BELARUS BUSINESS BAROMETER

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This paper has been prepared within an EU-funded project titled "Support to Belarusian businesses in exile and Association of Belarusian Business Abroad (ABBA) Capacity Development". Any statement presented in the report reflects solely the authors' views and does not imply a position of the European Commission.

ABBA – Association of Belarusian Business Abroad is the largest association of Belarusian business abroad bringing together over 100 members from 11 countries from the EU, UK, USA and Canada. ABBA's goal is to integrate, protect the interests and develop the legal and ethical businesses of entrepreneurs with Belarusian roots for the development of New Belarus as an independent democratic country.

CASE – Center for Social and Economic Research is an independent, non-profit research institute founded on the idea that research-based policy-making is vital for the economic welfare of societies. Established in Warsaw in 1991, CASE is recognised today as the top think tank in Central and Eastern Europe and one of the most highly regarded think tanks internationally. CASE carries out policy-oriented research and development assistance projects, specialising in 1) Fiscal, monetary and financial policies; 2) Sustainable development policies; and 3) Trade, innovation and productivity policies.

KEY FACTS (as of June 2024)

9,207 companies with Belarusian shareholders are registered in the EU in total (excl. self-employed persons) (at least)	**77%** of businesses with Belarusian shareholders in the EU are registered in Poland
63% of Belarusian companies in the EU were registered in 2020-2023	**20,100** jobs created by companies with Belarusian shareholders (excl. self-employed persons) in the EU (at least)
30,000 self-employed Belarusians are registered in the EU (at least)	**47%** of Belarusians in the EU have entrepreneurial potential: 18% have a company or registered self-employment, 29% are going to start businesses
224,552 is the estimated total number of Belarusians with long-term residence permits in the EU	**€399 million** was the cumulative turnover of top-20 Belarusian IT companies in the Baltic countries in 2023

1. INTRODUCTION

The private sector was the key driver behind the protests following the unfair presidential election in Belarus in August 2020 and faced a harsh response from the government, in the aftermath, leading to the first wave of business migration from the country. The political crisis affected many Belarusian private businesses across various sectors, including the self-employed. Factors with a negative impact on domestic business development included risk of inspections, closures, and arrests; reluctance to pay taxes to the regime; falling demand; lack of growth opportunities; the psychological state of employees; and deteriorating access to finance, credit and investment. According to a survey conducted in October–November 2021, approximately 62% of company representatives were considering moving their businesses abroad, and about a third of them indicated that they had already partially relocated their business.[1]

Subsequently, following the Russian invasion of Ukraine on 24 February 2022, the private sector experienced further pressure to relocate from Belarus due to the challenges related to the newly imposed economic sanctions against Belarus. These challenges included: i) the toxicity of Belarusian export-oriented companies, including those in the IT industry, resulting in the loss of western clients and higher operational expenses for existing contracts; ii) significant restrictions related to the Belarusian banking sector that made international payments and settlements to and from Belarus increasingly tricky, risky and expensive; iii) the looming threat of sanctions, posing a material risk to businesses; iv) western companies implementing supply boycotts against Belarus, leading to a fall in imports, supply chain disruptions, and inflated logistics expenditures; and v) increasing uncertainty and business costs due to the instability of the Belarusian rouble exchange rate and the reduced purchasing power of consumers in Belarus.

Deterioration in the business climate and restrictions against sole proprietorship led to business closures in Belarus. In 2023, the number of sole proprietorships in the country dropped by over 10,200 (-3.9%) and continued to decrease in 2024.[2] This seems to be the cumulative effect of entrepreneurial emigration from Belarus and the introduction of stricter rules for sole proprietorship in Belarus, aiming to stimulate micro-firm registrations instead.[3] However, the total number of firms in Belarus in 2023 (excluding sole proprietorship) increased by more than 4,090 (+2.8%). Some former self-employed persons left Belarus, contributing to the growth in entrepreneurial activity by Belarusians in the EU after 2020.

The report aims to estimate the entrepreneurial activity of Belarusians in the EU. We observe two types of business activities by Belarusians in the EU: businesses with Belarusian shareholders and self-employed Belarusian citizens.

The report is structured as follows: Section 2 presents the number of Belarusian enterprises in the EU, their dynamics and economic impact on the host countries, and the critical problems these businesses face. Section 3 covers the number of Belarusians in the EU and estimates the number of self-employed Belarusians. Section 4 presents the selected results of the largest businesses with Belarusian shareholders in the Baltic countries in ICT and the manufacture of electronic components. The Annex explains definitions, research methods and data sources.

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[1] Survey conducted by Imaguru Startup Hub and Coordination Council, covering 154 companies (the survey is no longer publicly available).

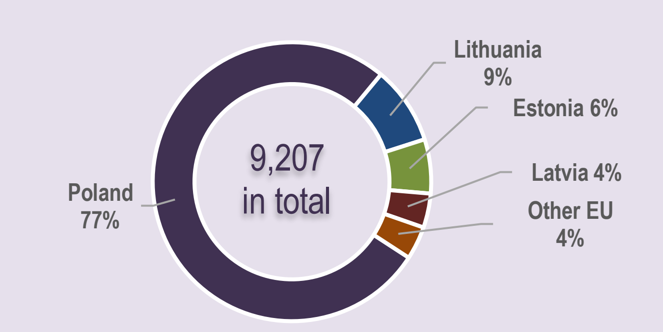
[2] Belstat, Основные социально-экономические показатели по Республике Беларусь, областям и городу Минску в январе-июне 2024 г., July 2024, link: https://www.belstat.gov.by/upload/iblock/20f/hittll1284v0lk1nk64651gw5c5q5ku9.pdf.

[3] The authorities have been running their anti-sole proprietorship campaign since 2021, with the aim of deteriorating the conditions for individual entrepreneurs to conduct business, ultimately aiming to limit their numbers. For example, from 17 August 2021, no sole proprietorship could be registered in Minsk due to what is known as "technical reasons". These technical issues persist to this day. Consequently, this should be perceived as a form of political repression against the private sector.

2. BELARUSIAN ENTERPRISES IN THE EU

We estimate that at least 9,207 businesses with Belarusian shareholders are registered in the EU (excluding self-employment). Most of them are registered in Poland (77%), while the Baltic states account for another 19% of all businesses with Belarusian shareholders (Figure 1). Poland, Lithuania, Estonia, and Latvia are the four key EU destination countries for Belarusian entrepreneurs.

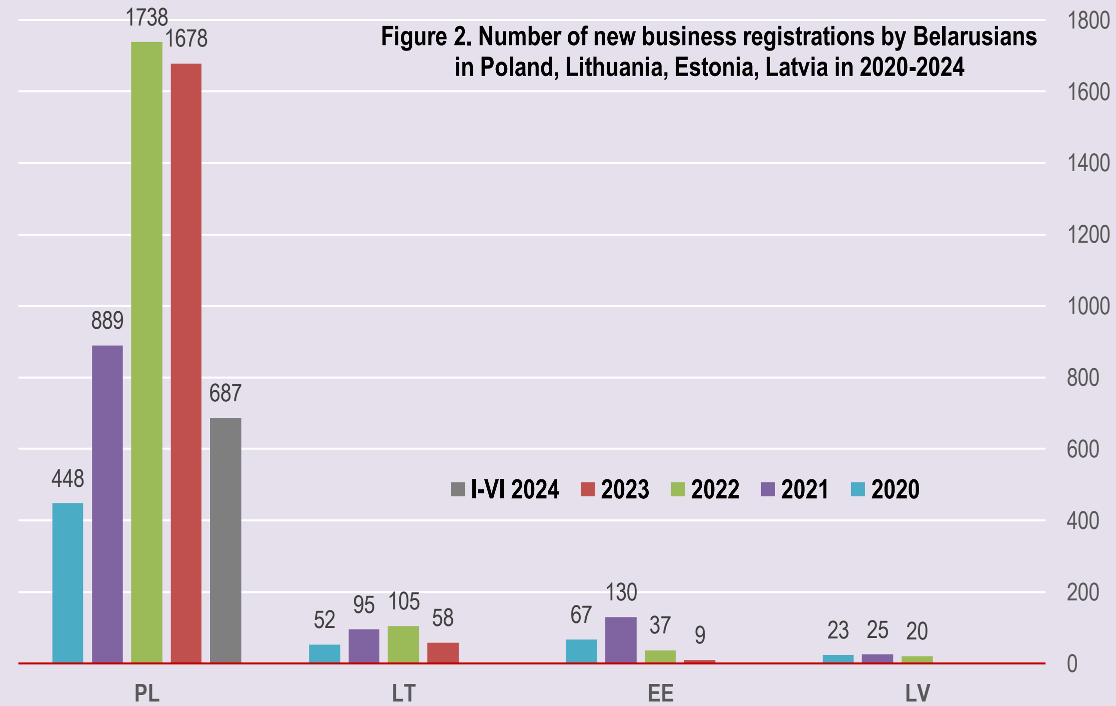
Figure 1. Total number of companies with Belarusian shareholders in the EU, as of June 2024



Source: Centralny Ośrodek Informacji Gospodarczej; okredo.com

The number of new business registrations in the four key countries was at a record high in 2022 (apart from Estonia), while registrations in 2023 slowed down (Figure 2). New business registrations in 2023 decreased in each of the four key countries. In particular, in Lithuania and Estonia, the number of registrations declined significantly compared to 2022 and even 2021. Data for 2024 are available for Poland only (January–June 2024) and indicate that the new business registrations slowed down compared to 2023.

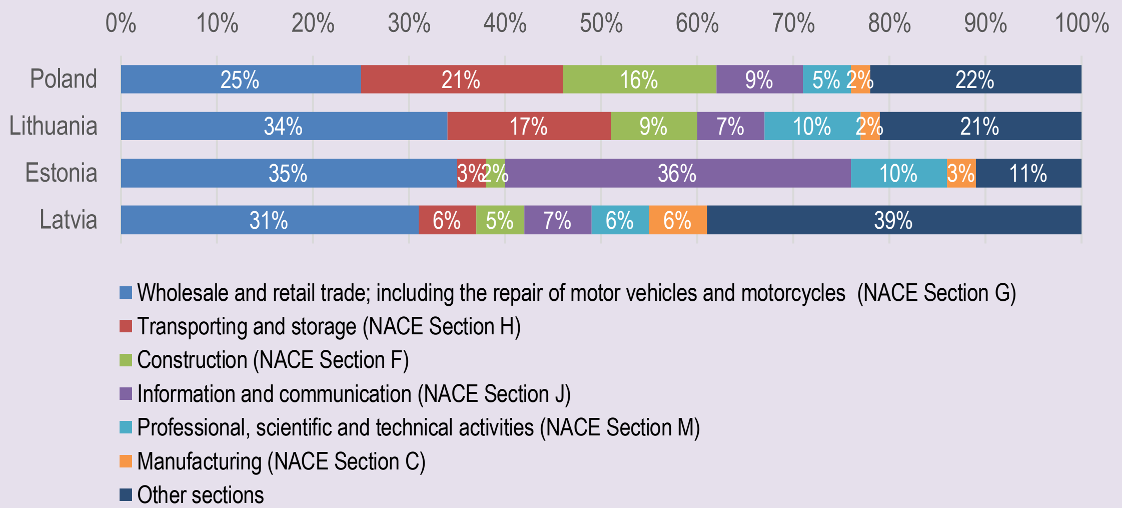
Figure 2. Number of new business registrations by Belarusians in Poland, Lithuania, Estonia, Latvia in 2020-2024



Source: own calculation based on data from Centralny Ośrodek Informacji Gospodarczej and Okredo.com as of January 2024

Businesses with Belarusian capital in the four analysed countries mainly operate in retail and wholesale trade, transport, construction, IT, and other services sectors. The top three sections of the economy with the highest number of enterprises in Poland are retail and wholesale trade, transport, and construction. For Lithuania and Latvia, retail and wholesale trade is the leading section. Whereas, the leading section in Estonia is information and communication. See Figure 3 for more details.

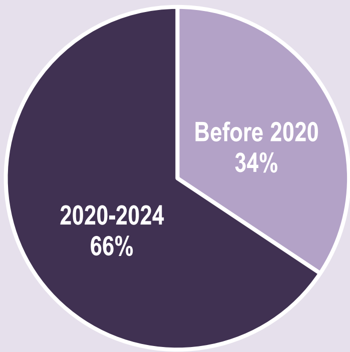
Figure 3. Distribution of firms with Belarusian shareholders by NACE sectors in Poland, Lithuania, Estonia, and Latvia as of January 2024



Source: own calculation based on data from Centralny Ośrodek Informacji Gospodarczej and Okredo.com as of January 2024

The Belarusian enterprises in the four analysed countries are predominantly micro and small firms with up to 50 employees. Most businesses (66%) were registered after 2020 (Figure 4). The survey of Belarusian companies in the EU in February–March 2024 indicated that 62% of all surveyed enterprises refer to their business as a business at an early stage of development: either the start of the company's life cycle (21% of those surveyed) or the development stage (41%).[4]

Figure 4. Company structure according to the registration date



Source: Centralny Ośrodek Informacji Gospodarczej; okredo.com

Less than half of the Belarusian enterprises in the EU are businesses relocated from Belarus, while the majority are new businesses started in the EU. A survey of Belarusian firm owners in the EU, conducted in February–March 2024, shows that 45% of businesses relocated from Belarus either completely (33%) or partially (12%). However, the majority of entrepreneurs (55%) started their business from scratch, either as their first entrepreneurial experience (40%) or after having operated in a different sector in Belarus (15%). Although smaller firms are more likely to relocate entirely, there are also cases of owners of large Belarusian firms leaving Belarus and selling or closing their companies to avoid the potential consequences of sanctions or political repressions.[5]

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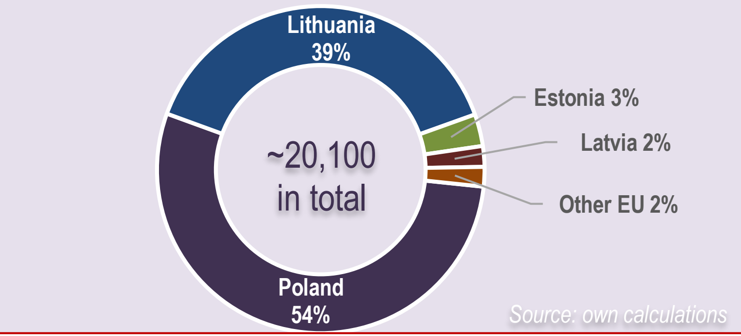
[4] See methodological annex for details of the survey.

[5] For example, Wargaming, Flo, Gurtam, and other large IT companies: https://devby.io/news/gurtam-akveo-vse.

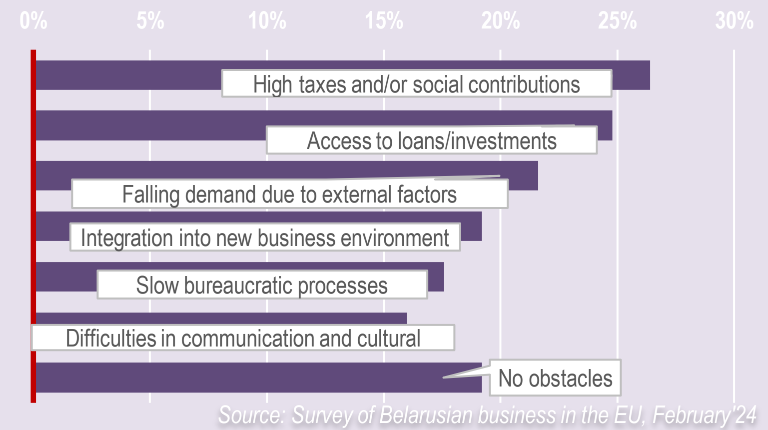
We estimate that enterprises with Belarusian shareholders in the EU have created at least 20,100 jobs (excluding self-employment). This estimate embraces two types of investment by Belarusian businesses in the EU: i) jobs due to the relocation of larger firms via national investment promotion agencies in Poland and Lithuania (mainly in the IT industry), and ii) new jobs created by micro and small enterprises with Belarusian capital (self-employment not included). The number of new jobs for large companies comes from official data on a pipeline of investment projects by Belarusian investors in 2020–2023 (available for Poland[6] and Lithuania[7]). New jobs created by micro and small businesses were calculated for each country based on the available statistics.[8] The results were compared to the average number of jobs created by micro and small enterprises in Poland, Estonia, Lithuania and Latvia.[9] The findings show that most of the employment was generated in Poland (54%), while businesses in Poland together with those in Lithuania accounted for 93% of all jobs created by enterprises with Belarusian shareholders.

Figure 5. Number of jobs created by companies with Belarusian shareholders in the EU, as of June 2024



The key reported obstacles for business development faced by Belarusian entrepreneurs in the four analysed countries are high taxes and/or social contributions, poor access to financial resources, and falling demand due to external factors. The survey of Belarusian entrepreneurs indicates that every fourth businessperson (26.4%) considers that the taxes and social contributions in their countries are high, and the access to loans and investment for developing the business is limited (24.8%). Every fifth business struggles with falling external demand (21.6%). In the top 6 issues, there is also poor integration into the new business environment (19.2%), slow bureaucratic processes that influence business development (17.6%), and difficulties in communication and cultural differences (16%).

Figure 6. Top 6 issues for Belarusian business in the EU



[6] https://www.paih.gov.pl/20230117/kolejny_rekordowy_rok_dla_paih /

[7] Data taken from the presentation by Karolis Žemaitis, Vice-Minister of Economy and Innovation of Lithuania presented at the Belarusian Business Forum in Vilnius on 26 April 2023. The data are consistent with the number of employees in large Belarusian IT companies in Lithuania: https://news.zerkalo.io/economics/46503.html.

[8] Available statistics on key economic indicators from open data portal Okredo (www.okredo.com; see Annex 1 for methodology) show that the average number of jobs per firm with Belarusian capital is 2.1 for Lithuania and 1.1 for Latvia. For Estonia and other EU countries, we assume the same level as for Latvia, and for Poland the same level as for Lithuania.

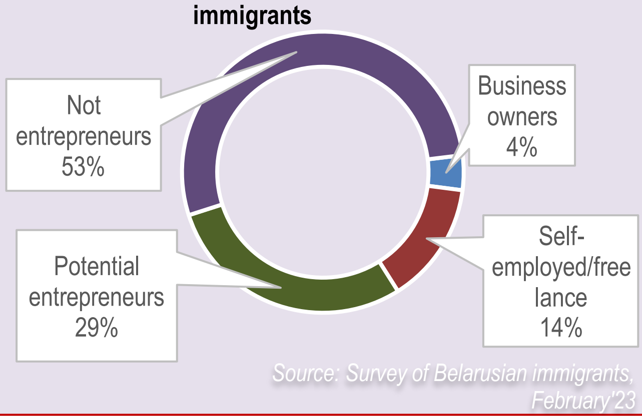
[9] In 2022, the average number of people employed by SMEs in Poland was 3.1 per enterprise, in Lithuania 3.3, in Latvia 4.4, in Estonia 4.3, and in the EU on average 3.4 (Source: www.statista.com).

3. SELF-EMPLOYED BELARUSIANS IN THE EU

Belarusian immigrants in the EU are relatively risk-tolerant, and this characteristic has a positive impact on their entrepreneurial potential. Both historical evidence and empirical research show that the entrepreneurial potential of immigrants is high, which makes them not only "job takers" but also "job creators".[10] Migrants have a personality-based self-selection driver, particularly a propensity for risk-taking that increases their tolerance of the risk of starting and running a business.[11] In the case of Belarusian immigrants in the EU, they often left their home country after participating in street protests or supporting the protests in various ways.[12] We reckon that Belarusian immigrants in the EU tend to have relatively high-risk tolerance, which corresponds with easier entrepreneurial decision-making, meaning they find it easier to make decisions concerning starting and running businesses abroad in various legal forms.

According to the survey of the Belarusian diaspora in February 2023[13], 18% of these immigrants can be treated as active entrepreneurs: 4% of surveyed adults are business owners employing staff, and 14% are self-employed or freelancers (Figure 7). However, another 29% are potential entrepreneurs (planning to start a business in the next three years, including 9% already taking some steps), while 53% do not see themselves as entrepreneurs and have no intention of becoming one. This distribution was similar to the results of a survey conducted among the population of Belarus in 2021 as part of the Global Entrepreneurship Monitor (GEM).[14] According to the latter, 19% of the population of Belarus aged 18–65 years were classified as entrepreneurs (at different stages of entrepreneurial activity, including 5.5% as owners of an established business) and 30% as potential entrepreneurs.[15] The GEM results for the key host countries in 2023 are as follows: in Poland, 11.4% of the adult population are classified as entrepreneurs (including 9.8% – owners of an established business); in Lithuania there are 21% of entrepreneurs (including 8.3% – owners of an established business); and in Latvia 26.5% of the adult population are classified as entrepreneurs (including 12.3% – owners of an established business).

Figure 7. Entrepreneurial potential of Belarusian immigrants

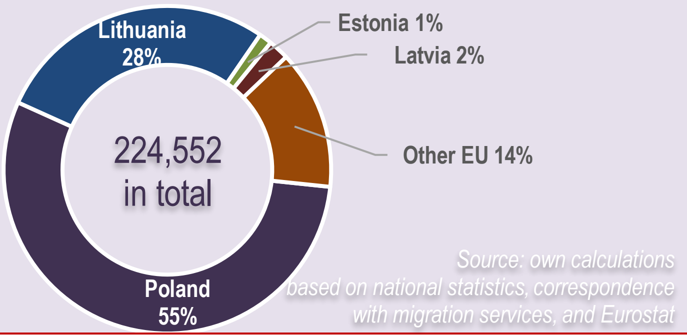


The total number of Belarusians with residence permits in the EU is estimated to be at least 224,552 as of June 2024. This number includes persons with all types of continuous residence permits allowing for employment in the host country, such as permanent residence permits, temporary residence permits, long-term EU residence permits, temporary protection, refugee

[10] See Jaeger et al. (2010), Direct evidence on risk attitudes and migration. The Review of Economics and Statistics, v.92.
[11] Vandor P. (2021), Why Immigrants Are More Likely to Become Entrepreneurs. Harvard Business Review, August, 2021.
[12] For instance, many businesses or businessowners in Belarus supported the national strike on 26 October 2020 and experienced economic pressure from the authorities in response to that strike.
[13] See more details in Annex 1.
[14] Our results cannot be compared directly with the GEM results due to methodological differences; GEM results are used as a benchmark of entrepreneurial engagement for Belarus in 2021 and for the key host countries in 2023.
[15] GEM Belarus 2021-2022. Source: https://beroc.org/upload/medialibrary/2da/2da746a1918dd7594056133e7faf2e08.pdf

status, and humanitarian stay (visas not included[16]). There have been two large waves of immigration from Belarus in the past several years: after the start of the political crisis in August 2020, and after the outbreak of the mass-scale war in Ukraine on 24 February 2022. Based on the statistics provided by national authorities,[17] we can see that the key countries chosen by Belarusians as their main destination are Poland (58%) and Lithuania (29%). From May 2022, Latvia and Estonia have started to limit Belarusians' access to their countries by introducing stricter visa requirements, and almost stopped issuing first residence permits for Belarusian citizens. Over time, Lithuania has also tightened its admission and legalisation criteria for Belarusian immigrants.

Figure 8. Total number or Belarusians with long-term residence permits in the EU, as of June 2024



Based on the migrant stock data and share of self-employed Belarusians resulting from the Belarusian diaspora survey findings, the self-employment potential of Belarusians in the EU is estimated to be at least 30,000 business entities. This estimate is very conservative, as according to official data from Poland, between January 2022 and June 2023, Belarusians registered 11,716 sole proprietorships in Poland.[18]

IT specialists constitute a significant share of self-employed Belarusians, and their outflow from Belarus accelerated significantly after February 2022. According to official Polish data, among 11,716 of the Belarusians registered as self-employed between January 2022 and June 2023, 66% were engaged in IT activities.[19] In 2022–2023, employment in the IT industry in Belarus dropped by almost 20,000 compared to 2021 (-18%), while both in 2020 and 2021 the employment in the IT industry grew.[20] Poland has been the key destination for the relocation of Belarusian IT specialists,[21] primarily due to the intentionally designed Poland Business Harbour (PBH) program, which aimed to attract IT specialists to the country. From August 2020 until the end of January 2024, 149,731 PBH visas were issued to Belarusians, although many of these visas were ultimately not used.[22] The PBH program in Poland was officially discontinued in January 2024.

Westward labour migration is not new to Belarusians. The 2021 CASE study argued that Belarusians preferred the EU labour market to Russia even before 2020, and the number of circular migrants from Belarus to the EU and EFTA countries was up to 70,000 by the end of 2019.[23] Recent data from May 2024 show that 58% of Belarusians received Polish residence permits for labour purposes[24], a decrease from 65% in August 2023.

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[16] Visa stays are not included in the calculation due to the lack of reliable data, and the fact that a visa does not provide the opportunity to start self-employment (the only exemption here is the Polish Business Harbour visa issued by Polish authorities, but, normally, after one year of having a PBH visa, a holder is obliged to apply for a temporary residence permit).
[17] Data provided by national authorities of Lithuania, Latvia, and Estonia in response to email requests.
[18] Polish Economic Institute, Weekly Economic Review as of 7 September 2023. Source: https://pie.net.pl/wp-content/uploads/2023/09/Tygodnik-PIE_36-2023.pdf.
[19] Ibid.
[20] https://devby.io/news/skolko-aitishnikov-23
[21] https://devby.io/news/relokeit-aitishniki
[22] https://www.gov.pl/attachment/8ea171ad-fc55-4c6b-885d-b9700bc1ae0d
[23] Kulesa A., Kaźmierkiewicz, P. (ed.) (2021), In Search of New Opportunities. Circular Migration Between Belarus and Poland, Slovakia and the Czech Republic – State of Play and Prospects for Cooperation. CASE Report, 2021.
[24] https://www.gov.pl/web/udsc/raport-dot-obywateli-bialorusi

4. SECTOR PROFILE: ICT AND MANUFACTURE OF ELECTRONIC COMPONENTS IN THE BALTIC COUNTRIES

This section presents the performance database of the largest businesses with Belarusian shareholders in the Baltic countries in two sectors: ICT and manufacture of electronic components. See Tables 1 and 2 for companies' details.

The ICT companies with Belarusian shareholders in the Baltic countries are concentrated predominantly in Lithuania, and specifically in Vilnius. Out of the top 20 companies according to sales, only five (EPAM, Andersen, Gurtam, Exadel, and Akveo) had been registered before 2020. However, they had hired very limited number of employees before 2020. This means that the Belarusian ICT sector has been actively relocating since 2020. In 2023, all companies were profitable (except for Wannaby) with total sales of almost EUR 400 million and over 3,700 employees.

Table 1. Top-20 ICT companies with Belarusian shareholders registered in the Baltic countries by sales

Company name	City, country	Year of registration	Sales in 2023, million EUR	Number of employees in 2023	EBITDA in 2023, %
EPAM Sistemos LT	Vilnius and Kaunas, LT	2014 (2022 in Kaunas as a separate company)	99.8	1251	13.9
Wargaming Vilnius	Vilnius, LT	2020	83.5	878	11.2
Andersen Soft	Vilnius, LT	2014	48.3	13	20.5
Gurtam	Kaunas, LT	2010	35.8	213	33
Melsoft	Vilnius, LT	2020	34.3	207	8.7
Flo Health	Vilnius and Kaunas, LT	2020 (2022 in Kaunas as a separate company)	20.4	242	13.4
Vention Development	Vilnius, LT	2021	11.3	168	2.44
EPAM Systems LV	Riga, LV	2021	10.9	137	8.8
Coherent Solutions	Vilnius, LT	2021	8.9	117	4.7*
Softeq Development	Vilnius, LT	2020	7.7	74	6.1*
Belka Games	Vilnius, LT	2020	6.4	55	1.1*
LeverX Lithuania	Vilnius, LT	2021	5.3	16	0.7
Godel Technologies	Vilnius, LT	2020	5.0	87	9.1*
IBA Lithuania	Vilnius, LT	2022	4.8	71	1.13*
Exadel LT	Vilnius, LT	2014	4.8	46	4*
Akveo	Vilnius, LT	2015	4.4	19	0.83*
SaM Solutions	Vilnius, LT	2021	2.9	59	11.4*
Itransition	Vilnius, LT	2021	1.6	28	5.9*
Wannaby	Vilnius, LT	2021	1.6	20	-0.83*
SoftTeco	Kaunas, LT	2021	1.2	10	19.1*
Total			**398.9**	**3,711**	

Source: okredo.com

** EBIT*

According to the State Tax Inspectorate under the Ministry of Finance of Lithuania,[25] Top 5 IT companies with Belarusian shareholders (from the table above) were among Top-25 largest taxpayers in the Information and Communication section in Lithuania in 2023:

- EPAM Systems (rank 4) – EUR 20.6 million of paid taxes,
- Wargaming (rank 5) – EUR 14.9 million of paid taxes,
- Andersen Soft (rank 15) – EUR 6.5 million of paid taxes,
- Gurtam (rank 21) – EUR 5.1 million of paid taxes,
- Melsoft LT (rank 22) – EUR 4.2 million of paid taxes.

Thus, only those five IT companies paid EUR 51.4 million of taxes in Lithuania, including CIT, indirect taxes (VAT, excises) and personal income tax. This stands for 6.4% of all taxes paid by 6,260 taxpayers (most likely, including self-employed) within Information and Communication section in Lithuania in 2023. In other words, only top 5 IT companies with Belarusian shareholders in Lithuania that have been actively relocating their personnel from Belarus since 2020 contributed 0.33% of total central budget revenues of Lithuania[26].

In the Baltic countries, there is a cluster of Belarusian businesses manufacturing electronic and optical products. Table 2 provides details for the top-10 companies in this cluster. The majority (six out of ten) of these businesses had been registered before 2020, while some (Yukon, Polimaster, Regula) have been present in the EU market for over 15 years. In 2023, all top-10 companies were profitable, with total sales of EUR 248 million and total employment of 1,023.

Table 2. Top-10 companies with Belarusian shareholders registered in the Baltic countries in the sector of electronic components

Company name	City, country	Year of registration	Sales in 2023, million EUR	Number of employees in 2023	EBITDA in 2023, %
Yukon Advanced Optics Worldwide	Vilnius, LT	2005	111.6	304	17.8
Pulsar Optics	Daugavpils, LV	2020	72.0	261	10.9
SMD Baltic	Daugavpils, LV	2017	19.4	149	15.6
Linev Systems EU	Kaunas, LT	2022	11.7	41	12.6
Regula Baltija	Daugavpils, LV	2005	11.6	99	18.4
VirPil	Alytus, LT	2017	9.0	40	6.3
I-Photonics	Vilnius, LT	2021	5.0	46	16.6*
Polimaster Europe	Vilnius, LT	1996	4.2	44	2.32*
NTLAB	Vilnius, LT	2000	2.3	25	19.7*
EssentOptics Europe	Vilnius, LT	2021	1.4	14	9.9*
Total			**248.2**	**1,023**	

Source: okredo.com
** EBIT*

[25] https://www.vmi.lt/evmi/en/daugiausiai-i-vmi-saskaita-sumokantys-mokesciu-moketojai (accessed on 10 October 2024).
[26] Based on Data on the Execution of the State budget and Municipal budgets, link: https://finmin.lrv.lt/media/viesa/saugykla/2024/2/G-wdZ7b0OF4.pdf (accessed on 10 October 2024).

ANNEX 1. DATA AND METHODOLOGY

Three methodological notes must be made here. First, we define an EU business with a Belarusian shareholder or Belarusian capital as an EU-based enterprise with at least one shareholder being a citizen of Belarus or a business registered in Belarus. The term "Belarusian business" in the text refers to a business with a Belarusian shareholder registered in one of the EU countries.

Secondly, we realise that the number of businesses with Belarusian capital in the EU may be higher than that calculated in the report, because our calculations do not include:

- businesses with minority shareholders being Belarusian, citizens of Belarus, or businesses registered in Belarus (this is important primarily for joint stock companies);
- businesses with indirect Belarusian beneficiaries (for example if a shareholder of an EU enterprise is a Cyprus business owned by a Belarusian citizen or company registered in Belarus);
- businesses registered by shareholders with dual citizenship, one of which is Belarusian.

We, therefore, use the wording "at least" to show that the number of Belarusian companies in the EU and the jobs they have created reflects those we can be sure of.

Thirdly, when estimating the number of businesses with Belarusian capital in the EU and the number of jobs created by them (Section 2), we assumed that the share of EU countries other than Poland, Estonia, Lithuania and Latvia in the total number of Belarusian businesses in the EU is equal to the other countries' share in the total number of Belarusian immigrants in the EU. We used Eurostat's data for first resident permits in the EU for 2020–2023 as a proxy of the total number of Belarusian immigrants in EU countries, and used this proxy to estimate the share of "other EU countries" (other than Poland, Estonia, Lithuania and Latvia) in the total number of businesses with Belarusian capital in the EU.

The report is based on statistical data analysis and the results of quantitative surveys of Belarusians and Belarusian businesses in the EU conducted in 2023–2024 (described below).

The statistical data for Section 2, Section 3, and Section 4 come from five sources:

i) open official data from national authorities' and governmental institutions' websites;
ii) data requested from national authorities via email and data from the presentation of the Vice Minister of Economy of Lithuania at the Belarusian Business Forum in Vilnius on 26 April 2023;
iii) data from public sources of information (research institutions, open data platforms, media);
iv) Eurostat data on first residence permits for Belarusian citizens granted by the EU countries;
v) data on key economic indicators of firms with Belarusian beneficiaries in Poland (obtained via Centralny Ośrodek Informacji Gospodarczej[27]), Lithuania, Latvia, and Estonia (for all three countries, data were obtained via the open data platform Okredo[28]).

[27] www.coig.com.pl
[28] www.okredo.com

The report uses the results of two surveys conducted in 2023 and 2024. The analysis of businesses' needs and Belarusian identity in Section 2 is based on the results of the survey of businesses with Belarusian capital in the EU conducted in February–March 2024 by ABBA and CASE. 125 Belarusian owners of businesses in the EU were surveyed and a focus group was conducted with 5 owners. The sample profile was as follows: 74% of the respondents were from Poland, 19% from Lithuania, and 11% from other EU countries, representing 15 different sectors of the economy. The share of micro enterprises in the survey was 87% (up to 9 employees), 10% were small businesses (10–49 employees), while 3% of the businesses surveyed belonged to the cluster of medium-sized enterprises (employing 50–249 employees).[29] Male respondents made up 71% of the owners surveyed, and 73% of all respondents had a higher education diploma.

The analysis of entrepreneurial potential in Section 3 is based on the results of the survey of the Belarusian diaspora in Poland, Lithuania, Georgia and Germany. The survey was conducted on 19–26 February 2023 by ABBA and the Center for New Ideas. In total, 604 people were surveyed; 76% had left Belarus in 2020 or later; 59% were men; average age was 36; 87% held higher or postgraduate education; and 46% lived in Poland, 10% – in Lithuania, 8% – in Georgia, and 7% – in Germany.

[29] This was close to the SME distribution in the EU in general: 98.9% of EU firms are micro and small enterprises, 0.9% are medium-sized enterprises, 0.2% are large enterprises (≥250 persons). Source: https://ec.europa.eu/eurostat/web/products-eurostat-news/-/edn-20220627-1.