TALENT POOL
Landscape Study Gothenburg (Sweden)
CONTENTS

1. Geographical Location
2. Employment Ecosystem
3. Talent Availability (Graduate Pool)
4. Talent Availability (Experienced Pool)
5. Ease of hiring talent
6. Salary Expectations
Objective
To study and benchmark market information about various language resources in the geographic location of Gothenburg in Sweden, Employment Ecosystem, Graduate/Experienced talent pool availability, ease of hiring talent, salary expectations.

Our Solution
Use a combination of primary and secondary research sources along with our proprietary talent research intelligence to validate Language Resource market information. This will be for client target locations to initiate/setup new IT/BPO process.

Roles: Digital Marketing, Content Operations, Customer Support, Technical Support

Languages: German, French, Dutch, Swedish, Norwegian, Finnish, Danish, Arabic

Outcome
This report provides market information about the language resources pool across above 4 job roles across in Gothenburg city proximity that enable business stakeholder to align and finalize hiring decisions.

- Availability of language resources from different market players in IT & BPO
- Hiring and related insights specific to target roles and practices
Geographical Location

- Insights/POV in relation to availability of experienced language resources from nearby bordering countries
- Insights/POV in relation to proficiency of language skills broken down in accordance to European Language Proficiency Scale.
- Proximity to educational institutions providing access to graduate pool
### Sweden

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Population</td>
<td>10 Million</td>
</tr>
<tr>
<td>ICT Pool</td>
<td>~2,00,000*</td>
</tr>
<tr>
<td>IT Pool</td>
<td>~75,000</td>
</tr>
<tr>
<td>BPO Pool</td>
<td>~1,60,000**</td>
</tr>
<tr>
<td>As of 2018</td>
<td>~11,000 students graduated in Information and communications technology</td>
</tr>
</tbody>
</table>

### Gothenburg Region

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Population</td>
<td>1.2 Million</td>
</tr>
<tr>
<td>ICT Pool</td>
<td>35,000</td>
</tr>
<tr>
<td>IT Pool</td>
<td>~22,000</td>
</tr>
<tr>
<td>BPO Pool</td>
<td>~20,000</td>
</tr>
<tr>
<td>As of 2018</td>
<td>~3000 students graduated in Information and communications technology</td>
</tr>
</tbody>
</table>

### Major Employers in Gothenburg Region

- Geely Volvo
- SKF
- AstraZeneca
- Ericsson
- Essity
- SAAB
- SAAB
- Autoliv
- SCA Hygiene Products
- Volvo IT AB
- Latour
- Getinge
- Bilia
- Stena Sphere
- Capio

---

* Sweden ICT workforce is about 3.9% of overall labor force
** Full time & number of outsourced FTE

---

Source: Business Region Goteborg, Invest in Gothenburg, Study in Sweden, Hirexa Analysis: Primary & Secondary, etc.
Insights in relation to availability of experienced language resources from nearby bordering countries

**Insights:**

- 3,500,000 professionals work in the Finnish ICT and mobile industry, with 15,000 science and technology students graduating annually from local universities.

- In Denmark, 11,065 women & 9,188 men graduates have done Bachelors programmes. Based on the increasing demand for IT specialists in recent years, forecasters estimates that by 2030 there will be an unmet potential demand for 19,000 IT specialists. This is despite an expected increase of about 36,000 people by 2030 with an IT education.

- In Norway, local strategy partners are providing courses in basic skills, Norwegian language training and the development of a two-year vocational training scheme to strengthen skills among adults with poor basic skills, poor Norwegian skills and without completed upper secondary education.

Source: Invest in Finland, Statistics Denmark, Strategy for Denmark’s Digital Growth, Norwegian strategy for skills, World Atlas, etc.
Insights in relation to proficiency of language skills broken down in accordance to European Language Proficiency Scale

**Norway**
- Major Language availability
  - English
  - German
  - French
  - Russian
- Approx Talent availability (Target Language & Skill) 500~800

**Finland**
- Major Language availability
  - English
  - Finnish
  - Swedish
  - Russian
- French
- Approx Talent availability (Target Language & Skill) 1500~2000

**Denmark**
- Major Language availability
  - English
  - Danish
  - German
  - French
  - Faroese
  - Greenlandic
  - Swedish
- Approx Talent availability (Target Language & Skill) 800~1200

- Norwegian, which is a North Germanic language that is closely related and mutually intelligible with Swedish and Danish languages
- In Finland 15,000 science and technology students graduating annually from local universities.
- Danish workforce speak more than 55% English, 47% German, 13% French and 10% Swedish. Additionally 2% of the Danish population speaks Dutch, 2% speaks Spanish and 1% speaks Italian.
- Percentage of the Denmark population that has attained at least upper secondary education is 80%.

Source: Study Country, world Atlas, Language Knowledge, Invest in Finland, Facts about the Danish labour market, etc.
Sweden witness to have overall 38 Universities including both private and public

<table>
<thead>
<tr>
<th>Name</th>
<th>University / Institute</th>
</tr>
</thead>
<tbody>
<tr>
<td>University of Gothenburg</td>
<td>University</td>
</tr>
<tr>
<td>Chalmers University of Technology*</td>
<td>University</td>
</tr>
<tr>
<td>Nordic College for Public Health</td>
<td>College/Institute</td>
</tr>
</tbody>
</table>

Other Insights:
Gothenburg region’s two universities collectively have around 50,000 students. "In terms of human capital and lifestyle, Gothenburg ranks highly among large European cities.

University of Gothenburg
- 38,500 student community, where 66% women & 34% men.
- 6,400 employees, where 59% women & 41% men.
- Offers two departments in IT, which are Applied Information Technology and Computer Science and Engineering.

Chalmers University of Technology
- Around 2,000 undergraduates study one of Chalmers’ ICT programmes.
- Chalmers has 157 partner universities within the ERASMUS programme (European Community Action Scheme for the Mobility of University Students). Initiative run by the European Union (EU) It provides opportunities for students to study or gain work experience in a different European country while completing a degree.

*Chalmers University of Technology has two main facilities,
  - Chalmers Lindholmen University College
  - IT University of Göteborg (joint organization between Chalmers University of Technology and University of Gothenburg, to support research, education and collaboration within IT and communication (ICT)

Source: University of Gothenburg, Chalmers University of Technology, Business Region Goteborg, Hirexa Analysis: Primary & Secondary, etc.
Employment Ecosystem

- Main employers, all sectors
- Main employers, business services sector
- Total number of business services centres (SSC, BPO, IT, R&D, etc.)
- Total employed pool, all sectors
- Total # of employees, business services sector
### Main Employers Across Major Employment Sectors

#### Manufacturing
- Hasselblad
- Electrolux Group
- SKF
- Sandvik
- Elektron
- Flexlin
- Ballograf AB
- Berg Propulsion
- Boeing
- Emerson electric
- Jeppesen
- Johnson Controls
- General Electric
- Husqvarna
- Motorcycles
- Saab Automobile
- Arcam

#### Information Technology/Software
- Sopra steria
- Avanade
- Tech Mahindra
- Capgemini
- Accenture
- AKQA Inc
- Electronic Arts
- FARO Technologies
- Mathworks
- Luxoft
- Descartes Systems
- Meltwater
- HCL
- Consid AB
- Dell
- Volvo IT AB
- Zenuity
- Semcon
- Sigma IT Consulting
- Endian Technologies
- Assign Group AB
- Evolve Technology

#### Banking
- Nordea Bank
- Swedbank AB
- American Express
- Danske Bank
- Lånsförsäkringar
- Gothenburg and Bohus
- Volvo finans Bank
- Forex Bank
- Amfa Bank AB
- wasaKredit
- AB Stena Metall Finans
- Reducero
- Office goth

#### Energy & Utilities
- Dong Energy AB
- Pulsteknik AB
- Göta Energi AB
- Dalkia
- Schneider Electric Sverige AB
- Partille Energi Nät AB
- Göteborg Energ
- Ale Fjärrvärme AB
- United Sun Systems
- SVEA Solar
- Elkraft Sverige AB

#### Healthcare
- AstraZeneca
- Getinge Group
- SCA Hygiene Products
- Mölnlycke
- Dentsply
- Fosun Pharma
- Cerner
- Svenska Cellulosa AB
- Cochlear Anchor Solutions
- Vitrolife
- Abigo
- Capio
- Ascom
- Glooko
- IQVIA

#### Automotive
- Geely Volvo
- Harman Becker
- CEVT
- WirelessCar AB
- Autoliv
- Tesla

#### Retail
- H&M
- ICA Sverige AB
- Essity
- Timberland
- Michael Kors
- Aesop

---

**Note:** Main employers are based on the total employee size / key contribution to the local economy.

**Manufacturing:** It includes manufacturing facilities for automotive, engineering, power, defence, aerospace, consumer electronics, auto ancillaries, agriculture & forestry industries etc.

**Healthcare:** It includes public & private healthcare center, healthcare programme, Healthcare Services, etc.

**IT/Software:** It includes information technology services companies, Shared services centers/global in-house centers, ICT relevant R&D centers, BPO services

**Energy & Utilities:** It includes any upstream, downstream and mid stream players across oil & gas industries.

**Banking:** It includes local and MNC banking sectors, financial and insurance services players, stock exchange /any monetary administration units.

**Retail:** It includes Suppliers, Distributers, Sales Channel providers, etc.

**Source:** Business Region Goteborg, Hirexa Analysis: Primary & Secondary, etc.
Total Employed Pool Across Major Sectors

Compared with overall Sweden, the Gothenburg region has a larger proportion of its population employed within business services, commerce, manufacturing and transportation. However, the proportion in the Gothenburg region is smaller than the national average within health care and care, public administration and construction.

<table>
<thead>
<tr>
<th>Sector</th>
<th>Gothenburg</th>
<th>National Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Healthcare</td>
<td>94354</td>
<td></td>
</tr>
<tr>
<td>Manufacturing and mining</td>
<td>84796</td>
<td></td>
</tr>
<tr>
<td>Transportation</td>
<td>77332</td>
<td></td>
</tr>
<tr>
<td>Commerce</td>
<td>73925</td>
<td></td>
</tr>
<tr>
<td>Education</td>
<td>60509</td>
<td></td>
</tr>
<tr>
<td>Business services</td>
<td>37529</td>
<td></td>
</tr>
<tr>
<td>Construction</td>
<td>29857</td>
<td></td>
</tr>
<tr>
<td>Public administration</td>
<td>28209</td>
<td></td>
</tr>
<tr>
<td>Information and communication</td>
<td>35,000</td>
<td></td>
</tr>
<tr>
<td>Others</td>
<td>81360</td>
<td></td>
</tr>
</tbody>
</table>

~6,02,900 people are employed in Gothenburg Region

Healthcare: It includes public & private healthcare center, healthcare programme, Healthcare Services, etc. Retail/Commerce: It includes online services, buying, selling, etc. Business Services: It includes Micro, Small, Medium size Business, etc. Manufacturing & Mining: It includes manufacturing electronic & electrical equipments, timber and paper production, food production, chemical & metal production units. Education: It includes state, municipal educational institutions/universities/colleges. Construction: It includes civil engineering, repair, reconstruction work etc. Transportation: It includes logistics, warehousing and customer operations. Public Administration: Includes central government, state government institutes, defence & security. Information and communication: It includes information technology services companies, Shared services centers/global in-house centers, ICT relevant R&D centers, BPO services, etc. Others: It includes Personal and cultural services, Hotels and restaurants, Financial services and insurance, Energy & Environmental Technology, Agriculture, forestry and fishing, etc.

Source: Business Region Goteborg, Invest in Gothenburg, Hirexa Analysis: Primary & Secondary, etc.
<table>
<thead>
<tr>
<th>Type Centers</th>
<th>Definitions</th>
<th>No of Centers</th>
<th>Examples (Non Exhaustive)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Information Technology Outsourcing (ITO)</td>
<td>Any services companies it offers IT services like application development maintenance, system integration services, package implementation, IT infrastructure support, product engineering services and digital technology services to local/global customers</td>
<td>80~100</td>
<td>Tech Mahindra, Volvo IT AB, Capgemini, HCL, Sopra steria, Avanade</td>
</tr>
<tr>
<td>Business Process Outsourcing (BPO)</td>
<td>Any services companies offers majorly on business support services like F&amp;A, Contact centers, HRO, Supply chain operations, sales and marketing services and other back office operations</td>
<td>40~50</td>
<td>SYKES, Callsign, Teleperformance, ProffsCall</td>
</tr>
<tr>
<td>Shared Service Centers (SSC)</td>
<td>Its an global/regional delivery center which serve IT services or Business support services to their parent organization / its own subsidiaries. It also known as Global in-house centers / Captive centers</td>
<td>20~30</td>
<td>Sigma IT Consulting, Volvo IT, AstraZeneca, America Express</td>
</tr>
<tr>
<td>Research &amp; Development (R&amp;D)/Product Development Centers</td>
<td>Any innovation hubs, research centers, product development centers related to information technology, software, IT hardware, Digital technology, Telecom , industrial automation and electronics research or product development centers (Not considered any non- ICT ecosystems)</td>
<td>10~15</td>
<td>Ericsson, Dell, Mathworks, Semcon, Endian Technologies</td>
</tr>
</tbody>
</table>

Source: Hirexa Analysis: Primary & Secondary, etc.
Main employers by business services sector (ITO, BPO, SSC and R&D/Product Development)

ICT is one of the Gothenburg region's strongest growth industries spanning more than 5,300 different companies. These include Ericsson, along with the company's second largest research and development facility, Volvo IT etc. Sweden is a world leader in the IoT revolution and also they have five strength areas like Embedded Systems, Infrastructure & Cloud, Mobile Technology, Microwaves and Visualization & Gaming.

Approximate talent pool across business services sector like ITO, BPO, Shared Services Center and R&D/Product development centers

Source: Business Region Goteborg, Invest in Gothenburg, Hirexa Analysis: Primary & Secondary, etc.
Total Number of Employees in Business Services Sector (ITO & BPO)

Great language skills, low employee turnover, high computer literacy, technically advanced infrastructure and competitive operating costs are some of the factors that attract international businesses to Sweden.

- Overall employment rate in the Gothenburg city/region is growing at a faster rate than the national average. The ongoing digital transformation brings about incalculable opportunities in this region in IT and BPO services business.
- Sweden is a very developed, high-end market for contact centers covering Northern Europe. Extensive language skills, computer literacy and attractive costs are some of the advantages. Key characteristic of the call-center market in Sweden is the focus on IT and technical help desks. There is also a heavier focus on the telecom industry in Swedish call centers compared to the European average.
- Sweden is the largest labor pool in Scandinavia with multilingual Nordic capacity – Swedish, Finnish, Norwegian, and Danish. In the service agencies, 45 percent use the Scandinavian languages daily. The language factor is a strong reason to locate a call center in Sweden.

Source: Business Region Goteborg, Invest in Gothenburg, Business Sweden, Hirexa Analysis: Primary & Secondary, etc.
Talent Availability (Graduate Pool)

- Number of universities/relevant education institutions
- Total number of graduates
- Number of graduates in Digital Marketing, Business, IT and Management
- Number of language graduates
Number of Universities/Relevant Education Institutions and Graduate Supply from Gothenburg

2
No of Universities are in Gothenburg

25,000
Total Number of Students Enrolled every year in Gothenburg region Universities

19,290
Number of Graduate talent supply from Gothenburg YoY

From the overall graduate talent supply of ~19,290 there will be more than 45% of students know one or multiple languages among target list. Spanish, Germany and French are the highest after Swedish language. These language talent supply support growing BPO/Call center market in entire Gothenburg.

Foreign Language Talent Supply Generated by Language Schools in Sweden/Gothenburg Region

- Students in Swedish primary schools can choose a foreign language (most often Spanish, French, German, and sometimes other languages such as Russian, or extra English or Swedish).
- Normal Students will have 17 grades, as most study a third language – traditionally German or French, but in recent years Spanish has become the most widely studied.

*The same school offers multiple language course

Source: Business Region Goteborg, Invest in Gothenburg, Hirexa Analysis: Primary & Secondary, etc.
### Number of Graduates in Digital Marketing, Business, IT and Management

<table>
<thead>
<tr>
<th>Approx Graduate Talent Supply (YoY)</th>
<th>Gothenburg</th>
<th>Sweden</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total number of graduates</td>
<td>19,290</td>
<td>66,350</td>
</tr>
<tr>
<td>Number of graduates in Social sciences and law</td>
<td>5,118</td>
<td>18,130</td>
</tr>
<tr>
<td>Number of graduates in Engineering and Technology</td>
<td>3,083</td>
<td>10,960</td>
</tr>
<tr>
<td>Number of graduates in Natural Sciences, Mathematics &amp; Computer Science</td>
<td>1,348</td>
<td>4,750</td>
</tr>
<tr>
<td>Number of graduates in Foreign Languages</td>
<td>2,500</td>
<td>7,000</td>
</tr>
<tr>
<td>Others Graduates: Health Sciences and Social care, Education, Agricultural Sciences and Veterinary Medicine</td>
<td>7,241</td>
<td>25,510</td>
</tr>
</tbody>
</table>

In Swedish Digital Sector, the biggest obstacle to continued growth in the digital sector is the lack of excellence in IT, telecom and other forms of digitization. A deficit of the order of 70,000 persons will be deferred until 2022 unless special efforts are made.

In order to address the skills shortage advocates IT & Telecom companies a number of short- and long-term, divided into four areas,

1. General stronger focus on Digitalization – Skills development
2. Investment in Education, youth & Career – resource efforts school institution digitization, reforming teacher
3. Investment in Higher Education & Training in Career – reward high quality higher vocational education
4. Promotion of migration & integration – 10,000 or more top international students

**Social sciences and law:** Any relevant business management degree in finance, HR, sales & marketing, general business management, strategic business, etc  
**Natural Sciences, Mathematics & Computer Science:** Any non ICT streams like Mechanical engineering, Chemical, Electrical, Bio-Technology, Nuclear, Power, etc  
**Engineering and Technology:** Graduating ICT relevant fields like information technology, Software, IT hardware, Telecom and Networking, etc  
**Foreign languages:** Graduating specific to any foreign languages which includes German, French, Russian, Spanish, Arabic, Mandarin, Korean, etc

Source: IT&Telekomforetagen, Trends & Developments of Sweden, Hirexa Analysis: Primary & Secondary, etc.
Number of Language Graduates Supply from Gothenburg

Language graduate talent supply: ~14,000

- Graduates in foreign language: ~12,000
- Other graduates with language proficiency: ~2,000

<table>
<thead>
<tr>
<th>Foreign Language</th>
<th>Approx Graduate Talent Supply*</th>
</tr>
</thead>
<tbody>
<tr>
<td>English</td>
<td>~11,000</td>
</tr>
<tr>
<td>Spanish</td>
<td>~8,000</td>
</tr>
<tr>
<td>French</td>
<td>~6,000</td>
</tr>
<tr>
<td>German</td>
<td>~4,500</td>
</tr>
<tr>
<td>Russian</td>
<td>~4,000</td>
</tr>
<tr>
<td>Others**</td>
<td>~1,000</td>
</tr>
</tbody>
</table>

*Above numbers includes talent mix who knows multiple languages

**Others: Finnish, Danish, Norwegian, Italian, Japanese, etc

Graduates in foreign language – Graduating specific to any foreign languages which includes English, Russian, French, German, etc in 2-3yrs of course curriculum

Other graduates with language proficiency: Graduates from engineering, economics, ICT, management, arts & science, etc cum with native/bi lingual in one or multiple foreign language or with certifications done who manage to speak/read/write. It exclude local/regional EE countries national languages and English

Source: Hirexa Analysis: Primary & Secondary, etc.
Talent Availability (Experienced Pool)

- Talent availability (experienced pool) broken down across 3 clearly defined job descriptions: Digital Marketing, Content Operations, Customer Support, Technical Support

- Further broken down per role by in-scope languages (French, German, Swedish, Norwegian, Danish, Dutch, Finnish, Arabic)
<table>
<thead>
<tr>
<th>Role Descriptions</th>
<th>Total Pool</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Digital marketing</strong></td>
<td>~1,500</td>
</tr>
<tr>
<td>Bid and Keyword Management. Analysis of Cost Per Click, Conversion Data and Ad Expenditure WITH THE OBJECTIVE of developing, monitoring and improving digital campaigns Digital campaign optimization for different platforms; Report Creation and analysis in support of ad optimization strategies; Management of Keywords packs, bids and ad budgets WITH THE OBJECTIVE of improving campaign ROI and increasing customer revenue</td>
<td></td>
</tr>
<tr>
<td><strong>Content operations</strong></td>
<td>~1,000</td>
</tr>
<tr>
<td>Review flagged content and enforce community standards as per policy and guidelines WITH THE OBJECTIVE OF improving platform health and user safety Triage enquiries and escalations from multiple sources, reviewing the content and allocating issues to the correct area for resolution. Communicating with original source of the outcome of the investigation WITH THE OBJECTIVE OF supporting clients, improving platform health and user safety</td>
<td></td>
</tr>
<tr>
<td><strong>Customer Support</strong></td>
<td>4,000~4,500</td>
</tr>
<tr>
<td>Fluency in the Supported Language plus the ability to read, write, comprehend and have conversations in English • 2+ years of customer interaction experience via customer support or sales • Experience working in a B2B environment and active use of Digital/Internet and CRM systems • Experience working in a multi-channel support environment supporting digital products&quot;</td>
<td></td>
</tr>
<tr>
<td><strong>Technical support</strong></td>
<td>3,000~3,200</td>
</tr>
<tr>
<td>Respond to customer issues across multiple communication channels (voice, chat, email, VC) in a helpful, timely, and empathetic manner WITH THE OBJECTIVE OF identifying new issues, resolving ongoing concerns and increasing customer satisfaction Resolve technical queries and troubleshooting for hardware, ad platforms across consumers, B2B clients, partners and internal clients WITH THE OBJECTIVE OF identifying new issues, resolving ongoing concerns and increasing customer satisfaction</td>
<td></td>
</tr>
<tr>
<td><strong>Total Installed Pool</strong></td>
<td>9,500~10,500</td>
</tr>
</tbody>
</table>

Source: Hirexa Analysis: Primary and Secondary, Primary and secondary sources from Sweden & Gothenburg, etc.
Further Broken Down Per Role by In-scope Languages (French, German, Swedish, Norwegian, Danish, Dutch, Finnish, Arabic)

~8,000 installed talent market for target roles across languages with major contribution of 42% and 30% from customer support and technical support respectively. 72% of these target pool are having native/bi lingual language proficiency in Swedish and 18% in German, French, Norwegian and Finnish, other languages are very limited

<table>
<thead>
<tr>
<th>Role</th>
<th>German</th>
<th>French</th>
<th>Dutch</th>
<th>Swedish</th>
<th>Norwegian</th>
<th>Finnish</th>
<th>Danish</th>
<th>Arabic</th>
<th>Total Pool by Skill</th>
</tr>
</thead>
<tbody>
<tr>
<td>Digital Marketing</td>
<td>50~80</td>
<td>&lt;30</td>
<td>&lt;30</td>
<td>~800</td>
<td>50~80</td>
<td>&lt;30</td>
<td>50~80</td>
<td>&lt;30</td>
<td>1090~1210</td>
</tr>
<tr>
<td>Content Operations</td>
<td>50~80</td>
<td>&lt;30</td>
<td>&lt;30</td>
<td>~750</td>
<td>&lt;30</td>
<td>&lt;30</td>
<td>&lt;30</td>
<td>&lt;30</td>
<td>980~1010</td>
</tr>
<tr>
<td>Customer Support</td>
<td>150~200</td>
<td>100~120</td>
<td>50~80</td>
<td>~2,500</td>
<td>100~120</td>
<td>120~150</td>
<td>80~100</td>
<td>30~50</td>
<td>3130~3320</td>
</tr>
<tr>
<td>Technical Support</td>
<td>100~120</td>
<td>80~100</td>
<td>&lt;30</td>
<td>~1,800</td>
<td>80~100</td>
<td>80~100</td>
<td>50~80</td>
<td>&lt;30</td>
<td>2250~2360</td>
</tr>
<tr>
<td><strong>Total Pool by Language</strong></td>
<td>350~480</td>
<td>240~280</td>
<td>140~170</td>
<td>5850~5850</td>
<td>260~330</td>
<td>280~360</td>
<td>190~240</td>
<td>140~190</td>
<td>7450~8,000*</td>
</tr>
</tbody>
</table>

Highlighted skill areas found to be very limited/negligible talent supply

*Its include skill mix with one or multiple target languages

Source: Hirexa Analysis: Primary and Secondary, Primary and secondary sources from Sweden and, etc.
Ease of hiring talent
Display a grid showing relative ease (easy, medium, hard) to hire talent (increments: 5, 10, 25, 50 FTEs) within 3 months
Ease of Hiring for Entry Level Resources (1-3yrs) Across Target Roles with Language Proficiency

Based on the talent availability, Swedish, German and French are the language resources are feasible to attract incremental 10~25 hires in customer and technical support roles. Digital marketing and content operation skills are hard to fill more than 5 in across all languages except Swedish.

<table>
<thead>
<tr>
<th>Role</th>
<th>German</th>
<th>French</th>
<th>Dutch</th>
<th>Swedish</th>
<th>Norwegian</th>
<th>Finnish</th>
<th>Danish</th>
<th>Arabic</th>
</tr>
</thead>
<tbody>
<tr>
<td>Digital Marketing</td>
<td>5 10 25 50</td>
<td>5 10 25 50</td>
<td>5 10 25 50</td>
<td>5 10 25 50</td>
<td>5 10 25 50</td>
<td>5 10 25 50</td>
<td>5 10 25 50</td>
<td>5 10 25 50</td>
</tr>
<tr>
<td>Content Operations</td>
<td>5 10 25 50</td>
<td>5 10 25 50</td>
<td>5 10 25 50</td>
<td>5 10 25 50</td>
<td>5 10 25 50</td>
<td>5 10 25 50</td>
<td>5 10 25 50</td>
<td>5 10 25 50</td>
</tr>
<tr>
<td>Customer Support</td>
<td>5 10 25 50</td>
<td>5 10 25 50</td>
<td>5 10 25 50</td>
<td>5 10 25 50</td>
<td>5 10 25 50</td>
<td>5 10 25 50</td>
<td>5 10 25 50</td>
<td>5 10 25 50</td>
</tr>
<tr>
<td>Technical Support</td>
<td>5 10 25 50</td>
<td>5 10 25 50</td>
<td>5 10 25 50</td>
<td>5 10 25 50</td>
<td>5 10 25 50</td>
<td>5 10 25 50</td>
<td>5 10 25 50</td>
<td>5 10 25 50</td>
</tr>
</tbody>
</table>

Ease of Hiring to hire talent (Increments: 5, 10, 25, 50 FTEs) within 3 Months

<table>
<thead>
<tr>
<th>Ease</th>
<th>Medium</th>
<th>Hard</th>
</tr>
</thead>
<tbody>
<tr>
<td>Easy</td>
<td>Medium</td>
<td>Hard</td>
</tr>
</tbody>
</table>

Source: Hirexa Analysis: Primary and Secondary, Primary and secondary sources from Sweden and, etc.
Salary Expectations

- Market average salary for entry-level professionals (i.e., experience level of 1-3 years) for native language delivery for in-scope roles

- Bonus percentage needed to be paid to attract in-scope languages
### Market Average Salary for Entry-level professionals (i.e., experience level of 1-3 years) for Native Language Delivery for in-scope roles

<table>
<thead>
<tr>
<th>Skill Areas</th>
<th>Market average salary for entry-level professionals (1-3 Yrs.) (In Dollar/Month)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Digital Marketing</td>
<td>$2,900~$3,200</td>
</tr>
<tr>
<td>Content Operation</td>
<td>$2,200~$2,500</td>
</tr>
<tr>
<td>Customer Support</td>
<td>$2,000~$2,500</td>
</tr>
<tr>
<td>Technical Support</td>
<td>$2,600~$3,000</td>
</tr>
</tbody>
</table>

- Since 2000, 74% increased in Total Wage sum and Sweden all time expensive country in terms of employer cost after France by considering Net income, Taxes, Employee & Employer social security, etc. Unemployment is low in Sweden and contracts between employees and employers are not required. Since Sweden has a well-educated workforce and provides generous benefits to its workers (which attract many international job seekers), employers rarely have trouble recruiting qualified talent from inside or outside Sweden’s borders. There is no legal minimum wage in the country, though salaries are often negotiated by collective bargaining between trade unions and employers.

- Blended average IT market salary in Sweden is $5,600 per month which is second highest sector pay after Banking and Financial Services

- In Sweden, there are many laws regulating work life and employment, there is no minimum salary in Sweden. Any number that the employee accepts is legal. Instead, collective agreements are often made between employers and trade unions. Actually, almost 90 percent of all Swedish companies are covered by such agreements - kollektivavtal

Source: Business Region Goteborg, Statistics Sweden, Hirexa Analysis: Primary & Secondary, Primary and secondary sources from Salary Survey, etc.
Market Average Salary for Entry-level professionals (i.e., experience level of 1-3 years) for Native Language Delivery for in-scope roles

<table>
<thead>
<tr>
<th>Skill Areas</th>
<th>Market average salary for entry-level professionals (1-3 Yrs.) (In Euro/Month)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Digital Marketing</td>
<td>2,000~2,200</td>
</tr>
<tr>
<td>Content Operation</td>
<td>1,500~1,800</td>
</tr>
<tr>
<td>Customer Support</td>
<td>1,200~1,500</td>
</tr>
<tr>
<td>Technical Support</td>
<td>1,600~2,000</td>
</tr>
</tbody>
</table>

- The minimum monthly wage in Estonia is 500 euros. In the 2nd quarter of 2018, the average monthly gross wages and salaries in Estonia were 1,321 euros. The Average Monthly Net Salary is 1,040 € in Tallinn and 978 € in Tartu.

- If the working hours are at night (from 10:00 pm to 6:00 am), employers shall pay wages exceeding the normal wages by 1.25 times, unless it has been agreed that the wages include remuneration for working at night. Work during public holidays may be compensated either by offering time off or by paying 2 times the wages for the work.

- Payment for overtime – additional remuneration per hour of overtime is at least 50% of the rate of the hourly wage.

- Estonia is one of the fastest growing economies in the European Union, and the richest of the Baltic States.

Source: Wages and Salaries Statistics Survey, Hirexa Analysis: Primary & Secondary, Primary and secondary sources from Salary Survey, etc..
## Bonus Percentage Needed to be paid to attract in-scope languages

<table>
<thead>
<tr>
<th>Skill Areas</th>
<th>Additional Bonus For 1-3 Yrs. (In Dollar/Month)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Digital Marketing</td>
<td>$300~$350</td>
</tr>
<tr>
<td>Content Operation</td>
<td>$220~$250</td>
</tr>
<tr>
<td>Customer Support</td>
<td>$200~$250</td>
</tr>
<tr>
<td>Technical Support</td>
<td>$290~$330</td>
</tr>
</tbody>
</table>

• All employers in Sweden pay the Social Security contributions consisting of charges for pensions, health insurance and other social benefits, which amount to 31.42% of the gross salary. Employees pay 7% of their income to pension contributions, up to a maximum of SEK29,400 a year.

• One-time payments, such as bonuses, receive one-time tax deductions of 30-58 percent depending on income. All Sweden residents are liable to pay National and Municipal Swedish Tax on their worldwide income, and there is a 25 percent expatriate flat tax rate for non-residents.

• Sweden laws protecting employees are strong in Sweden, and are administered under the country’s Employee Protection Act, the Annual Leave Act, and the Working Hours Act. Sweden’s laws stipulate a 40-hour standard workweek and place caps on the amount of overtime allowable. No more 50 hours’ overtime over a calendar month is permissible and the absolute maximum overtime is 200 hours per calendar year. Overtime is usually paid at a rate of 50-100% more than the normal wage.

Source: Hirexa Analysis: Primary & Secondary, Wages and Salaries Statistics Survey, etc.
Thank You for your time.

If you need more details, please reach out to us.

info@hirexa.com
+44–203–8652540