon	111	Johnson Controls	125	Mars	139	Morgan Stanley
84	Finastra	98	GSK	112	Jones Lang LaSalle	126	Marsh & McLennan Companies	140	NatWest

We assessed the following 210 companies' India-based GBS centers (page 3 of 3)

141	NCR	155	PricewaterhouseCoopers	169	Sandoz	183	Syngenta	197	Valvoline
142	Nestlé	156	Principal Financial Group	170	Sanofi	184	Synopsys	198	Verizon Communications
143	Nissan	157	Procter & Gamble	171	Saxo Bank	185	Target	199	Vertiv
144	Nomura Holdings	158	Providence	172	Schneider Electric	186	TE Connectivity	200	Viasat
145	Northern Trust	159	Qualcomm	173	Sears	187	Telstra	201	Visteon
146	Novartis	160	Rakuten	174	Siemens	188	Tesco	202	VMware
147	Novo Nordisk	161	Reckitt Benckiser	175	Smith & Nephew	189	Thermo Fisher Scientific	203	Wabco
148	Olam Group	162	Renault Group	176	Societe Generale	190	Thomson Reuters	204	Walmart
149	Optum	163	Robert Bosch	177	Standard Chartered Group	191	Thryve	205	Wells Fargo & Company
150	Oracle	164	Roche	178	State Street Corporation	192	TIAA	206	Willis Towers Watson
151	PepsiCo	165	Rolls-Royce	179	Stryker Corporation	193	TotalEnergies	207	WM
152	Pernod Ricard	166	Royal Dutch Shell	180	Sun Life Financial	194	Transunion	208	Wolters Kluwer
153	Pfizer	167	S&P Global	181	Swiss Re	195	UBS	209	Worley
154	Philips	168	Sabre Corporation	182	Synchrony Financial	196	Unilever	210	XPO Logistics

Top GBS Employers™ in in key talent markets

The Philippines

Everest Group Top GBS Employers™ 2024

Scorecards of top GBS employers

Insights on perceived strengths of different EVP levers

- Compensation and benefits
- Work environment
- Career development
- Diversity and inclusion

Assessment of the top GBS employers over time

Comparative assessment across industries

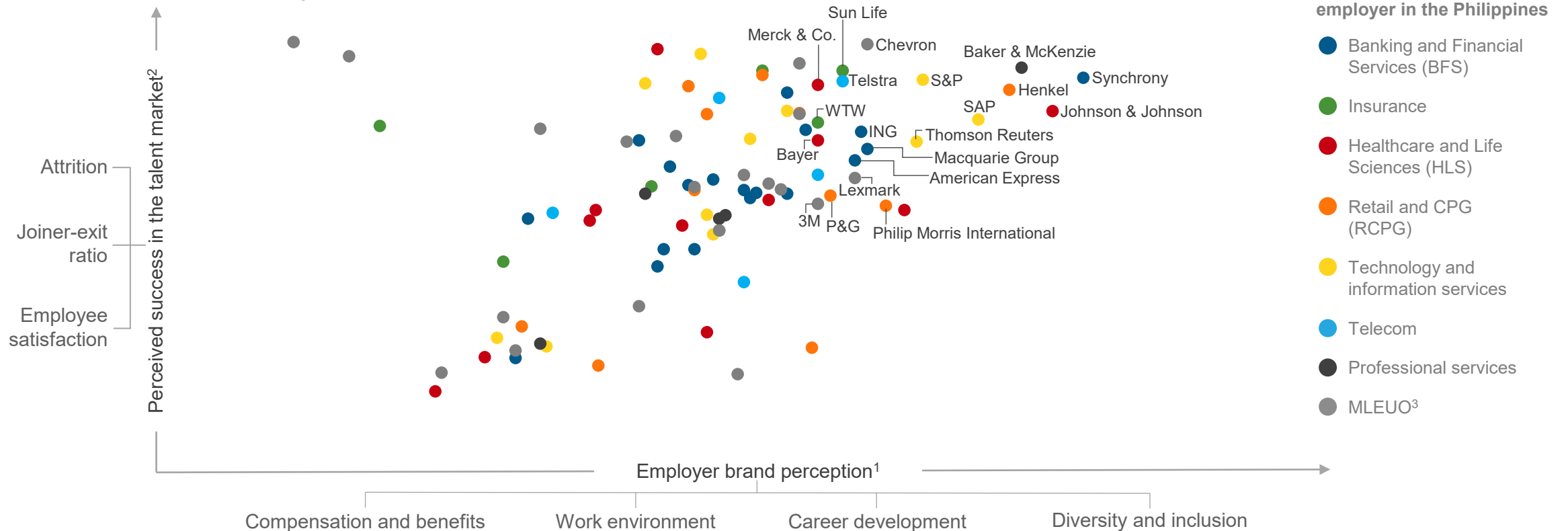
Industry-specific insights

List of GBS employers analyzed

The Poland

Everest Group Top GBS Employers™ 2024 – the Philippines

Everest Group Top GBS Employers™ 2024 – the Philippines, N⁴= 90



¹ Employer brand perception incorporates the weighted score for employee sentiments across factors such as compensation and benefits, work environment (office ecosystem, work-life balance, hybrid work policies, culture and values, leadership, etc.), career development, and diversity and inclusion

² Perceived success in the talent market incorporates the weighted score for outcomes such as employee attrition, net gain-loss of talent, and employee satisfaction scores

³ MLEUO includes Manufacturing, Logistics and Transportation, Energy and Utility, and Other industry verticals

⁴ N = number of companies in the analysis


Note: GBS employers in Philippines of the mentioned companies have been identified as the top GBS employers in 2024

Source: This analysis is based on various publicly available data sources such as global, regional, and local employee forums, job posting websites, social media, professional media, and Everest Group (2024) analysis

Everest Group Top GBS Employers™ 2024 – the Philippines (page 1 of 2)

Top 20 GBS employers

Attrition	Joiner-exit ratio
Low (<5%)	Highly favorable
Moderate (9-12%)	Favorable, some concerns
High (>15%)	Least favorable

unfavorable  Highly favorable

Company ³	EMPLOYER BRAND PERCEPTION ¹				PERCEIVED SUCCESS IN THE TALENT MARKET ²		
	Compensation and benefits	Work environment	Career development	Diversity and inclusion	Attrition	Joiner-exit ratio	Employee satisfaction grade
3M	💰💰💰💰💰	🏢🏢🏢🏢	★ ★ ★ ☆ ☆ ☆	🤝🤝🤝🤝🤝	🔴	🟡🟠	B+
American Express	💰💰💰💰💰	🏢🏢🏢🏢	★ ★ ★ ☆ ☆ ☆	🤝🤝🤝🤝🤝	🟡🟠	🟡	A
Bayer & McKenzie	💰💰💰💰💰	🏢🏢🏢🏢	★ ★ ☆ ☆ ☆ ☆	🤝🤝🤝🤝🤝	🟢🟡	🟡	A+
Bayer	💰💰💰💰💰	🏢🏢🏢🏢	★ ★ ★ ☆ ☆ ☆	🤝🤝🤝🤝🤝	🟢🟡	🟡	A
Chevron	💰💰💰💰💰	🏢🏢🏢🏢	★ ★ ★ ☆ ☆ ☆	🤝🤝🤝🤝🤝	🟢	🟢	A+
Henkel	💰💰💰💰💰	🏢🏢🏢🏢	★ ★ ★ ★ ☆ ☆	🤝🤝🤝🤝🤝	🟢🟡	🟢	A+
ING Group	💰💰💰💰💰	🏢🏢🏢🏢	★ ★ ★ ★ ☆ ☆	🤝🤝🤝🤝🤝	🟡	🟢	A
Johnson & Johnson	💰💰💰💰💰	🏢🏢🏢🏢	★ ★ ★ ★ ☆ ☆	🤝🤝🤝🤝🤝	🟡	🟢🟡	A+
Lexmark International	💰💰💰💰💰	🏢🏢🏢🏢	★ ★ ★ ☆ ☆ ☆	🤝🤝🤝🤝🤝	🟢🟡	🟡🟠	B+
Macquarie Group	💰💰💰💰💰	🏢🏢🏢🏢	★ ★ ★ ★ ☆ ☆	🤝🤝🤝🤝🤝	🟡	🟡	A

1 Represents the aggregate rating of outside-in perception across parameters such as compensation and benefits, work environment (office ecosystem, work-life balance, hybrid work policies, culture and values, leadership, etc.), career development, and diversity and inclusion

2 Represents the aggregate ratings of parameters such as employee attrition, net gain-loss of talent, and employee satisfaction scores

3 GBS employer in the Philippines of the mentioned company

Source: Various publicly available data sources such as global, regional, and local employee forums, job posting websites, social media, professional media, and Everest Group (2024) analysis

Top 20 GBS employers

Highly unfavorable —○—○—○—○—○▶ Highly favorable

Company ³	EMPLOYER BRAND PERCEPTION ¹				PERCEIVED SUCCESS IN THE TALENT MARKET ²		
	Compensation and benefits	Work environment	Career development	Diversity and inclusion	Attrition	Joiner-exit ratio	Employee satisfaction grade
Merck & Co	💰💰💰💰💰	🏢🏢🏢🏢🏢	★ ★ ★ ★ ★	🤝🤝🤝🤝🤝	🟡	🟡	A+
Philip Morris International	💰💰💰💰💰	🏢🏢🏢🏢🏢	★ ★ ★ ★ ★	🤝🤝🤝🤝🤝	🟡	🟢	B
Procter & Gamble	💰💰💰💰💰	🏢🏢🏢🏢🏢	★ ★ ★ ★ ★	🤝🤝🤝🤝🤝	🟡	🟢	B
S&P Global	💰💰💰💰💰	🏢🏢🏢🏢🏢	★ ★ ★ ★ ★	🤝🤝🤝🤝🤝	🟢	🟢	A+
SAP	💰💰💰💰💰	🏢🏢🏢🏢🏢	★ ★ ★ ★ ★	🤝🤝🤝🤝🤝	🟢	🟢	A
Sun Life Financial	💰💰💰💰💰	🏢🏢🏢🏢🏢	★ ★ ★ ★ ★	🤝🤝🤝🤝🤝	🟢	🟡	A+
Synchrony Financial	💰💰💰💰💰	🏢🏢🏢🏢🏢	★ ★ ★ ★ ★	🤝🤝🤝🤝🤝	🟡	🟢	A+
Telstra	💰💰💰💰💰	🏢🏢🏢🏢🏢	★ ★ ★ ★ ★	🤝🤝🤝🤝🤝	🟢	🟢	A+
Thomson Reuters	💰💰💰💰💰	🏢🏢🏢🏢🏢	★ ★ ★ ★ ★	🤝🤝🤝🤝🤝	🟡	🟢	A
Willis Towers Watson	💰💰💰💰💰	🏢🏢🏢🏢🏢	★ ★ ★ ★ ★	🤝🤝🤝🤝🤝	🟢	🟢	A

2 Represents the aggregate ratings of parameters such as employee attrition, net gain-loss of talent, and employee satisfaction scores

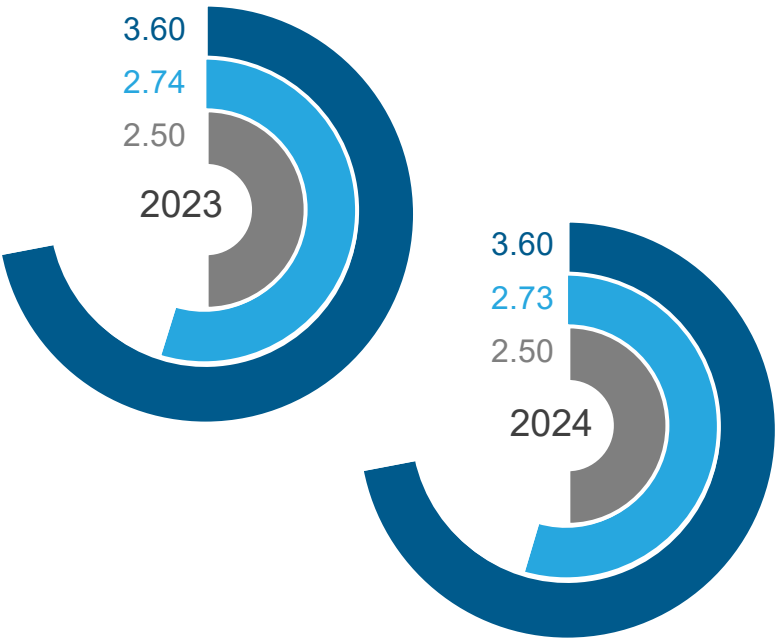
Source: Various publicly available data sources such as global, regional, and local employee forums, job posting websites, social media, professional media, and Everest Group (2024) analysis

Insights on perceived strengths of different EVP levers – the Philippines (page 1 of 4)

Compensation and benefits

Compensation and benefits

- Top GBS employers
- Overall average
- Rest of the GBS employers



Voice of employees¹

What works

- Offering competitive base salaries matching industry standards with cost-of-living adjustments, thus ensuring fair compensation
- Implementing performance-based incentives such as bonuses, profit-sharing, or performance-related pay rewards
- Providing comprehensive benefits such as healthcare coverage, retirement plans, and various wellness programs
- Providing transportation allowances or shuttle services for employees who commute to the office

Challenges/Grievances

- Compensation failing to align with workload and responsibilities, causing dissatisfaction
- Offering minimal or no retirement benefits, such as provident funds or pension plans
- Failing to effectively communicate available benefits
- Providing limited or insufficient health benefits coverage, including medical insurance, dental care, or mental health support services

Observations

- Perception of compensation and benefits for GBS employees in the Philippines has remained **consistent with 2023, showing no change**
- Leading GBS employers in the Philippines are perceived to provide **comprehensive benefit packages and fair compensation** relative to employee workload and responsibilities
- The gap between top GBS employers and others in terms of compensation and benefits has remained steady at **~44%** compared to the previous year

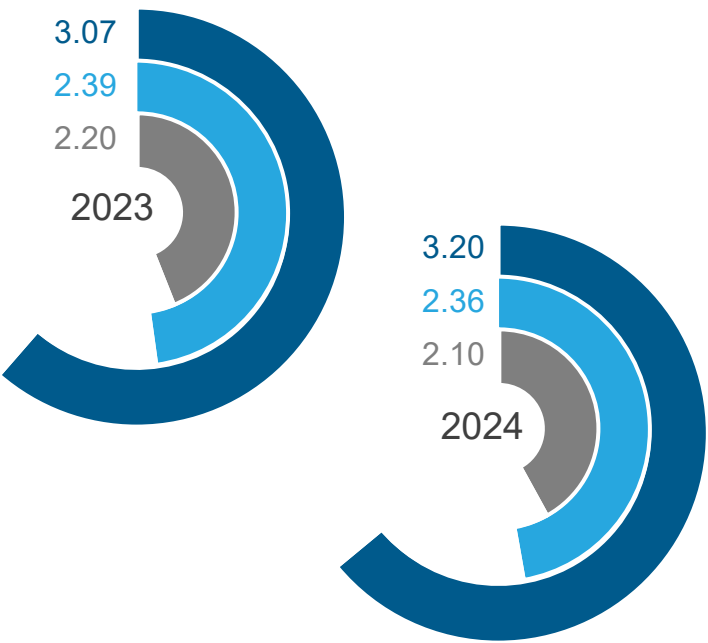
¹ Voice of employees is representative of employee sentiments on employee review portals, social media, and internet
Source: Various publicly available data sources such as global, regional, and local employee forums, job posting websites, social media, professional media, and Everest Group (2024) analysis

Insights on perceived strengths of different EVP levers – the Philippines (page 2 of 4)

Work environment

Work environment

- Top GBS employers
- Overall average
- Rest of the GBS employers



Voice of employees¹

What works	Challenges/Grievances	Observations
<ul style="list-style-type: none">Maintaining recognition programs that empower employees to formally acknowledge each other’s contributionEquipping office facilities with amenities such as cafeterias, recreational areas, and meeting roomsEmpowering leaders to develop talent through challenging projects and granting autonomyImplementing flexible WFH policies without enforcing mandatory office returnsMaintaining transparent and open communication channels	<ul style="list-style-type: none">Lacking overtime benefits and not recognizing or rewarding long working hoursDisregarding work-life balance during crucial assignments and projectsExercising excessive oversight, restricting decision-making autonomy, and fostering internal political dynamicsCharacterizing work environments with excessive micromanagementMaking inadequate efforts to engage employees in meaningful activities and programs	<ul style="list-style-type: none">Employees value flexible working options, engagement activities, and effective onboarding, but show resistance to mandatory office returnsGBS employers are focused on increasing employee engagement and actively reducing burnout and overutilizationThe gap in ratings between top GBS employers and others has widened to ~52% this year, up from ~40% in 2023

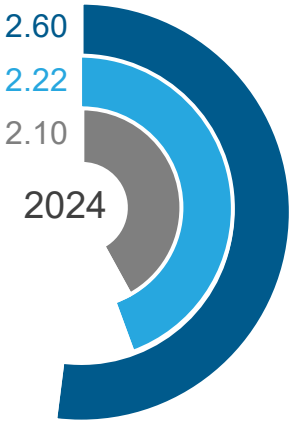
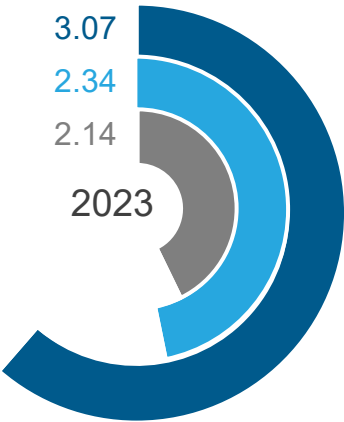
¹ Voice of employees is representative of employee sentiments on employee review portals, social media, and internet
Source: Various publicly available data sources such as global, regional, and local employee forums, job posting websites, social media, professional media, and Everest Group (2024) analysis

Insights on perceived strengths of different EVP levers – the Philippines (page 3 of 4)

Career development

Career development

- Top GBS employers
- Overall average
- Rest of the GBS employers



Voice of employees¹

What works	Challenges/Grievances	Observations
<ul style="list-style-type: none">Promoting job rotations, cross-functional projects, and internal transfersOffering structured training programs, workshops, and certifications tailored to specific job roles or skill gapsProviding financial support for further education, certifications, or professional coursesImplementing well-defined career paths and individual development plansOffering subscriptions or access to e-learning platforms where employees can take courses relevant to their career interests and job requirements	<ul style="list-style-type: none">Limited vertical growth within organizations, coupled with hierarchical structures and unclear career paths, hinders employee career progressA disconnect between employees' current skills and those required for growth impedes career developmentLayoffs impact the value proposition and attractiveness of organizations, affecting employee morale and retentionThe lack of emphasis on developing leadership and management skills inhibits employees' readiness for higher roles	<ul style="list-style-type: none">Perceptions of slow promotions and career growth persist among GBS employers, contributing to a continued decline in their ratingsThe top GBS employers have experienced a ~15% decrease in their ratings, highlighting a further decline in development opportunitiesThe gap between ratings for top GBS employers and the rest has narrowed from ~43% in 2023 to ~24% in 2024

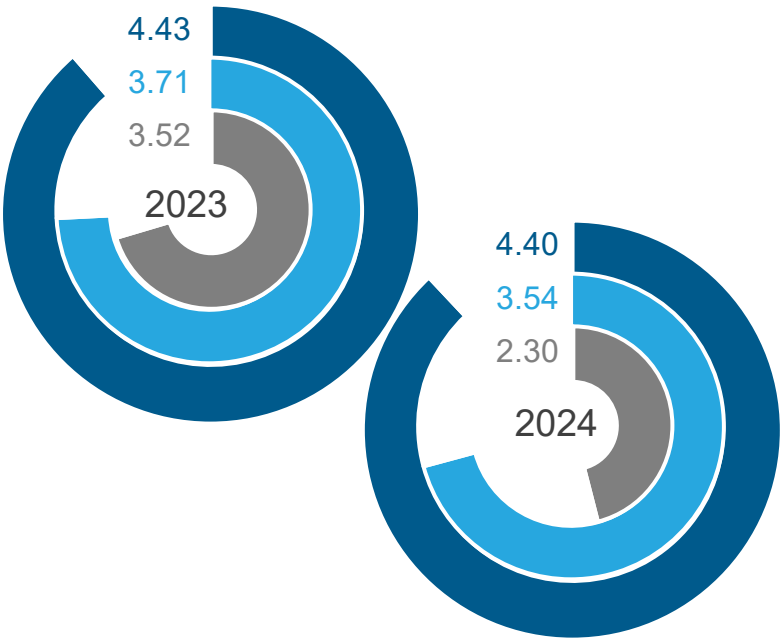
¹ Voice of employees is representative of employee sentiments on employee review portals, social media, and internet
Source: Various publicly available data sources such as global, regional, and local employee forums, job posting websites, social media, professional media, and Everest Group (2024) analysis

Insights on perceived strengths of different EVP levers – the Philippines (page 4 of 4)

Diversity and inclusion

Diversity and inclusion

- Top GBS employers
- Overall average
- Rest of the GBS employers



Voice of employees¹

What works	Challenges/Grievances	Observations
<ul style="list-style-type: none">Forming Employee Resource Groups (ERGs) to cultivate inclusivity and foster a sense of belonging for employees from diverse backgroundsEstablishing transparent and equitable policies for promotions, training, and professional development opportunitiesEducating hiring managers and recruiters on unconscious bias to ensure fair and objective candidate evaluations	<ul style="list-style-type: none">Lacking adequate representation across diversity dimensions, including race, ethnicity, age, disability, and LGBTQ+ identitiesExperiencing microaggressions, insensitive comments, or behaviors that make diverse employees feel unwelcome or marginalized	<ul style="list-style-type: none">Top GBS employers in the Philippines continue to score significantly higher in diversity and inclusion perceptionMany organizations are implementing initiatives to increase representation of women, LGBTQ+, and ethnically diverse backgroundsThe gap between ratings of top GBS employers and others has widened from ~26% to ~91% in 2024, driven by a significant drop in diversity scores for other employers

¹ Voice of employees is representative of employee sentiments on employee review portals, social media, and internet
Source: Various publicly available data sources such as global, regional, and local employee forums, job posting websites, social media, professional media, and Everest Group (2024) analysis

Assessment of the top GBS employers over time – the Philippines

The dynamic changes within the GBS sector in the Philippines indicates a competitive and potentially volatile environment where brand perceptions can fluctuate significantly

Performance trends of top 20 percentile GBS employers

2022-23 2023-24

75% vs. 60% ●

Retained position as top GBS employer

25% vs. 40% ↓

Deterioration in brand perception; no longer a top GBS employer

Performance trends of 20th to 50th percentile GBS employers

2022-23 2023-24

47% vs. 43% ●

Retained position in similar quadrant

33% vs. 33% ↓

Deterioration in GBS brand perception; dropped to bottom 50% GBS employer

20% vs. 24% ↑

Improvement in GBS brand perception; moved to top GBS employers list

Performance trends of bottom 50% GBS employers

2022-23 2023-24

69% vs. 65% ●

Limited/No change in GBS brand perception

25% vs. 29% ↑

Improvement in GBS brand perception; moved up by one category

06% vs. 06% ↑

Significant improvement in GBS brand perception; moved to top GBS employers list

↓ Decline ● No change ↑ Improvement

According to our assessment:

- The competitive landscape for the top 20 percentile of GBS employers is shifting, with **fewer maintaining their positions**. They **need more effective strategies** to retain their competitive edge
- The 20th to 50th percentile of GBS employers are **more stable**, **showing slight upward mobility** and improvement in brand perception
- The bottom 50% of GBS employers remain **largely static in brand perception**, with a **potential for improvement** by investing in initiatives to enhance their brand and competitive position

Note: A few data points of the Top GBS Employers™ 2022 report have been updated post publishing

Source: Various publicly available data sources such as global, regional, and local employee forums, job posting websites, social media, professional media, and Everest Group (2024) analysis

Comparative assessment across industries – the Philippines (page 1 of 3)

Employer brand perception and perceived success in the talent market

Aggregate ratings on factors contributing to EVP

↑ 1-5% increase ↑↑ >5% increase ● -1 to 1% change
 ↓ 1-5% decrease ↓↓ >5% decrease — Average

Category/Industry	Employer brand perception 2024	Change compared to 2023	Perceived success in the talent market 2024	Change compared to 2023	Comments
Top GBS employers	3.43	↓	3.64	↑	<ul style="list-style-type: none"> • Employer brand perception ratings have declined across all industries in the Philippines except for HLS and professional services, which saw positive changes • The BFS industry experienced the most significant decline in employer brand perception, followed by the RCPG industry • Overall perceived success in the talent market ratings has declined by ~6% in 2024, with all industries experiencing this decline • RCPG, insurance, and telecom industries showed the highest decline in perceived success in the talent market
BFS	2.79	↓↓	2.98	↓	
Insurance	2.49	↓↓	3.33	↓↓	
HLS	2.66	↑↑	2.72	↓	
RCPG	2.85	↓↓	2.92	↓↓	
Technology and information services	2.79	↓	3.16	↓	
Telecom	2.77	↓	3.15	↓↓	
Professional services	2.75	↑↑	2.75	↓	
MLEUO ¹	2.45	●	2.94	↓	
	2.69		2.99		

¹ MLEUO includes Manufacturing, Logistics and Transportation, Energy and Utility, and Other industry verticals

Source: Various publicly available data sources such as global, regional, and local employee forums, job posting websites, social media, professional media, and Everest Group (2024) analysis

Comparative assessment across industries – the Philippines (page 2 of 3)

Compensation and benefits and work environment

Aggregate ratings on factors contributing to employer brand perception

1-5% increase
 >5% increase
 -1 to 1% change
 1-5% decrease
 >5% decrease
 Average

Category/Industry	Compensation and benefits 2024	Change compared to 2023	Work environment 2024	Change compared to 2023	Comments
Top GBS employers	3.60		3.20		<ul style="list-style-type: none"> The overall average compensation and benefits ratings improved by ~4%, while work environment ratings remained stable compared to 2023 Except for the BFS and insurance industries, all others saw better compensation and benefits ratings, with professional services improving by ~41% from the last year In work environment ratings, BFS and RCPG experienced significant declines, whereas HLS and professional services showed notable improvement Ratings for top GBS employers remained stable for compensation and benefits, with a ~4% improvement in work environment
BFS	2.79		2.39		
Insurance	2.29		2.43		
HLS	2.79		2.17		
RCPG	3.41		2.14		
Technology and information services	2.82		2.62		
Telecom	2.80		2.50		
Professional services	2.60		2.30		
MLEUO ¹	2.33		2.30		
	2.73		2.36		

¹ MLEUO includes Manufacturing, Logistics and Transportation, Energy and Utility, and Other industry verticals

Source: Various publicly available data sources such as global, regional, and local employee forums, job posting websites, social media, professional media, and Everest Group (2024) analysis

Comparative assessment across industries – the Philippines (page 3 of 3)

Career development and diversity and inclusion

Aggregate ratings on factors contributing to employer brand perception

↑ 1-5% increase ↑↑ >5% increase ● -1 to 1% change
 ↓ 1-5% decrease ↓↓ >5% decrease --- Average

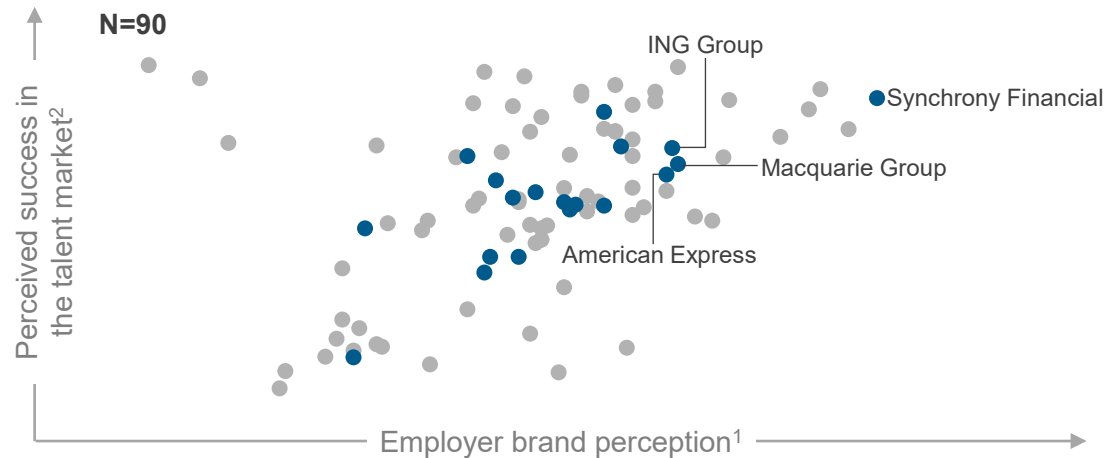
Category/Industry	Career development 2024	Change compared to 2023	Diversity and inclusion 2024	Change compared to 2023	Comments
Top GBS employers	2.60	↓↓	4.40	●	<ul style="list-style-type: none"> • Career development holds the lowest average perception among all EVP levers and has significantly declined since 2023, indicating widespread concern • Professional services, RCPG, telecom, and BFS industries have shown significant declines (>10%) in career development • Top GBS employers' career development ratings have decreased by ~16% this year, while their diversity and inclusion ratings remain stable • Diversity and inclusion is the least volatile EVP lever among Philippines GBS employers, showing very low correlation with other EVP levers
BFS	2.34	↓↓	3.71	↓↓	
Insurance	1.93	↓	3.50	↓↓	
HLS	2.08	↑↑	3.63	↑	
RCPG	2.32	↓↓	3.45	↓↓	
Technology and information services	2.27	↑	3.41	↓↓	
Telecom	2.10	↓↓	3.70	↓↓	
Professional services	2.70	↓↓	3.60	↓	
MLEUO ¹	2.03	↓	3.30	●	
	2.22		3.54		

¹ MLEUO includes Manufacturing, Logistics and Transportation, Energy and Utility, and Other industry verticals

Source: Various publicly available data sources such as global, regional, and local employee forums, job posting websites, social media, professional media, and Everest Group (2024) analysis

Industry-specific insights – the Philippines (page 1 of 8)

BFS



- The BFS industry has **seen a decline in its share in the top GBS employers list** from **~45%** to **~20%** in 2024
- The **BFS industry experienced a ~10% drop in the overall employer brand perception**, marking the **steepest decline** across industries
- BFS employers **struggle to improve perceptions of the work environment and career development**, with respective rating **declines of ~12% and ~10%**
- Employers such as **Synchrony Financial, Macquarie Group, ING Group, and American Express** retained their top quadrant positions, while others in BFS struggled to make a significant impact

	Perceived success in the talent market²	Employer brand perception¹	Compensation and benefits	Work environment	Career development	Diversity and inclusion
2024 rating	2.98	2.79	2.79	2.39	2.34	3.71
2023 rating	3.03	3.08	3.03	2.72	2.59	4.03
2022 rating	3.41	3.62	3.75	3.46	3.71	4.13

1 Employer brand perception incorporates the weighted score for employee sentiments across factors such as compensation and benefits, work environment (office ecosystem, work-life balance, hybrid work policies, culture and values, leadership, etc.), career development, and diversity and inclusion

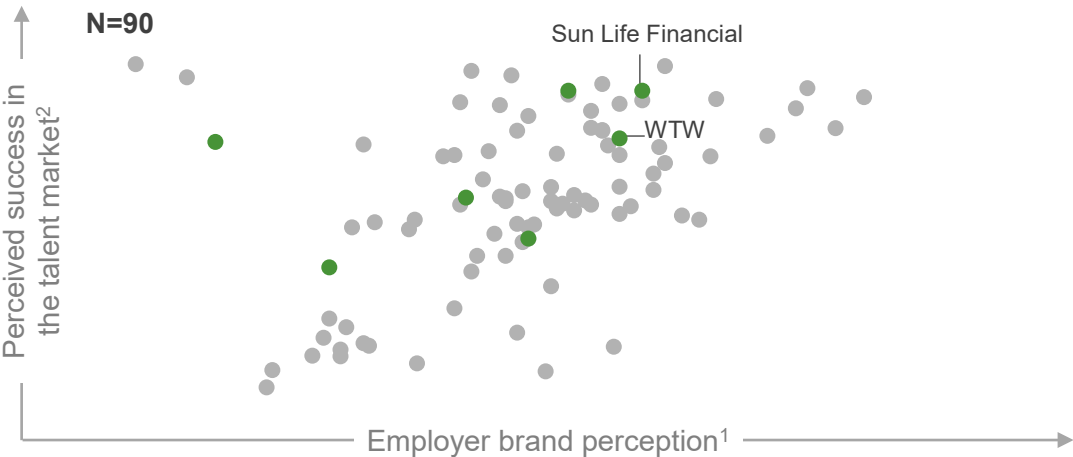
2 Perceived success in the talent market incorporates the weighted score for outcomes such as employee attrition, net gain-loss of talent, and employee satisfaction scores

Note: A few data points of the Top GBS Employers™ 2022 report have been updated post publishing

Source: Various publicly available data sources such as global, regional, and local employee forums, job posting websites, social media, professional media, and Everest Group (2024) analysis

Industry-specific insights – the Philippines (page 2 of 8)

Insurance



- Insurance GBS employers have the **lowest career development ratings in the Philippines**, falling **~13% below the industry average**, highlighting a critical area for improvement
- The insurance industry **experienced significant declines** in compensation and benefits (~8%), career development (~4%), and diversity and inclusion (~9%)
- The insurance industry **improved its share in the top GBS employers list from 7% to 10%** in 2024, with **Sun Life retaining its position and WTW as a new entrant**
- Despite increased representation, the **industry saw a decline** in employer brand perception (~5%) and perceived success in the talent market (~6%)

	Perceived success in the talent market²	Employer brand perception¹	Compensation and benefits	Work environment	Career development	Diversity and inclusion
2024 rating	3.33	2.49	2.29	2.43	1.93	3.50
2023 rating	3.56	2.63	2.50	2.33	2.00	3.83
2022 rating	3.19	3.36	3.20	2.60	2.80	3.70

1 Employer brand perception incorporates the weighted score for employee sentiments across factors such as compensation and benefits, work environment (office ecosystem, work-life balance, hybrid work policies, culture and values, leadership, etc.), career development, and diversity and inclusion

2 Perceived success in the talent market incorporates the weighted score for outcomes such as employee attrition, net gain-loss of talent, and employee satisfaction scores

Note: A few data points of the Top GBS Employers™ 2022 report have been updated post publishing

Source: Various publicly available data sources such as global, regional, and local employee forums, job posting websites, social media, professional media, and Everest Group (2024) analysis

Industry-specific insights – the Philippines (page 3 of 8)

HLS



- The HLS industry has significantly **increased its share of top GBS employers**, from **5% to 15%** in 2024, with **Johnson & Johnson** retaining its top position and new entrants **Merck & Co** and **Bayer**
- HLS emerges as one of the two industries where **employer brand perception has improved** compared to 2023, with an **increase of ~6%**, showcasing proactive efforts to enhance employer attractiveness
- Despite brand perception gains, HLS faces **concerning trends in perceived success in the talent market** declining by ~5% compared to the previous year
- While **scores across all EVP levers have improved**, the HLS industry needs to **prioritize enhancing its work environment and career development**, which are ~8% and ~6% below the industry average, respectively

	Perceived success in the talent market²	Employer brand perception¹	Compensation and benefits	Work environment	Career development	Diversity and inclusion
2024 rating	2.72	2.66	2.79	2.17	2.08	3.63
2023 rating	2.86	2.51	2.61	2.06	1.89	3.50
2022 rating	3.28	3.21	3.75	2.92	3.17	3.58

¹ Employer brand perception incorporates the weighted score for employee sentiments across factors such as compensation and benefits, work environment (office ecosystem, work-life balance, hybrid work policies, culture and values, leadership, etc.), career development, and diversity and inclusion

² Perceived success in the talent market incorporates the weighted score for outcomes such as employee attrition, net gain-loss of talent, and employee satisfaction scores

Note: A few data points of the Top GBS Employers™ 2022 report have been updated post publishing

Source: Various publicly available data sources such as global, regional, and local employee forums, job posting websites, social media, professional media, and Everest Group (2024) analysis

Industry-specific insights – the Philippines (page 4 of 8)

RCPG



- RCPG GBS employers face a **~16% decrease in perceived success in the talent market** compared to the previous year
- RCPG continues to experience declines in work environment (~6%), career development (~12%), and diversity and inclusion (~6%)
- Scores across **all EVP levers have declined compared to 2023**, except for a **slight improvement in compensation and benefits**
- Despite the overall decline, **Henkel, Philip Morris International, and Procter & Gamble maintain their top quadrant positions**, showcasing resilience
- RCPG GBS employers hold a **15% share in the top quadrant in 2024**

	Perceived success in the talent market ²	Employer brand perception ¹	Compensation and benefits	Work environment	Career development	Diversity and inclusion
2024 rating	2.92	2.85	3.41	2.14	2.32	3.45
2023 rating	3.46	3.02	3.36	2.27	2.64	3.68
2022 rating	3.84	3.81	4.31	3.69	4.19	4.44

¹ Employer brand perception incorporates the weighted score for employee sentiments across factors such as compensation and benefits, work environment (office ecosystem, work-life balance, hybrid work policies, culture and values, leadership, etc.), career development, and diversity and inclusion

² Perceived success in the talent market incorporates the weighted score for outcomes such as employee attrition, net gain-loss of talent, and employee satisfaction scores

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Industry-specific insights – the Philippines (page 5 of 8)

Technology and information services



- The technology and information services industry now **holds a 15% share of the top GBS employers**, up from 7% in 2023, with **new entrants such as S&P Global, SAP, and Thomson Reuters**
- The industry saw **modest improvements in compensation and benefits** (~3%) **and career development** (~5%), indicating a positive trend in workplace attractiveness
- Despite these gains, the industry experienced a **~9% decline in diversity and inclusion**, with ratings below the overall average
- The overall employer brand perception score for technology and information services GBS employers **declined marginally by ~2%**

	Perceived success in the talent market ²	Employer brand perception ¹	Compensation and benefits	Work environment	Career development	Diversity and inclusion
2024 rating	3.16	2.79	2.82	2.62	2.27	3.41
2023 rating	3.31	2.85	2.75	2.75	2.17	3.75
2022 rating	3.80	4.11	4.18	2.00	3.90	4.41

¹ Employer brand perception incorporates the weighted score for employee sentiments across factors such as compensation and benefits, work environment (office ecosystem, work-life balance, hybrid work policies, culture and values, leadership, etc.), career development, and diversity and inclusion

² Perceived success in the talent market incorporates the weighted score for outcomes such as employee attrition, net gain-loss of talent, and employee satisfaction scores

Note: A few data points of the Top GBS Employers™ 2022 report have been updated post publishing

Source: Various publicly available data sources such as global, regional, and local employee forums, job posting websites, social media, professional media, and Everest Group (2024) analysis

Industry-specific insights – the Philippines (page 6 of 8)

Telecom



- Telecom GBS employers experienced a **~3% decline in brand perception** and a **~6% drop in perceived talent market success**, indicating challenges in maintaining their competitive edge
- The telecom industry **faces significant challenges in career development and diversity and inclusion**, with scores dropping by **~12%** and **~13%** respectively, highlighting critical areas for improvement
- Despite setbacks in 2023, telecom GBS employers see a **notable 7% increase in compensation in 2024**, reflecting efforts to enhance employee rewards and benefits
- **Telstra** emerges as a **new entrant** in the **top GBS employers list for 2024**

	Perceived success in the talent market²	Employer brand perception¹	Compensation and benefits	Work environment	Career development	Diversity and inclusion
2024 rating	3.15	2.77	2.80	2.50	2.10	3.70
2023 rating	3.36	2.87	2.63	2.50	2.38	4.25
2022 rating	3.20	3.38	4.00	2.50	3.00	3.75

1 Employer brand perception incorporates the weighted score for employee sentiments across factors such as compensation and benefits, work environment (office ecosystem, work-life balance, hybrid work policies, culture and values, leadership, etc.), career development, and diversity and inclusion

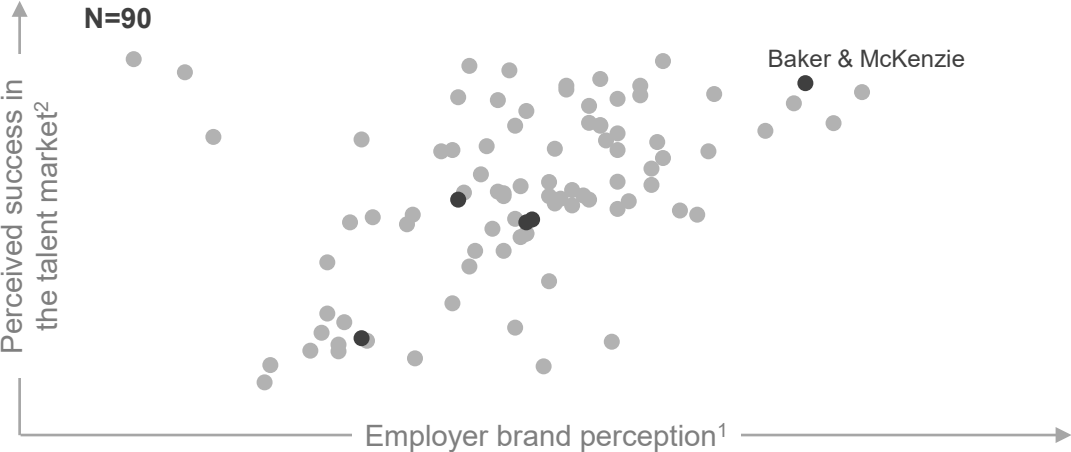
2 Perceived success in the talent market incorporates the weighted score for outcomes such as employee attrition, net gain-loss of talent, and employee satisfaction scores

Note: A few data points of the Top GBS Employers™ 2022 report have been updated post publishing

Source: Various publicly available data sources such as global, regional, and local employee forums, job posting websites, social media, professional media, and Everest Group (2024) analysis

Industry-specific insights – the Philippines (page 7 of 8)

Professional services



- **Career development ratings have declined by ~23% since 2023**, indicating a need for strategic interventions to improve talent attraction and brand perception
- Despite a **~43% increase in compensation and benefits**, many companies still receive low overall employer brand perception ratings in this dimension
- Professional services GBS employers saw a **~7% increase in employer brand perception compared to 2023**
- **Baker & McKenzie is the only professional services firm among the top GBS employers for 2024**

	Perceived success in the talent market ²	Employer brand perception ¹	Compensation and benefits	Work environment	Career development	Diversity and inclusion
2024 rating	2.75	2.75	2.60	2.30	2.70	3.60
2023 rating	2.79	2.58	1.83	2.00	3.50	3.67
2022 rating	2.71	2.73	1.50	2.00	4.75	3.75

1 Employer brand perception incorporates the weighted score for employee sentiments across factors such as compensation and benefits, work environment (office ecosystem, work-life balance, hybrid work policies, culture and values, leadership, etc.), career development, and diversity and inclusion

2 Perceived success in the talent market incorporates the weighted score for outcomes such as employee attrition, net gain-loss of talent, and employee satisfaction scores

Note: A few data points of the Top GBS Employers™ 2022 report have been updated post publishing

Source: Various publicly available data sources such as global, regional, and local employee forums, job posting websites, social media, professional media, and Everest Group (2024) analysis

Industry-specific insights – the Philippines (page 8 of 8)

MLEUO³



- **Career development and work environment are the top concerns** for MLEUO³ GBS employers. Inflexible work options and lack of growth opportunities highlight the need for targeted improvements
- **Compensation and benefits remain stable** but significantly low compared to other industries, **falling below the overall average by ~15%**
- MLEUO³ GBS employers face a **~4% decline in perceived success in the talent market**, suggesting minor challenges in attracting and retaining top talent
- MLEUO³ GBS employers **hold a 15% share of the top GBS employers in 2024** in the Philippines, with **new entrants such as Lexmark International, Chevron, and 3M** in the top quadrant

	Perceived success in the talent market ²	Employer brand perception ¹	Compensation and benefits	Work environment	Career development	Diversity and inclusion
2024 rating	2.94	2.45	2.33	2.30	2.03	3.30
2023 rating	3.06	2.47	2.33	2.23	2.07	3.33
2022 rating	3.21	3.35	3.33	3.33	3.00	3.75

1 Employer brand perception incorporates the weighted score for employee sentiments across factors such as compensation and benefits, work environment (office ecosystem, work-life balance, hybrid work policies, culture and values, leadership, etc.), career development, and diversity and inclusion

2 Perceived success in the talent market incorporates the weighted score for outcomes such as employee attrition, net gain-loss of talent, and employee satisfaction scores

3 MLEUO includes Manufacturing, Logistics and Transportation, Energy and Utility, and Other industry verticals

Note: A few data points of the Top GBS Employers™ 2022 report have been updated post publishing

Source: Various publicly available data sources such as global, regional, and local employee forums, job posting websites, social media, professional media, and Everest Group (2024) analysis

We assessed the following 90 companies' Philippines-based GBS centers (page 1 of 2)

1	3M	15	Carelon Global Solutions	29	Emerson Electric	43	JPMorgan Chase	57	Nokia
2	Abbott Laboratories	16	Chevron	30	Ericsson	44	Lear Corporation	58	Northern Trust
3	Aecom	17	Chubb	31	Ernst & Young	45	Lexmark International	59	Optum
4	Amazon	18	Citco Group	32	Essilor	46	London Stock Exchange	60	PayPal
5	American Express	19	Citigroup	33	Fresenius Medical	47	Lufthansa	61	Philip Morris International
6	Analog Devices	20	Coca-Cola	34	Generali Group	48	Macquarie Group	62	Philips
7	ANZ Bank	21	Continental	35	Global Payments	49	Maersk	63	PricewaterhouseCoopers
8	AstraZeneca	22	Dell Technologies	36	Goodyear Tire & Rubber Company	50	Manulife	64	Procter & Gamble
9	AXA	23	Deloitte	37	Henkel	51	Mercedes-Benz	65	QBE Insurance
10	Baker & McKenzie	24	Deutsche Bank	38	HSBC	52	Merck & Co	66	Qiagen
11	Bayer	25	Dexcom	39	ING Group	53	Mondelez International	67	Reckitt Benckiser
12	Boehringer Ingelheim	26	DHL	40	Japan Tobacco International	54	MSCI	68	Reed Elsevier
13	Canon	27	Diageo	41	Johnson & Johnson	55	Nasdaq	69	Robert Bosch
14	Capital One	28	Eaton Corporation	42	Jones Lang LaSalle	56	Nestlé	70	Royal Dutch Shell

We assessed the following 90 companies' Philippines-based GBS centers (page 2 of 2)

71	S&P Global	85	United Parcel Service
72	Safeway	86	Verizon Communications
73	SAP	87	Wells Fargo & Company
74	Schneider Electric	88	Western Union
75	Siemens	89	Willis Towers Watson
76	Sony	90	Xerox
77	Sun Life Financial		
78	Synchrony Financial		
79	Syngenta		
80	Telstra		
81	Texas Instruments		
82	Thomson Reuters		
83	TotalEnergies		
84	TPG Telecom		

Top GBS Employers™ in in key talent markets

Poland

Everest Group Top GBS Employers™ 2024

Scorecards of top GBS employers

Insights on perceived strengths of different EVP levers

- Compensation and benefits
- Work environment
- Career development
- Diversity and inclusion

Assessment of the top GBS employers over time

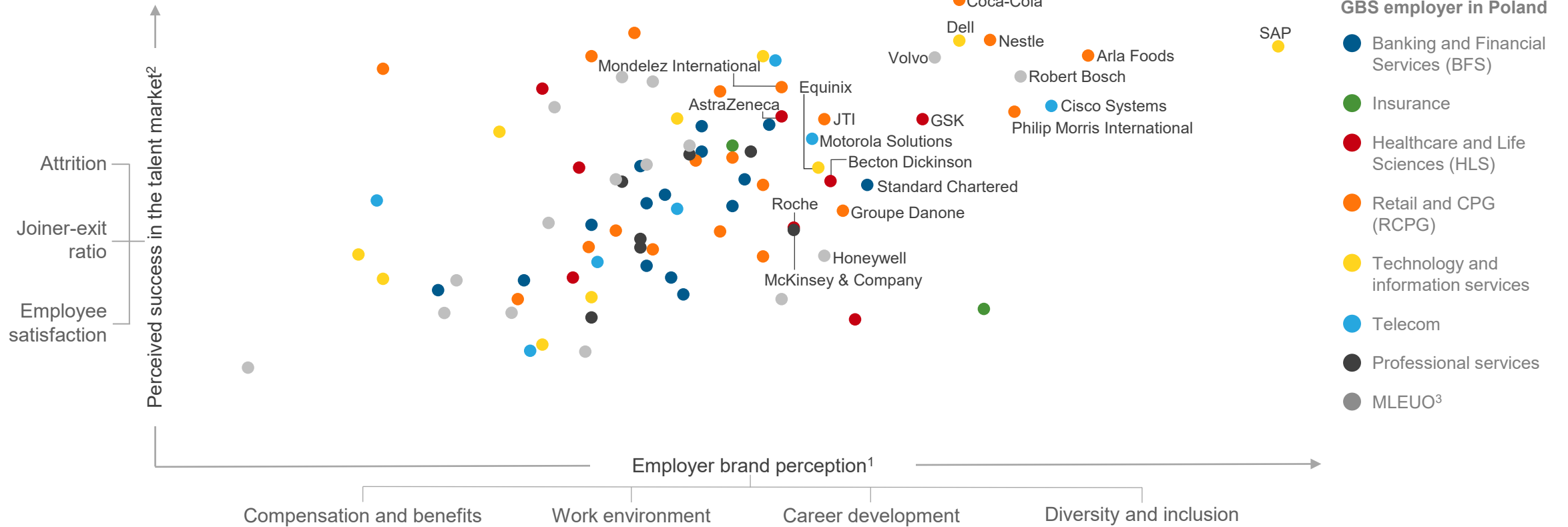
Comparative assessment across industries

Industry-specific insights

List of GBS employers analyzed

Everest Group Top GBS Employers™ 2024 – Poland

Everest Group Top GBS Employers™ 2024 – Poland, N⁴= 85



¹ Employer brand perception incorporates the weighted score for employee sentiments across factors such as compensation and benefits, work environment (office ecosystem, work-life balance, hybrid work policies, culture and values, leadership, etc.), career development, and diversity and inclusion

² Perceived success in the talent market incorporates the weighted score for outcomes such as employee attrition, net gain-loss of talent, and employee satisfaction scores

³ MLEUO includes Manufacturing, Logistics and Transportation, Energy and Utility, and Other industry verticals

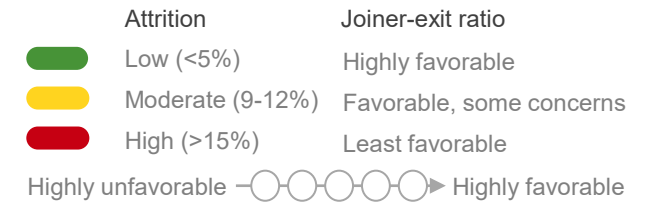
⁴ N = number of companies in the analysis

Note: GBS employers in Poland of the mentioned companies have been identified as the top GBS employers in 2024

Source: This analysis is based on various publicly available data sources such as global, regional, and local employee forums, job posting websites, social media, professional media, and Everest Group (2024) analysis

Everest Group Top GBS Employers™ 2024 – Poland (page 1 of 2)

Top 20 GBS employers



Company ³	EMPLOYER BRAND PERCEPTION ¹				PERCEIVED SUCCESS IN THE TALENT MARKET ²		
	Compensation and benefits	Work environment	Career development	Diversity and inclusion	Attrition	Joiner-exit ratio	Employee satisfaction grade
Arla Foods	\$\$\$ \$		★★★★★		Yellow	Green	A+
AstraZeneca	\$\$\$ \$		★★★★★		Green	Green	A
Becton Dickinson	\$\$\$ \$		★★★★★		Red	Red	A
Cisco Systems	\$\$\$ \$		★★★★★		Yellow	Yellow	A+
Coca-Cola	\$\$\$ \$		★★★★★		Green	Green	A+
Dell	\$\$\$ \$		★★★★★		Green	Green	A+
Equinix	\$\$\$ \$		★★★★★		Yellow	Yellow	B+
GSK	\$\$\$ \$		★★★★★		Green	Green	A
Groupe Danone	\$\$\$ \$		★★★★★		Green	Green	C+
Honeywell International	\$\$\$ \$		★★★★★		Red	Yellow	C+

¹ Represents the aggregate rating of outside-in perception across parameters such as compensation and benefits, work environment (office ecosystem, work-life balance, hybrid work policies, culture and values, leadership, etc.), career development, and diversity and inclusion

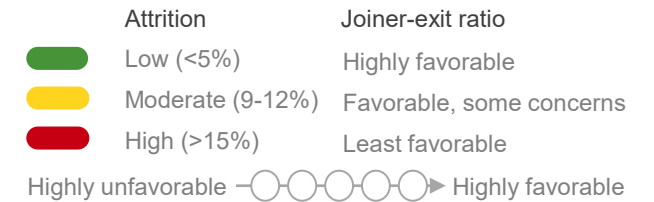
² Represents the aggregate ratings of parameters such as employee attrition, net gain-loss of talent, and employee satisfaction scores

³ GBS employer in the Poland of the mentioned company

Source: Various publicly available data sources such as global, regional, and local employee forums, job posting websites, social media, professional media, and Everest Group (2024) analysis

Everest Group Top GBS Employers™ 2024 – Poland (page 2 of 2)

Top 20 GBS employers



Company ³	EMPLOYER BRAND PERCEPTION ¹				PERCEIVED SUCCESS IN THE TALENT MARKET ²		
	Compensation and benefits	Work environment	Career development	Diversity and inclusion	Attrition	Joiner-exit ratio	Employee satisfaction grade
Japan Tobacco International	\$\$\$ \$ \$		★★★☆☆		<div><div></div></div>	<div><div></div></div>	A
McKinsey & Company	\$\$\$ \$ \$		★★★☆☆		<div><div></div></div>	<div><div></div></div>	B
Mondelez International	\$\$\$ \$ \$		★★★☆☆		<div><div></div></div>	<div><div></div></div>	A+
Motorola Solution	\$\$\$ \$ \$		★★★☆☆		<div><div></div></div>	<div><div></div></div>	A
Nestle	\$\$\$ \$ \$		★★★★★		<div><div></div></div>	<div><div></div></div>	A+
Philip Morris International	\$\$\$ \$ \$		★★★★★		<div><div></div></div>	<div><div></div></div>	A+
Robert Bosch	\$\$\$ \$ \$		★★★☆☆		<div><div></div></div>	<div><div></div></div>	A+
SAP	\$\$\$ \$ \$		★★★★★		<div><div></div></div>	<div><div></div></div>	A+
Standard Chartered Group	\$\$\$ \$ \$		★★★☆☆		<div><div></div></div>	<div><div></div></div>	B
Volvo	\$\$\$ \$ \$		★★★☆☆		<div><div></div></div>	<div><div></div></div>	A+

¹ Represents the aggregate rating of outside-in perception across parameters such as compensation and benefits, work environment (office ecosystem, work-life balance, hybrid work policies, culture and values, leadership, etc.), career development, and diversity and inclusion

² Represents the aggregate ratings of parameters such as employee attrition, net gain-loss of talent, and employee satisfaction scores

³ GBS employer in the Poland of the mentioned company

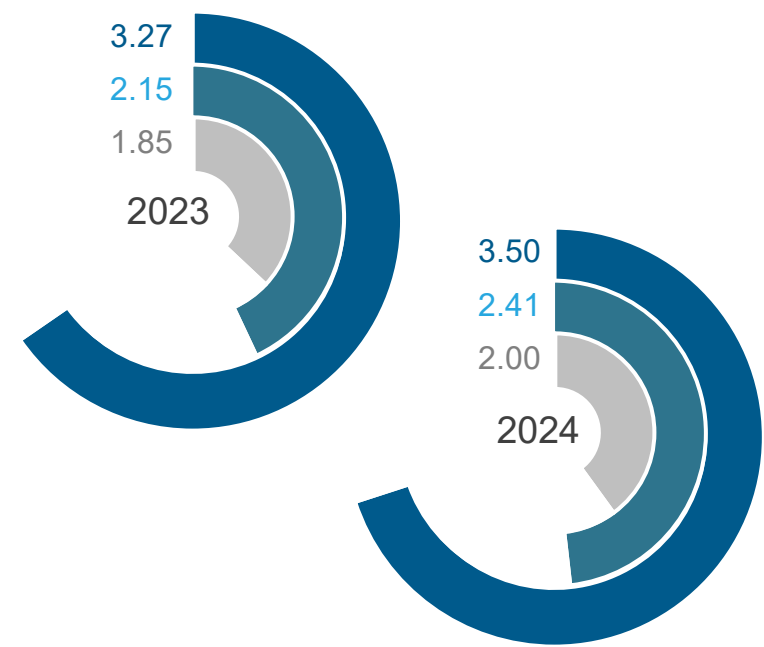
Source: Various publicly available data sources such as global, regional, and local employee forums, job posting websites, social media, professional media, and Everest Group (2024) analysis

Insights on perceived strengths of different EVP levers – Poland (page 1 of 4)

Compensation and benefits

Compensation and benefits

- Top GBS employers
- Overall average
- Rest of the GBS employers



Voice of employees¹

What works

- Offering competitive pay and flexible compensation structures
- Investing heavily in employee benefits, especially comprehensive healthcare and insurance coverage
- Conducting surveys or focus groups to understand employee needs and preferences for compensation and benefits
- Providing cost-of-living adjustments to salaries in areas with a higher cost of living

Challenges/Grievances

- Declining competitiveness of the compensation structure due to rising cost of living
- Offering limited or no rewards, compensation, or financial support for overtime
- Enforcing no market-linked salary corrections and maintaining a ceiling on salary increments
- Struggling to standardize compensation and benefits packages across multiple locations for GBS employers

Observations

- **Compensation perception has seen a slight increase compared to 2023**, attributed to meeting employee expectations and aligning salaries with market trends
- While employees are generally **satisfied with initial compensation offers**, they express **dissatisfaction with marginal increments and market corrections**
- The gap in compensation and benefits between top GBS employers and the rest has **narrowed from ~77% to ~75% in 2024**

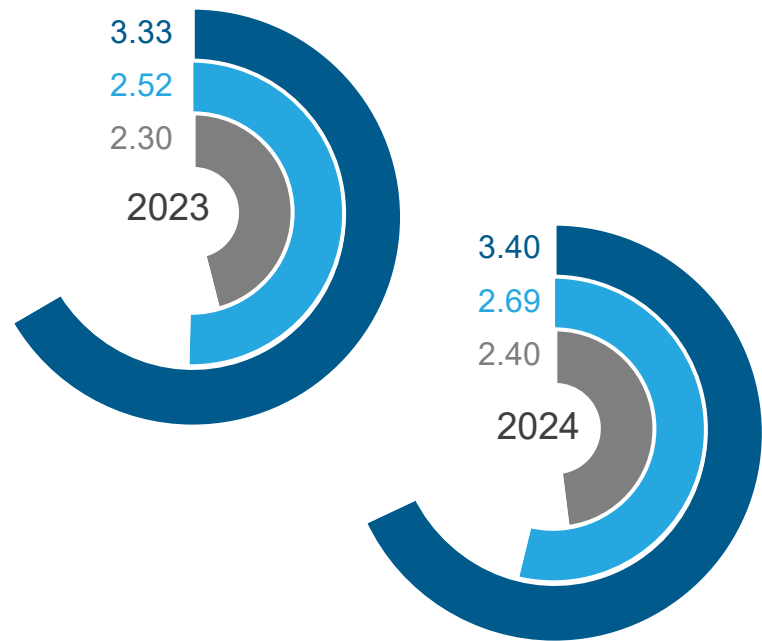
¹ Voice of employees is representative of employee sentiments on employee review portals, social media, and internet
Source: Various publicly available data sources such as global, regional, and local employee forums, job posting websites, social media, professional media, and Everest Group (2024) analysis

Insights on perceived strengths of different EVP levers – Poland (page 2 of 4)

Work environment

Work environment

- Top GBS employers
- Overall average
- Rest of the GBS employers



Voice of employees¹

What works	Challenges/Grievances	Observations
<ul style="list-style-type: none">Maintaining a healthy work-life balance through flexible schedules enhances employee satisfaction and productivityEnsuring long-term job security and creating a pleasant work atmosphere fosters employee loyalty and well-beingProviding fully equipped offices in premium locations with perks such as an onsite gym and breakout rooms enriches the work experienceImplementing programs to recognize and reward employee achievements boosts morale and motivation	<ul style="list-style-type: none">Maintaining inflexibility in hybrid work policies and pressuring employees to return to the office undermines work-life balanceCreating repetitive work environments with a lack of challenging and interesting projects diminishes employee engagementEnforcing extended working hours without extra compensation or acknowledgment for dedication leads to a lack of incentives and appreciation	<ul style="list-style-type: none">GBS employees in Poland face poor work-life balance, stress, and burnout. Promoting well-being and balance is essential to combat these issues and engage the workforceWork environment ratings have improved slightly due to flexible working hours and collaborative office spaces designed by top employersThe rating gap between top GBS employers and others has narrowed slightly to ~42% this year, compared to ~45% in 2023

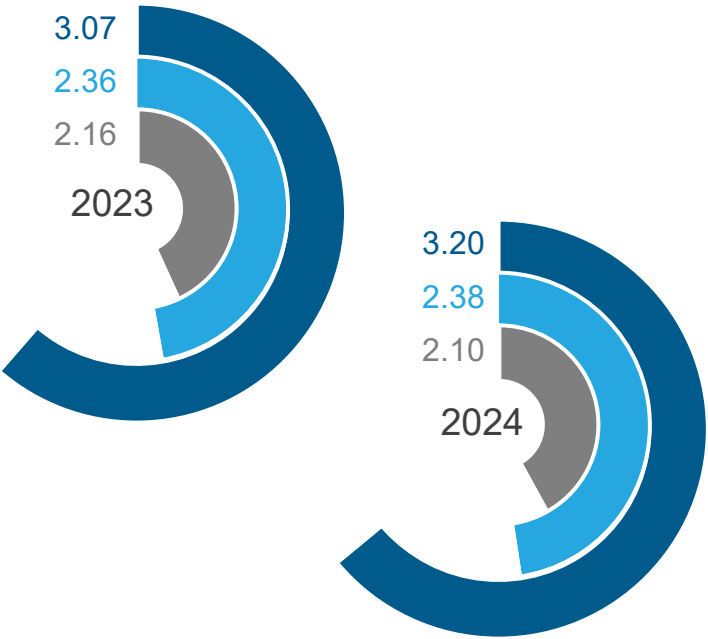
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Source: Various publicly available data sources such as global, regional, and local employee forums, job posting websites, social media, professional media, and Everest Group (2024) analysis

Insights on perceived strengths of different EVP levers – Poland (page 3 of 4)

Career development

Career development

- Top GBS employers
- Overall average
- Rest of the GBS employers



Voice of employees¹

What works

- Creating avenues for accelerated career growth with clearly defined career progression frameworks and focused development programs
- Aligning personal development goals with employee expectations and organizational objectives
- Encouraging employees to rotate through different departments or participate in cross-functional projects to broaden their experience

Challenges/Grievances

- Providing limited growth opportunities for entry and mid-level employees stifles career growth and retention
- Restricting opportunities for cross-domain learning through projects, job rotations, or knowledge-sharing initiatives limits skill development and innovation
- Lacking clear career progression paths within the organization demotivates employees and hinders their commitment to development

Observations

- Top GBS employers have **clear growth paths, customized learning programs, and periodic evaluations** to track progress and promote deserving employees
- Employees working with top GBS employers are **satisfied with exposure to challenging projects**, leading to a slight increase in ratings. However, **concerns about promotion timelines persist**
- The rating gap between top GBS employers and the rest has **widened from ~42% to ~52% in 2024**

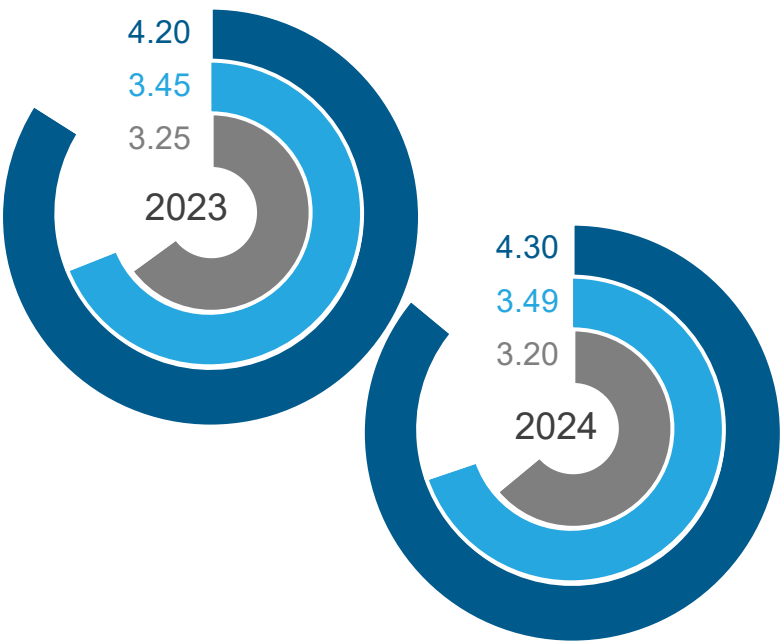
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Source: Various publicly available data sources such as global, regional, and local employee forums, job posting websites, social media, professional media, and Everest Group (2024) analysis

Insights on perceived strengths of different EVP levers – Poland (page 4 of 4)

Diversity and inclusion

Diversity and inclusion

- Top GBS employers
- Overall average
- Rest of the GBS employers



Voice of employees¹

What works	Challenges/Grievances	Observations
<ul style="list-style-type: none">Implementing targeted initiatives for gender diversity and inclusionCreating leadership development programs and initiatives that focus on building the capabilities of women employeesEducating hiring managers and recruiters on unconscious bias to ensure fair and objective candidate evaluations	<ul style="list-style-type: none">Implementing sensitivity training to raise awareness among employeesAddressing subtle forms of discrimination and unconscious bias to prevent a hostile work environment for diverse employeesEnforcing diversity efforts to counteract the concept of swoi in Polish culture, which may lead to biases in hiring and promotion practices	<ul style="list-style-type: none">Top GBS employers in Poland embed diversity into their culture, resulting in increased ratings compared to the previous yearDespite being less emphasized in employee reviews, diversity remains critical for fostering inclusivity in the workplace across all locationsThe gap between ratings for top GBS employers and others has widened from ~29% to ~34% in 2024

¹ Voice of employees is representative of employee sentiments on employee review portals, social media, and internet
Source: Various publicly available data sources such as global, regional, and local employee forums, job posting websites, social media, professional media, and Everest Group (2024) analysis

Assessment of the top GBS employers over time – Poland

The GBS sector in Poland is experiencing a volatile and competitive environment, with significant changes in brand perception across all performance tiers

Performance trends of top 20 percentile GBS employers

2022-23 vs. 2023-24
86% vs. 40% ●

Retained position as top GBS employer

14% vs. 60% ↓

Deterioration in brand perception; no longer a top GBS employer

Performance trends of 20th to 50th percentile GBS employers

2022-23 vs. 2023-24
23% vs. 29% ●

Retained position in similar quadrant

15% vs. 42% ↓

Deterioration in GBS brand perception; dropped to bottom 50% GBS employer

62% vs. 29% ↑

Improvement in GBS brand perception; moved to top GBS employers list

Performance trends of bottom 50% GBS employers

2022-23 vs. 2023-24
71% vs. 61% ●

Limited/No change in GBS brand perception

29% vs. 27% ↑

Improvement in GBS brand perception; moved up by one category

00% vs. 12% ↑

Significant improvement in GBS brand perception; moved to top GBS employers list

↓ Decline ● No change ↑ Improvement

According to our assessment:

- The competitive landscape for the top 20 percentile of GBS employers is **highly dynamic, with a substantial decrease in companies maintaining top positions** and a large increase in brand perception deterioration
- The 20th to 50th percentile of GBS employers show **instability and potential challenges in maintaining or improving brand perception**, evidenced by increased downward mobility and decreased upward mobility
- The bottom 50% of GBS employers remain **mostly static**, but a significant number are making noteworthy improvements, suggesting potential for upward movement within this category

Note: A few data points of the Top GBS Employers™ 2022 report have been updated post publishing

Source: Various publicly available data sources such as global, regional, and local employee forums, job posting websites, social media, professional media, and Everest Group (2024) analysis

Comparative assessment across industries – Poland (page 1 of 3)

Employer brand perception and perceived success in the talent market

Aggregate ratings on factors contributing to EVP

↑ 1-5% increase ↑↑ >5% increase ● -1 to 1% change
 ↓ 1-5% decrease ↓↓ >5% decrease — Average

Category/Industry	Employer brand perception 2024	Change compared to 2023	Perceived success in the talent market 2024	Change compared to 2023	Comments
Top GBS employers	3.54	↑	3.63	↑↑	<ul style="list-style-type: none"> GBS employer brand perception in Poland has improved by ~7% compared to 2023, with declines only in the HLS and telecom sectors Perception of success in the talent market has notably improved by ~5%, except for the insurance sector, which saw a decline The disparity in perception ratings between top GBS employers and the average across the Poland GBS market is most pronounced compared to other regions While some GBS employers face employer brand perception challenges, they are still regarded favorably for their ability to attract and retain skilled professionals
BFS	2.51	↑↑	2.63	↑↑	
Insurance	3.29	↑↑	2.46	↓↓	
HLS	2.78	↓↓	2.89	↑↑	
RCPG	2.82	●	3.34	↑↑	
Technology and information services	2.59	↑↑	3.03	↑↑	
Telecom	2.60	↓	2.86	↑↑	
Professional services	2.54	↑↑	2.57	↑↑	
MLEUO ¹	2.37	↑↑	2.69	↑↑	
	2.69		2.81		

¹ MLEUO includes Manufacturing, Logistics and Transportation, Energy and Utility, and Other industry verticals

Source: Various publicly available data sources such as global, regional, and local employee forums, job posting websites, social media, professional media, and Everest Group (2024) analysis

Comparative assessment across industries – Poland (page 2 of 3)

Compensation and benefits and work environment

Aggregate ratings on factors contributing to employer brand perception

Category/Industry	Compensation and benefits 2024	Change compared to 2023	Work environment 2024	Change compared to 2023	Comments
Top GBS employers	3.50	↑↑	3.40	↑	<ul style="list-style-type: none"> • Perception of compensation and benefits improved by ~15%, yet the average remains stagnant, with only RCPG, insurance, and HLS scoring above the industry average • The HLS sector shows significant volatility, with sharp declines in compensation and benefits and work environment ratings among GBS employers • The technology and information services industry experienced a decline in work environment scores due to mandatory return-to-office policies and the reversal of WFH arrangements • The higher variance in average perception ratings across industries indicates a lower correlation across different sectors
BFS	1.97	↑↑	2.50	↑↑	
Insurance	3.50	↑↑	3.25	↑↑	
HLS	2.69	↓↓	2.88	↓	
RCPG	2.68	↑	2.60	↓	
Technology and information services	2.10	↑↑	2.70	↓	
Telecom	2.07	↑	3.14	↓	
Professional services	2.14	↓	2.14	↑↑	
MLEUO ¹	2.16	↑↑	2.34	●	
	2.41		2.69		

¹ MLEUO includes Manufacturing, Logistics and Transportation, Energy and Utility, and Other industry verticals

Source: Various publicly available data sources such as global, regional, and local employee forums, job posting websites, social media, professional media, and Everest Group (2024) analysis

Comparative assessment across industries – Poland (page 3 of 3)

Career development and diversity and inclusion

Aggregate ratings on factors contributing to employer brand perception

1-5% increase
 >5% increase
 -1 to 1% change
 1-5% decrease
 >5% decrease
 Average

Category/Industry	Career development 2024	Change compared to 2023	Diversity and inclusion 2024	Change compared to 2023	Comments
Top GBS employers	3.20		4.30		<ul style="list-style-type: none"> Technology GBS employers have improved career development opportunities by ~50% since 2023
BFS	2.53		3.47		
Insurance	2.25		4.00		<ul style="list-style-type: none"> HLS, RCPG, telecom, and MLEUO3 industries have seen declines in career development ratings, with HLS showing the steepest decline of ~15%
HLS	2.25		3.38		
RCPG	2.50		3.78		<ul style="list-style-type: none"> Average diversity and inclusion perception has increased by ~4%, though some industries such as HLS, RCPG, and telecom have seen declines
Technology and information services	2.25		3.65		
Telecom	2.36		3.07		
Professional services	3.00		3.29		<ul style="list-style-type: none"> Industries with lower diversity and inclusion ratings must prioritize diversity efforts, as the Poland GBS market increasingly values diversity
MLEUO ¹	1.88		3.28		
	2.38		3.49		

¹ MLEUO includes Manufacturing, Logistics and Transportation, Energy and Utility, and Other industry verticals

Source: Various publicly available data sources such as global, regional, and local employee forums, job posting websites, social media, professional media, and Everest Group (2024) analysis

Industry-specific insights – Poland (page 1 of 8)

BFS



- Only **Standard Chartered** features in the top GBS employers list 2024, while the rest of the BFS industry is dispersed across the middle and lower quadrants
- The BFS industry has seen an **overall increase in employer brand perception**, with an improvement of **~8%** compared to the previous year
- This industry in Poland scores **the lowest in the compensation and benefits** dimension among all industries, **trailing ~18% below the average score for GBS employers**
- Enhancing **compensation increments** to meet employee expectations and implementing **timely market corrections** emerge as predominant issues for BFS GBS employers in Poland

	Perceived success in the talent market²	Employer brand perception¹	Compensation and benefits	Work environment	Career development	Diversity and inclusion
2024 rating	2.63	2.51	1.97	2.50	2.53	3.47
2023 rating	2.37	2.33	1.81	2.34	2.28	3.25
2022 rating	2.59	2.89	2.30	2.80	2.75	3.90

1 Employer brand perception incorporates the weighted score for employee sentiments across factors such as compensation and benefits, work environment (office ecosystem, work-life balance, hybrid work policies, culture and values, leadership, etc.), career development, and diversity and inclusion

2 Perceived success in the talent market incorporates the weighted score for outcomes such as employee attrition, net gain-loss of talent, and employee satisfaction scores

Note: A few data points of the Top GBS Employers™ 2022 report have been updated post publishing

Source: Various publicly available data sources such as global, regional, and local employee forums, job posting websites, social media, professional media, and Everest Group (2024) analysis

Industry-specific insights – Poland (page 2 of 8)

Insurance



- Notably, **no insurance GBS employer** made it to the top GBS employer list in 2024, similar to last year
- The insurance industry has **experienced a substantial increase in employer brand perception**, showing an overall **34%** rise, with EVP levers collectively up by an average of **~32%** compared to 2023
- Despite the significant improvement in brand perception, the industry has seen a **decline in perceived success in the talent market** by **~40%**, suggesting that increased brand perception has not fully translated into enhanced talent attraction

	Perceived success in the talent market ²	Employer brand perception ¹	Compensation and benefits	Work environment	Career development	Diversity and inclusion
2024 rating	2.46	3.29	3.50	3.25	2.25	4.00
2023 rating	4.00	2.45	2.00	3.00	2.00	3.00
2022 rating	3.73	2.35	1.00	4.00	2.00	3.00

1 Employer brand perception incorporates the weighted score for employee sentiments across factors such as compensation and benefits, work environment (office ecosystem, work-life balance, hybrid work policies, culture and values, leadership, etc.), career development, and diversity and inclusion

2 Perceived success in the talent market incorporates the weighted score for outcomes such as employee attrition, net gain-loss of talent, and employee satisfaction scores

Note: A few data points of the Top GBS Employers™ 2022 report have been updated post publishing

Source: Various publicly available data sources such as global, regional, and local employee forums, job posting websites, social media, professional media, and Everest Group (2024) analysis

Industry-specific insights – Poland (page 3 of 8)

HLS



- The HLS industry holds a notable **15% share in the top quadrant** of GBS employers in Poland, with **GSK** and **AstraZeneca** successfully retaining their positions as top employers
- Despite strong placements, the **overall employer brand perception** of the HLS industry has seen a **decrease**, with all **dimensions falling by an average of ~9%**, and overall perception declining by **~9%** compared to 2023
- While the HLS industry maintains **above-average ratings across most EVP levers**, there is a clear need to address the worrying trend of declining perception amid stiff intra-industry competition

	Perceived success in the talent market²	Employer brand perception¹	Compensation and benefits	Work environment	Career development	Diversity and inclusion
2024 rating	2.89	2.78	2.69	2.88	2.25	3.38
2023 rating	2.71	3.04	2.92	3.00	2.67	3.67
2022 rating	3.10	3.56	3.90	3.90	3.70	3.80

1 Employer brand perception incorporates the weighted score for employee sentiments across factors such as compensation and benefits, work environment (office ecosystem, work-life balance, hybrid work policies, culture and values, leadership, etc.), career development, and diversity and inclusion

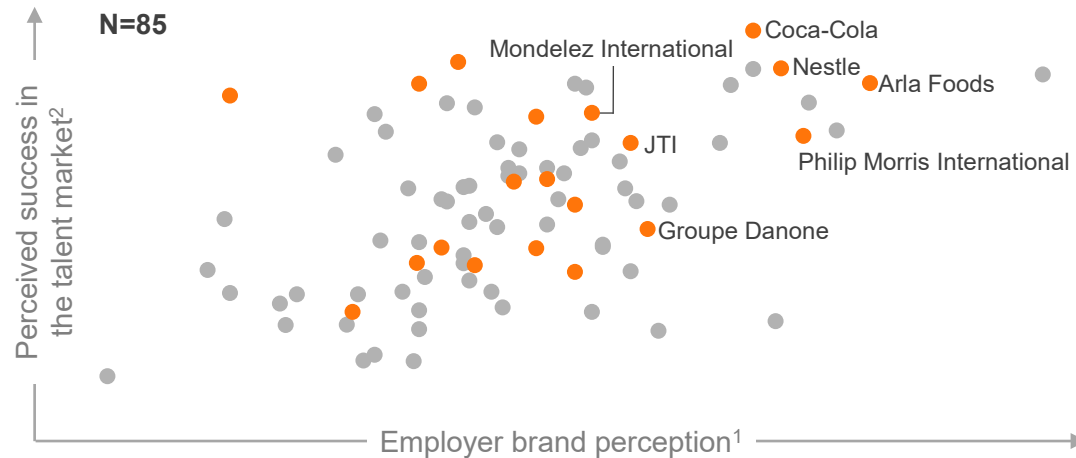
2 Perceived success in the talent market incorporates the weighted score for outcomes such as employee attrition, net gain-loss of talent, and employee satisfaction scores

Note: A few data points of the Top GBS Employers™ 2022 report have been updated post publishing

Source: Various publicly available data sources such as global, regional, and local employee forums, job posting websites, social media, professional media, and Everest Group (2024) analysis

Industry-specific insights – Poland (page 4 of 8)

RCPG



- The RCPG industry captures a dominant **35% share of the top quadrant** among GBS employers in Poland
- Players such as **Mondelēz International** and **Philip Morris International** continue to secure their spots as top GBS employers, alongside **several newcomers**, highlighting stability and dynamic growth within the industry
- The RCPG industry boasts the **highest perceived success in the talent market rating** among all GBS industries in Poland, indicating strong appeal and effectiveness in attracting top talent
- The **EVP dimensions have seen a slight decline YoY, except for the compensation and benefits dimension**, which has seen a **5% increase**, suggesting targeted improvements in employee offerings

	Perceived success in the talent market ²	Employer brand perception ¹	Compensation and benefits	Work environment	Career development	Diversity and inclusion
2024 rating	3.34	2.82	2.68	2.60	2.50	3.78
2023 rating	2.83	2.82	2.55	2.66	2.68	3.87
2022 rating	2.90	2.91	2.38	2.96	3.00	3.58

¹ Employer brand perception incorporates the weighted score for employee sentiments across factors such as compensation and benefits, work environment (office ecosystem, work-life balance, hybrid work policies, culture and values, leadership, etc.), career development, and diversity and inclusion

² Perceived success in the talent market incorporates the weighted score for outcomes such as employee attrition, net gain-loss of talent, and employee satisfaction scores

Note: A few data points of the Top GBS Employers™ 2022 report have been updated post publishing

Source: Various publicly available data sources such as global, regional, and local employee forums, job posting websites, social media, professional media, and Everest Group (2024) analysis

Industry-specific insights – Poland (page 5 of 8)

Technology and information services



- Technology and information services constitute **15% of the top GBS employers in 2024**
- Companies such as **SAP, Dell Technologies, and Equinix** have been recognized as top employers in Poland in this industry this year
- This industry has recorded a robust **~27% increase in perceived success in the talent market** rating compared to 2023, indicating heightened attractiveness to prospective employees
- Following previous concerns on **compensation and benefits** and **career development**, there has been a notable **~40% and ~50% improvement** respectively in this dimension, highlighting successful efforts to enhance compensation packages and demonstrating commitment to employee growth

	Perceived success in the talent market ²	Employer brand perception ¹	Compensation and benefits	Work environment	Career development	Diversity and inclusion
2024 rating	3.03	2.59	2.10	2.70	2.25	3.65
2023 rating	2.39	2.16	1.50	2.75	1.50	3.25
2022 rating	2.75	2.38	3.00	2.50	1.00	2.50

¹ Employer brand perception incorporates the weighted score for employee sentiments across factors such as compensation and benefits, work environment (office ecosystem, work-life balance, hybrid work policies, culture and values, leadership, etc.), career development, and diversity and inclusion

² Perceived success in the talent market incorporates the weighted score for outcomes such as employee attrition, net gain-loss of talent, and employee satisfaction scores

Note: A few data points of the Top GBS Employers™ 2022 report have been updated post publishing

Source: Various publicly available data sources such as global, regional, and local employee forums, job posting websites, social media, professional media, and Everest Group (2024) analysis

Industry-specific insights – Poland (page 6 of 8)

Telecom



- **Cisco Systems** remains the top GBS employer for the **third consecutive year**, with **Motorola Solutions** also maintaining its top position from the previous year
- Despite overall strong employer brand perception, the telecom industry **experienced a downturn in most brand perception dimensions** this year, with the exception of compensation and benefits
- There was a notable **~14% decline in the diversity and inclusion dimension**, positioning the telecom industry as having the lowest score in this area across all GBS industries, highlighting a critical area for attention and improvement

	Perceived success in the talent market²	Employer brand perception¹	Compensation and benefits	Work environment	Career development	Diversity and inclusion
2024 rating	2.86	2.60	2.07	3.14	2.36	3.07
2023 rating	2.61	2.73	2.00	3.25	2.50	3.58
2022 rating	2.40	3.31	2.50	3.38	2.75	3.75

1 Employer brand perception incorporates the weighted score for employee sentiments across factors such as compensation and benefits, work environment (office ecosystem, work-life balance, hybrid work policies, culture and values, leadership, etc.), career development, and diversity and inclusion

2 Perceived success in the talent market incorporates the weighted score for outcomes such as employee attrition, net gain-loss of talent, and employee satisfaction scores

Note: A few data points of the Top GBS Employers™ 2022 report have been updated post publishing

Source: Various publicly available data sources such as global, regional, and local employee forums, job posting websites, social media, professional media, and Everest Group (2024) analysis

Industry-specific insights – Poland (page 7 of 8)

Professional services



- **McKinsey & Company** stands alone as the sole professional services firm on the top GBS employers list, highlighting its distinct position in the industry
- The professional services industry in Poland **excels in career development**, scoring **26% higher than the industry average**, showcasing a strong commitment to fostering professional growth
- Employees highly value **the competitive salaries, benefits, and learning opportunities** provided, yet express concerns over slow career progression and challenging work-life balance, which could impact overall satisfaction and retention

	Perceived success in the talent market²	Employer brand perception¹	Compensation and benefits	Work environment	Career development	Diversity and inclusion
2024 rating	2.57	2.54	2.14	2.14	3.00	3.29
2023 rating	2.11	2.33	2.20	1.90	2.70	2.90
2022 rating	2.63	2.53	2.13	2.13	3.13	3.13

¹ Employer brand perception incorporates the weighted score for employee sentiments across factors such as compensation and benefits, work environment (office ecosystem, work-life balance, hybrid work policies, culture and values, leadership, etc.), career development, and diversity and inclusion

² Perceived success in the talent market incorporates the weighted score for outcomes such as employee attrition, net gain-loss of talent, and employee satisfaction scores

Note: A few data points of the Top GBS Employers™ 2022 report have been updated post publishing

Source: Various publicly available data sources such as global, regional, and local employee forums, job posting websites, social media, professional media, and Everest Group (2024) analysis

Industry-specific insights – Poland (page 8 of 8)

MLEUO³



- The MLEUO³ industry now holds a **15% share of the top GBS employers list** in 2024, marking a notable **improvement from the previous year** when it had no representation among top employers
- The industry has seen considerable **improvements in employer brand perception**, particularly among automotive and industrial products employers
- Despite gains in other areas, the industry scores the **lowest in the career development dimension** among GBS employers, trailing the average across industries by **~21%**, indicating a critical area for improvement
- **MLEUO³ needs to bolster all EVP levers**, as its scores in perceived success in the talent market and employer brand perception are below the industry average by **4%** and **12%**, respectively

	Perceived success in the talent market ²	Employer brand perception ¹	Compensation and benefits	Work environment	Career development	Diversity and inclusion
2024 rating	2.69	2.37	2.16	2.34	1.88	3.28
2023 rating	2.47	2.20	1.80	2.33	1.97	3.27
2022 rating	2.30	2.19	1.79	2.43	1.71	2.93

1 Employer brand perception incorporates the weighted score for employee sentiments across factors such as compensation and benefits, work environment (office ecosystem, work-life balance, hybrid work policies, culture and values, leadership, etc.), career development, and diversity and inclusion

2 Perceived success in the talent market incorporates the weighted score for outcomes such as employee attrition, net gain-loss of talent, and employee satisfaction scores

3 MLEUO includes Manufacturing, Logistics and Transportation, Energy and Utility, and Other industry verticals

Note: A few data points of the Top GBS Employers™ 2022 report have been updated post publishing

Source: Various publicly available data sources such as global, regional, and local employee forums, job posting websites, social media, professional media, and Everest Group (2024) analysis

We assessed the following 85 companies' Poland-based GBS centers

1	3M	15	Becton Dickinson and Company	29	Ernst & Young	43	ING Group	57	Nokia	71	Schneider Electric	85	XPO Logistics
2	ABB Group	16	BNP Paribas	30	Euroclear	44	Japan Tobacco International	58	Nordea Bank	72	Siemens		
3	AkzoNobel	17	Brown Brothers Harriman	31	Franklin Templeton Investments	45	Jones Lang LaSalle	59	Orange	73	Standard Chartered Group		
4	ALDI	18	CBRE Group	32	General Electric	46	JPMorgan Chase	60	PepsiCo	74	State Street Corporation		
5	Amazon	19	Cisco Systems	33	Goldman Sachs	47	KPMG	61	Philip Morris International	75	Takeda		
6	Amway	20	Citigroup	34	Groupe Danone	48	L'Oreal	62	Philips	76	Tesco		
7	AON	21	Coca-Cola	35	Groupon	49	Mars	63	PricewaterhouseCoopers	77	Thomson Reuters		
8	Aptiv	22	Colgate-Palmolive	36	GSK	50	McKinsey & Company	64	Procter & Gamble	78	T-Mobile Sprint Corporation		
9	Arla Foods	23	Dell Technologies	37	Heineken International	51	Medicover	65	Robert Bosch	79	UBS		
10	AstraZeneca	24	Deloitte	38	Honeywell International	52	Mondelez International	66	Roche	80	Unilever		
11	Avon	25	Demant	39	HP	53	Motorola Solutions	67	Rockwell Automation	81	United Parcel Service		
12	AXA XL	26	DHL	40	HSBC	54	NatWest	68	Royal Dutch Shell	82	Volkswagen		
13	Bank of New York Mellon	27	Equinix	41	Huawei	55	Nestlé	69	Santander Bank	83	Volvo Group		
14	Bayer	28	Ericsson	42	IKEA	56	Nielsen	70	SAP	84	Whirlpool Corporation		

What works or needs attention in different geographies

Geographical comparison of employer brand perception over time

How EVP levers compare across India, the Philippines, and Poland

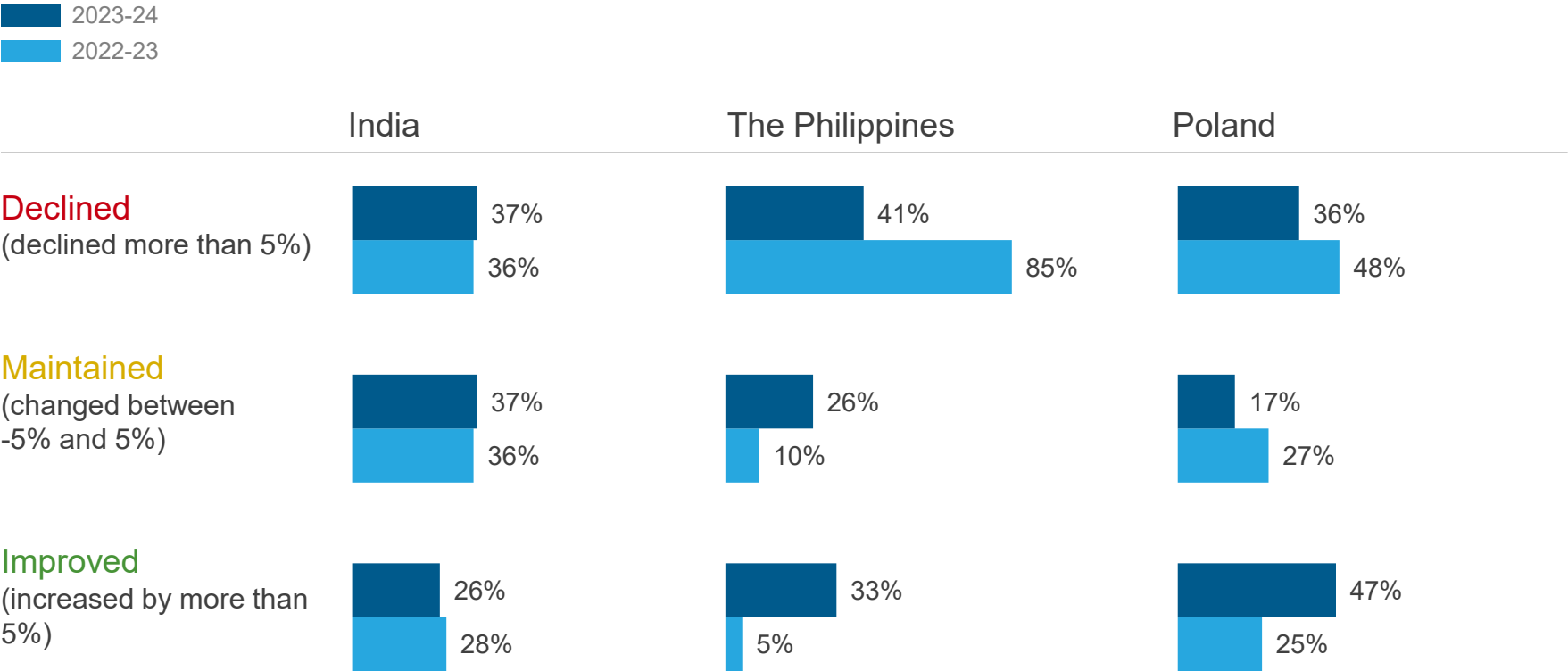
How age, size, and HQ of parent company affect GBS employer attractiveness

- India
- The Philippines
- Poland

Geographical comparison of employer brand perception over time

Companies’ employer brand perception has improved substantially in the Philippines and Poland, while it has remained steady in India

Employer brand perception comparison



According to our assessment:

- **India’s employer brand perception remained relatively stable**, with minor changes in all categories
- **The Philippines saw a major shift toward more stable or improved perceptions**, indicating a significant recovery or improvement in employer brand perception
- **Poland experienced a notable positive shift**, with a large increase in improved perceptions and a significant decrease in declined perceptions

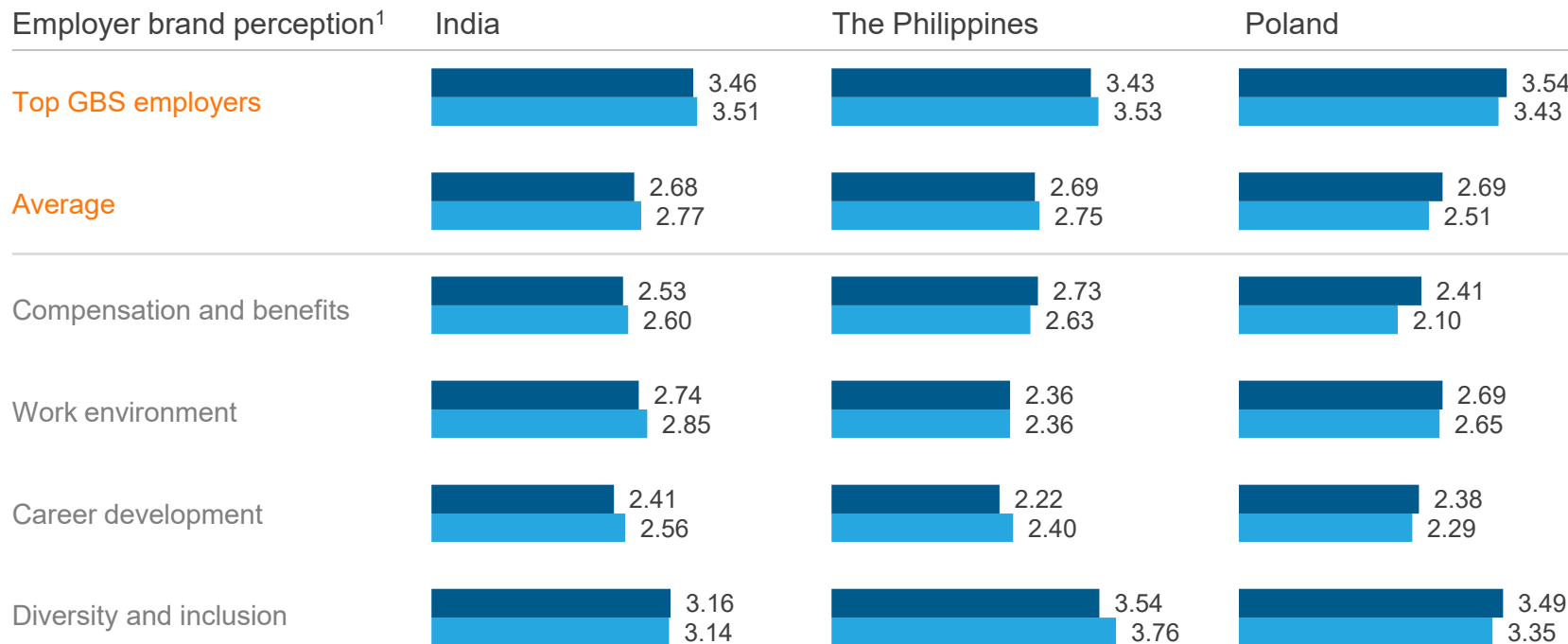
Note: A few data points of the Top GBS Employers™ 2022 report have been updated post publishing
Source: Various publicly available data sources such as global, regional, and local employee forums, job posting websites, social media, professional media, and Everest Group (2024) analysis

How EVP levers compare across India, the Philippines, and Poland

The average employer brand perception dropped by ~3% in India and the Philippines, but improved by ~7% in Poland

Employer brand perception comparison

■ 2023-24
■ 2022-23



According to our assessment:

- Poland is the only country showing an **improvement in employer brand perception** among top GBS employers and overall average, while India and the Philippines show a slight decline
- Perception of career development opportunities improved in Poland**, while both India and the Philippines experienced a decline, with **the Philippines showing the largest drop**
- Compensation and benefits perception **improved in the Philippines and Poland**, whereas it declined in India
- Diversity and inclusion perceptions **improved in India and Poland**, with Poland showing a notable increase, while **the Philippines experienced a decline**

¹ Employer brand perception incorporates the weighted score for employee sentiments across factors such as compensation and benefits, work environment (office ecosystem, work-life balance, hybrid work policies, culture and values, leadership, etc.), career development, and diversity and inclusion

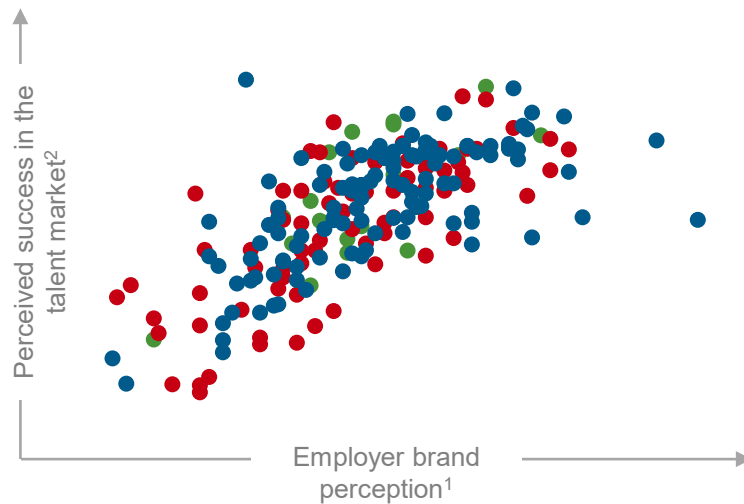
Source: Various publicly available data sources such as global, regional, and local employee forums, job posting websites, social media, professional media, and Everest Group (2024) analysis

How age, size, and HQ of parent company affect GBS employer attractiveness – India

Correlation between EVP and age

Age of GBS employer

● 0-5 years ● 6-15 years ● 15+ years

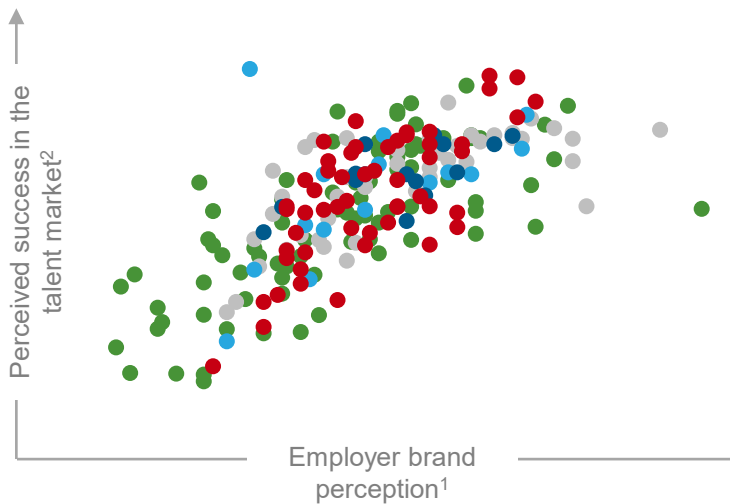


There is limited correlation between the age of a GBS employer and EVP

Correlation between EVP and size (FTEs)

FTE count of the GBS employer

● 0-1,000 ● 1,001-2,000 ● 2,001-5,000
● 5,001-10,000 ● 10,000+

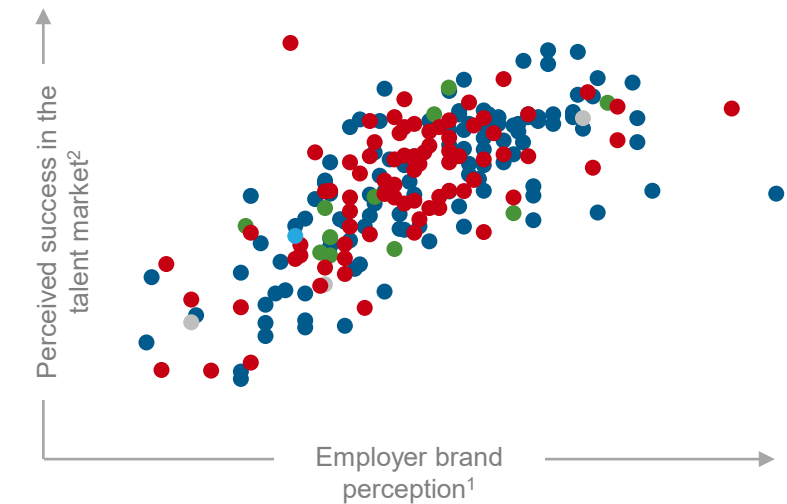


There is limited correlation between the size of a GBS employer and EVP

Correlation between EVP and HQ of parent company

HQ of parent company of the GBS employer

● Asia Pacific ● Europe ● Latin America ● Middle East and Africa
● North America



Employers headquartered in North America seem to have an edge, occupying the upper right corner of the chart

¹ Employer brand perception incorporates the weighted score for employee sentiments across factors such as compensation and benefits, work environment (office ecosystem, work-life balance, hybrid work policies, culture and values, leadership, etc.), career development, and diversity and inclusion

² Perceived success in the talent market incorporates the weighted score for outcomes such as employee attrition, net gain-loss of talent, and employee satisfaction scores

How age, size, and HQ of parent company affect GBS employer attractiveness – the Philippines

Correlation between EVP and age

Age of GBS employer

● 0-5 years ● 6-15 years ● 15+ years

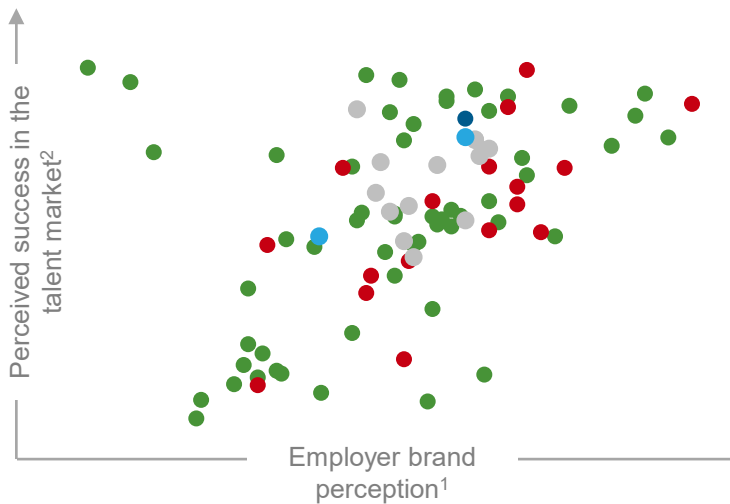


There is limited correlation between the age of a GBS employer and EVP

Correlation between EVP and size (FTEs)

FTE count of the GBS employer

● 0-1,000 ● 1,001-2,000 ● 2,001-5,000
● 5,001-10,000 ● 10,000+



There is limited correlation between the size of a GBS employer and EVP

Correlation between EVP and HQ of parent company

HQ of parent company of the GBS employer

● Asia Pacific ● Europe ● Latin America ● Middle East and Africa
● North America



Employers headquartered in North America seem to have a bit of an edge, occupying the upper right corner of the chart

1 Employer brand perception incorporates the weighted score for employee sentiments across factors such as compensation and benefits, work environment (office ecosystem, work-life balance, hybrid work policies, culture and values, leadership, etc.), career development, and diversity and inclusion

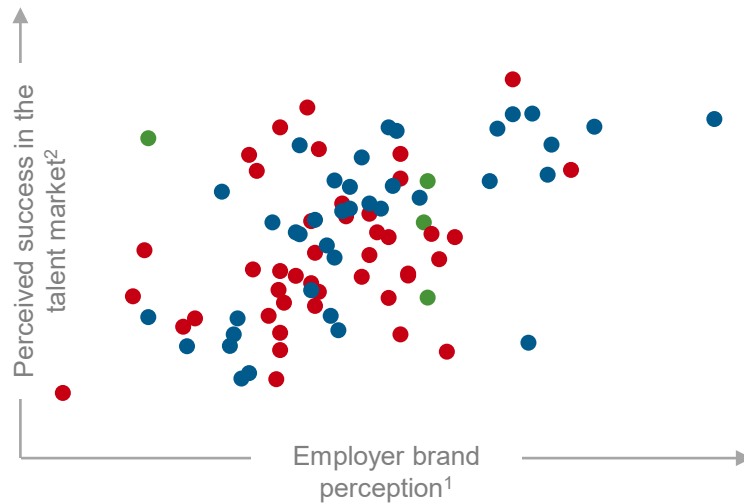
2 Perceived success in the talent market incorporates the weighted score for outcomes such as employee attrition, net gain-loss of talent, and employee satisfaction scores

How age, size, and HQ of parent company affect GBS employer attractiveness – Poland

Correlation between EVP and age

Age of GBS employer

● 0-5 years ● 6-15 years ● 15+ years



There is limited correlation between the age of a GBS employer and EVP

Correlation between EVP and size (FTEs)

FTE count of the GBS employer

● 0-1,000 ● 1,001-2,000 ● 2,001-5,000
● 5,001-10,000 ● 10,000+



There is limited correlation between the size of a GBS employer and EVP

Correlation between EVP and HQ of parent company

HQ of parent company of the GBS employer

● Asia Pacific ● Europe ● Latin America ● Middle East and Africa
● North America



Employers headquartered in Europe seem to have an edge, occupying the upper right corner of the chart

1 Employer brand perception incorporates the weighted score for employee sentiments across factors such as compensation and benefits, work environment (office ecosystem, work-life balance, hybrid work policies, culture and values, leadership, etc.), career development, and diversity and inclusion

2 Perceived success in the talent market incorporates the weighted score for outcomes such as employee attrition, net gain-loss of talent, and employee satisfaction scores

Appendix

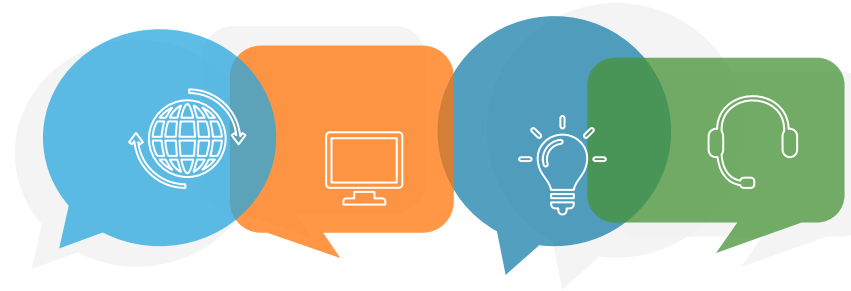
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Frequently Asked Questions (FAQs)



What is the research approach for this analysis?

Everest Group Top Employers ratings are based on aggregation and analysis of feedback and ratings from:

- Established public sources such as Glassdoor, LinkedIn, and Indeed
- Some local public sources such as AmbitionBox for India
- Company social media pages such as X (formerly known as Twitter), Facebook, and Instagram

No data was collected from the organizations

How did Everest Group identify the firms included in this analysis?

We started with a list of the 400+ largest global GBS employers with offshore presence in each industry based on scale, popularity, market share, etc. We deprioritized companies based on lack of data/information on their operations –

bringing the list to about 380+, of which 210 companies were based in India, 90 in the Philippines, and 85 in Poland. We then further assessed these companies on our five core dimensions: compensation and benefits, work environment, career opportunities, employee satisfaction, and diversity and inclusion.

What is the timing for this study?

We collected all of the information at the end of Q1 2024 and analyzed it in early Q2 2024.

What do the top GBS employers receive?

The identified top GBS employers receive a digital badge identifying them as Everest Group's Top GBS Employers™ <Geography> – 2024. They can use the badge on social media, email signatures, and job boards free of charge.

Glossary of key terms used in this report

Attrition	Rate at which employees leave an organization by the average number of employees at the organization over trailing 12 months
BFS	Banking and Financial Services
Employer brand perception	Employer brand perception incorporates the weighted score for employee sentiments across factors such as compensation and benefits, work environment (office ecosystem, work-life balance, hybrid work policies, culture and values, and leadership), career development, and diversity and inclusion
EVP	Employee Value Proposition refers to the perceived value that employees benefit from by associating with an employer
FTEs	Full-time Employees on the rolls of the company
GBS	Global Business Services are service delivery operations in low-cost geographies, which are owned and operated by the same company receiving the services (i.e., not third-party outsourcing)
HLS	Healthcare and Life Sciences
Joiner-exit ratio	Ratio of total number of hires by the total number of departures in the last 12 months
MLEUO	Manufacturing, Logistics and transport, Energy, Utility, and Other industry verticals
Perceived success in the talent market	Perceived success in the talent market incorporates the weighted score for outcomes such as employee attrition, net gain-loss of talent, and employee satisfaction scores
RCPG	Retail and Consumer Product Goods
WFH	Work From Home

Related content

- [How GBS Organizations Build Differentiated Employer Brand Perception | Top GBS Employers Case Study Compendium Report](#)
- [Everest Group Top GBS Employers™ in India, the Philippines, and Poland 2023 | Report](#)
- [Everest Group Top Employers for Tech Talent™ in India, the US, and the UK 2023 | Report](#)
- [The 2023 Top Employers For Tech Talent: Insights to Create a Powerful Employer Value Proposition | Webinar](#)
- [Winning Employer Value Propositions: Strategies from Top GBS Employers | Webinar](#)
- [Improve Your GBS Employer Brand | Learning from the Best in Poland | LinkedIn Live](#)

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Research calendar

GBS Talent Excellence

	Published	Current release	Planned
Reports title	Release date		
Practitioner Perspectives – Top Employers for Tech Talent – Who is Winning the Tech Talent War?			July 2022
Top GBS Employers™ in India, the Philippines, and Poland – 2022			August 2022
Webinar Deck: Winning Employer Value Propositions: Strategies from Top GBS Employers			June 2023
Top GBS Employers™ in India, the Philippines, and Poland – 2023			July 2023
Webinar Deck: The 2023 Top Employers for Tech Talent: Insights to Create a Powerful Employer Value Proposition			July 2023
Top Employers for Tech Talent™ in India, the US, and the UK – 2023			July 2023
How GBS Organizations Build Differentiated Employer Brand Perception			August 2023
Talent Demand Trends India IT Services – H2 2023			February 2024
GBS Executive Insights: Key Issues for 2024			February 2024
Top GBS Employers™ in India, the Philippines, and Poland – 2024			July 2024
Top Employers for Tech Talent™ in India, the US, and the UK – 2024			Q3 2024
Webinar Deck: Evaluating Brand Perception Data to Improve EVP and Talent Attraction			Q3 2024
How GBS Organizations Build Differentiated Employer Brand Perception – 2024			Q3 2024
Improving the Robustness of the Talent Acquisition Supply Chain			Q3 2024
Generative AI in GBS Talent Management			Q4 2024

Note: [Click](#) to see a list of all of our published GBS Talent Excellence reports

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