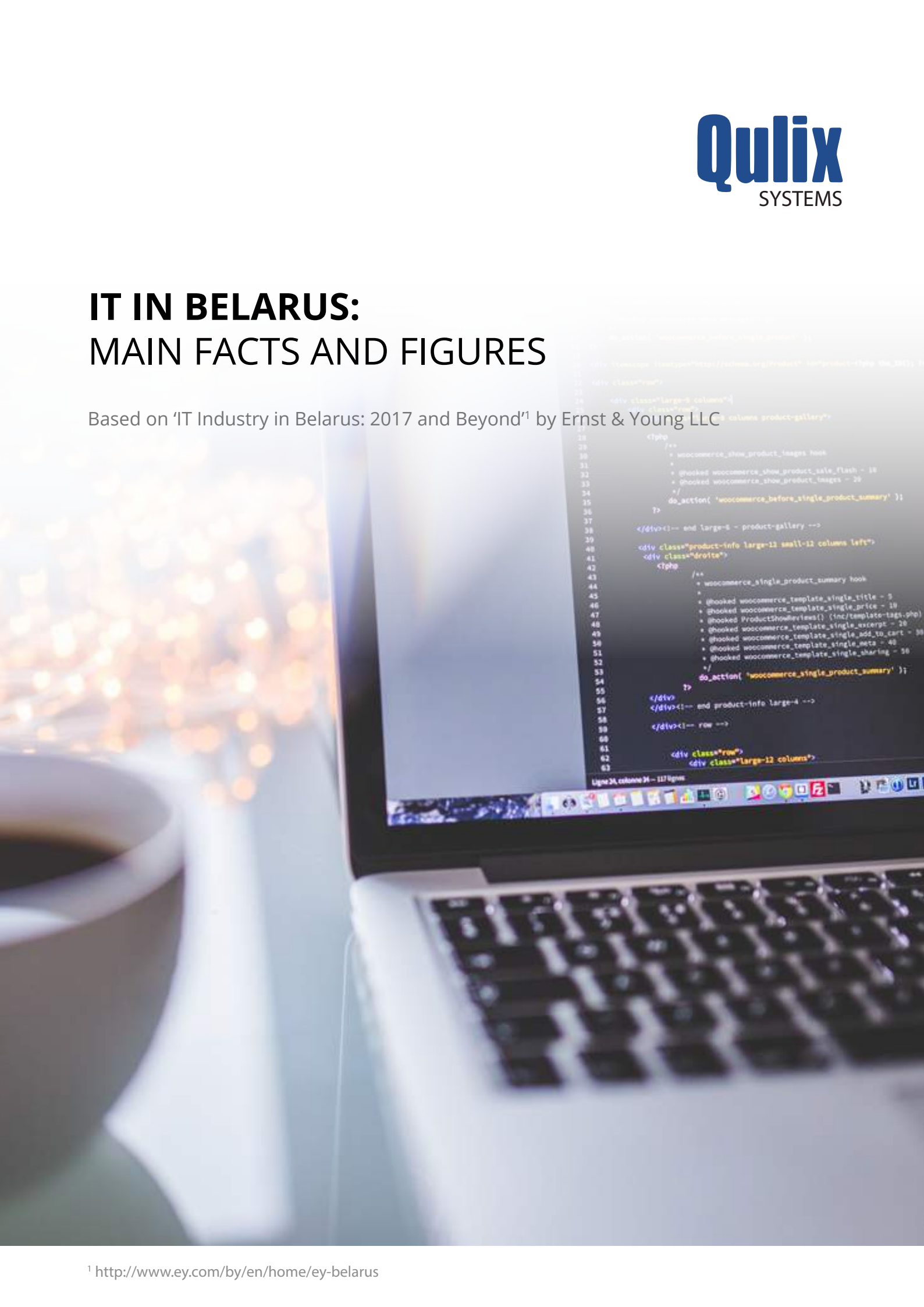


# IT IN BELARUS: MAIN FACTS AND FIGURES

Based on 'IT Industry in Belarus: 2017 and Beyond'<sup>1</sup> by Ernst & Young LLC



<sup>1</sup> <http://www.ey.com/by/en/home/ey-belarus>

## Introduction

The global issue of digitization already demands that we think beyond the boundaries.

The IT industry in Belarus has been growing significantly in the recent years and has conquered a primary role in the country's economy.

In the last years, the number of companies with an office/development center in Belarus has been continuously increased.

Belarusian IT industry is frequently mentioned by prominent international media. Belarusian IT companies are regularly included in global ratings.

The recently published report of EY provides the most important information on the country and its IT industry giving an idea about Belarus potential as a promising location for business. The most interesting facts and figures are summarized below.

### 1

## Overview

### BELARUS

9.5

million population in 2017

80+

countries' citizens allowed  
visa-free entry

37<sup>th</sup>

place out of 190 for  
Belarus in the World Bank  
Doing Business 2017

48.3%

share of services in GDP,  
2016

### ICT SECTOR

85,000

employed in ICT sector,  
2016

5.1%

share of ICT sector in  
GDP, 2016

2.2%

share of ICT sector in total  
employment, 2016

USD 1.4<sup>b</sup>

foreign investment in ICT  
sector, 2015

### IT PRODUCTS AND SERVICES

34,000

employed in IT products  
and services, 2015

USD 1<sup>b</sup>

revenue from IT products  
and services, 2015

25%

share of IT products and  
services in ICT sector  
revenue, 2016

15.9%

CAGR of IT products and  
services revenue,  
2011-2015

## COMPUTER SERVICES EXPORTS

**USD 956.8m**

computer services exports, 2016

**USD 100**

computer services exports per capita, 2016

**30**

times increase in share of computer services in total exports, 2005-2016

**28.4%**

CAGR of computer services exports, 2011-2016

## HI-TECH PARK

**181**

Hi-Tech Park resident companies, 2017

**30,000+**

Hi-Tech Park residents' headcount, 2017

**85%**

share of Hi-Tech Park residents' exports in computer services exports, 2016

**30**

times growth in computer services exports since Hi-Tech Park creation, 2005-2016

## HTP RESIDENTS

**>30%**

of Fortune 200 have worked with HTP residents

**8.000+**

are employed in the EPAM Systems development center in Belarus

**69%**

of HTP residents are engaged in IT services outsourcing

**55%**

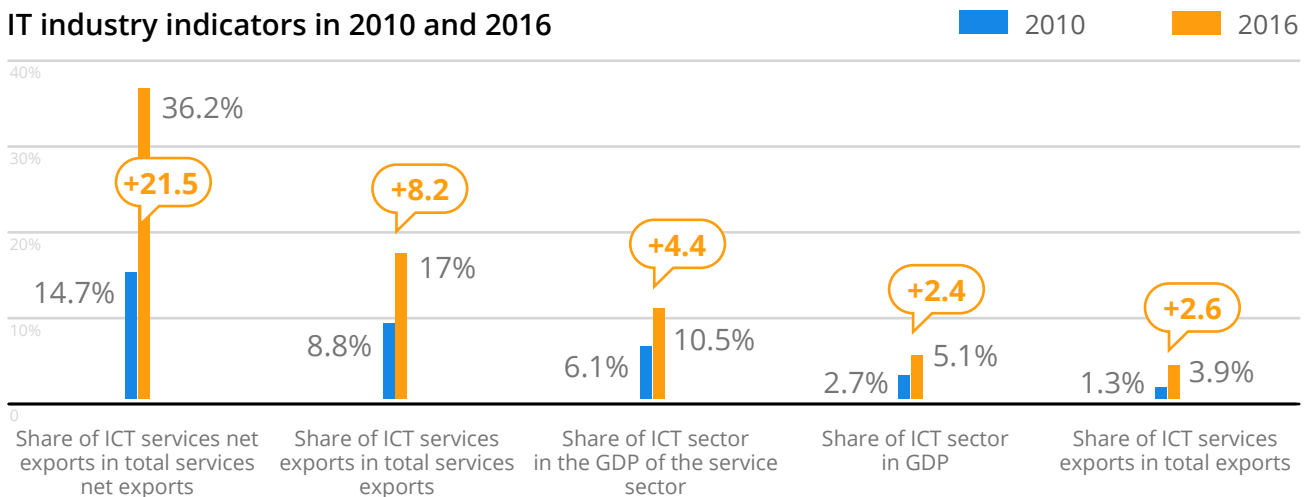
of HTP residents are under foreign or joint ownership, 2017

# 2

## The role of IT industry in Belarus

*"Belarus's IT industry is conspicuous among other sectors for its steadily growing revenues, exports, workforce and other indicators. Exports of IT services more than quadrupled in 2010-16."*

IT industry indicators in 2010 and 2016



### IT in Belarus: Main Facts and Figures

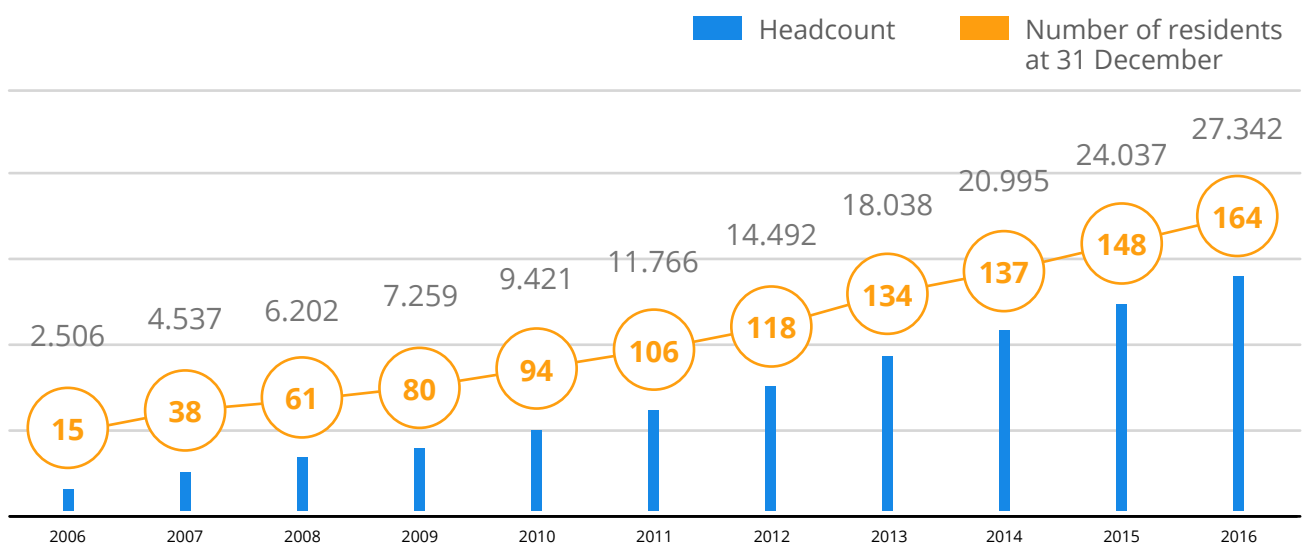
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## Business of Hi-Tech Park residents

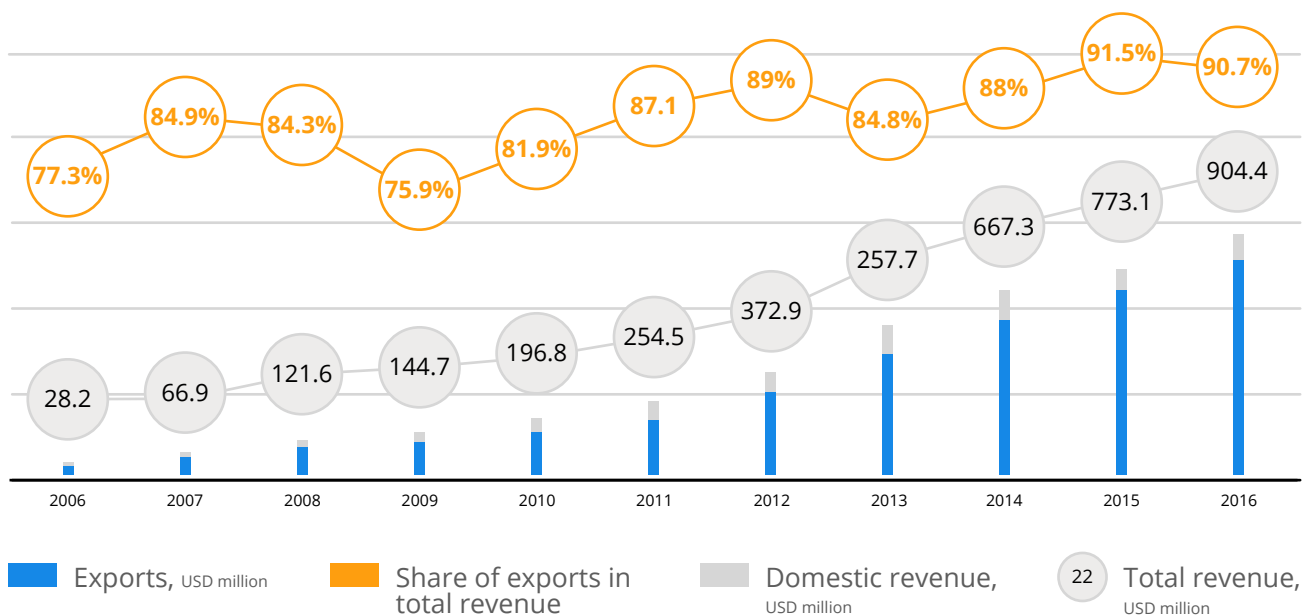
The Hi-Tech Park established in 2006 provides a special regime for IT companies.

*"Resident companies enjoy important government support; they are exempted from most taxes, incl. value-added tax and income tax, and the employees of the resident companies enjoy personal income tax reduced by 30% compared to other sectors."*

### HTP residents growth



### Share of exports in total revenue of HTP residents

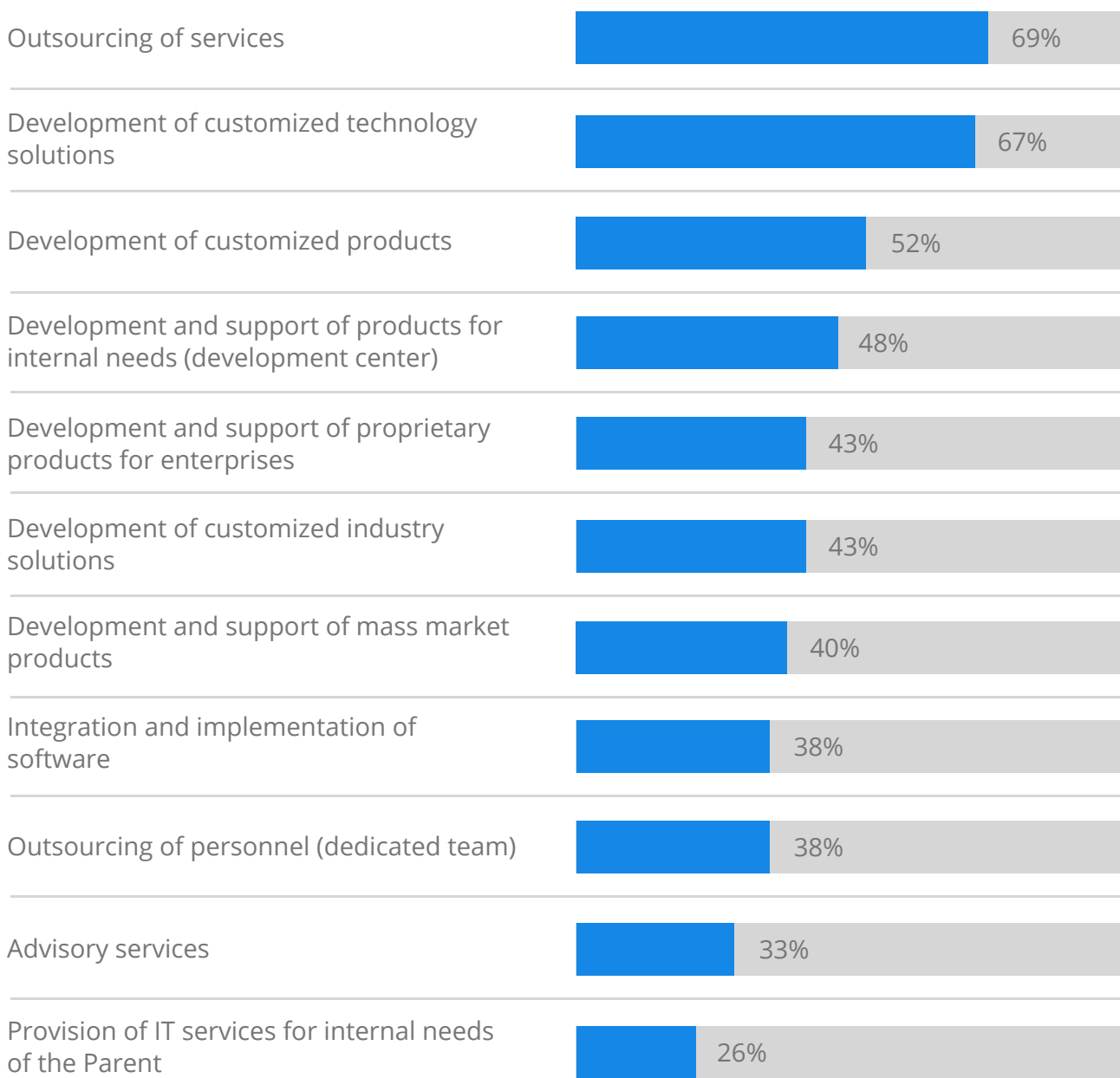


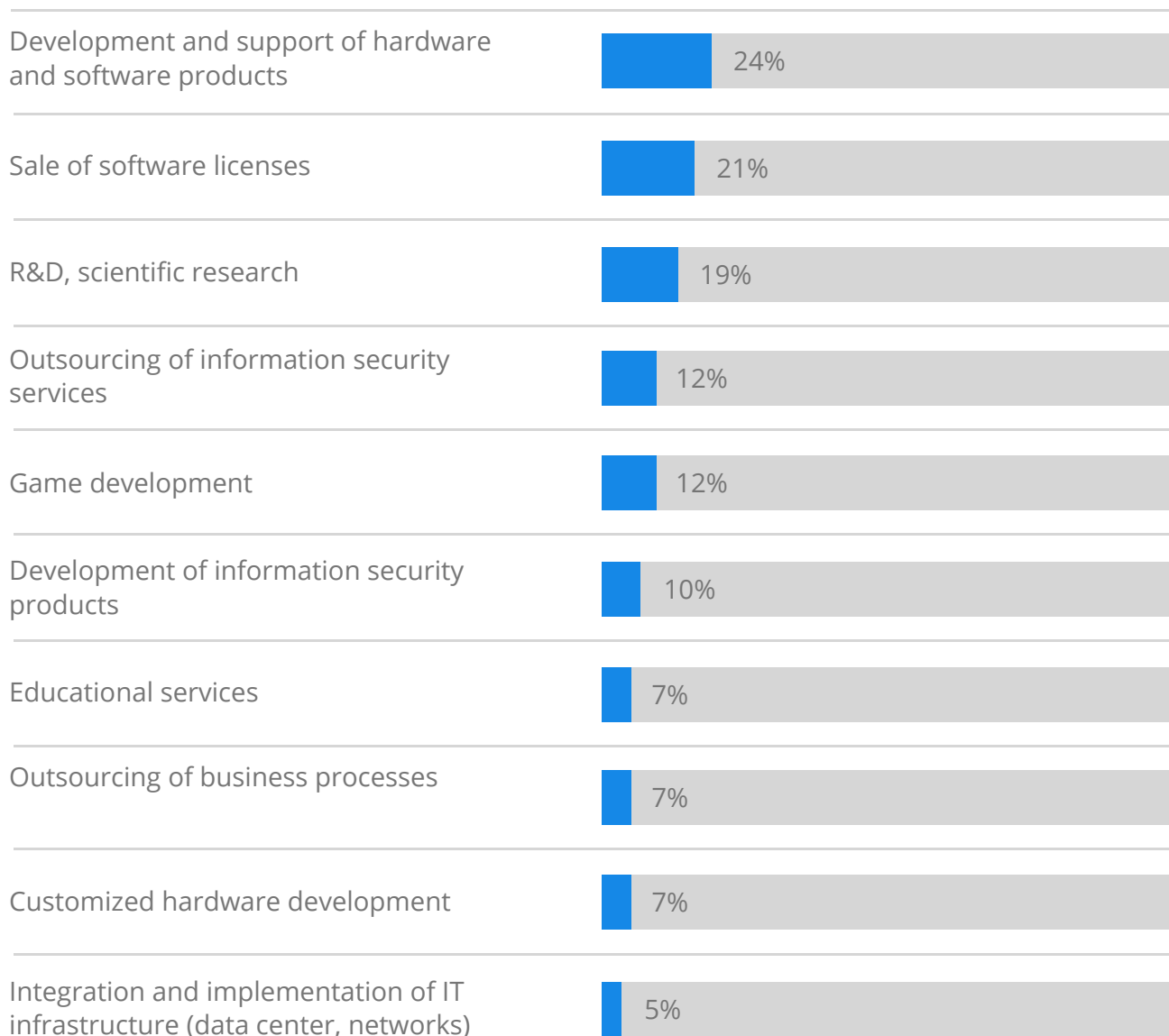
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## Business lines of HTP residents

*“More than half of respondents (69%) noted that IT services outsourcing is their prevailing business line. [...] 67% of companies are engaged in the development of customized technical solutions, 52% develop customized products, and 43% develop customized industry solutions.”*

### Business lines of HTP residents





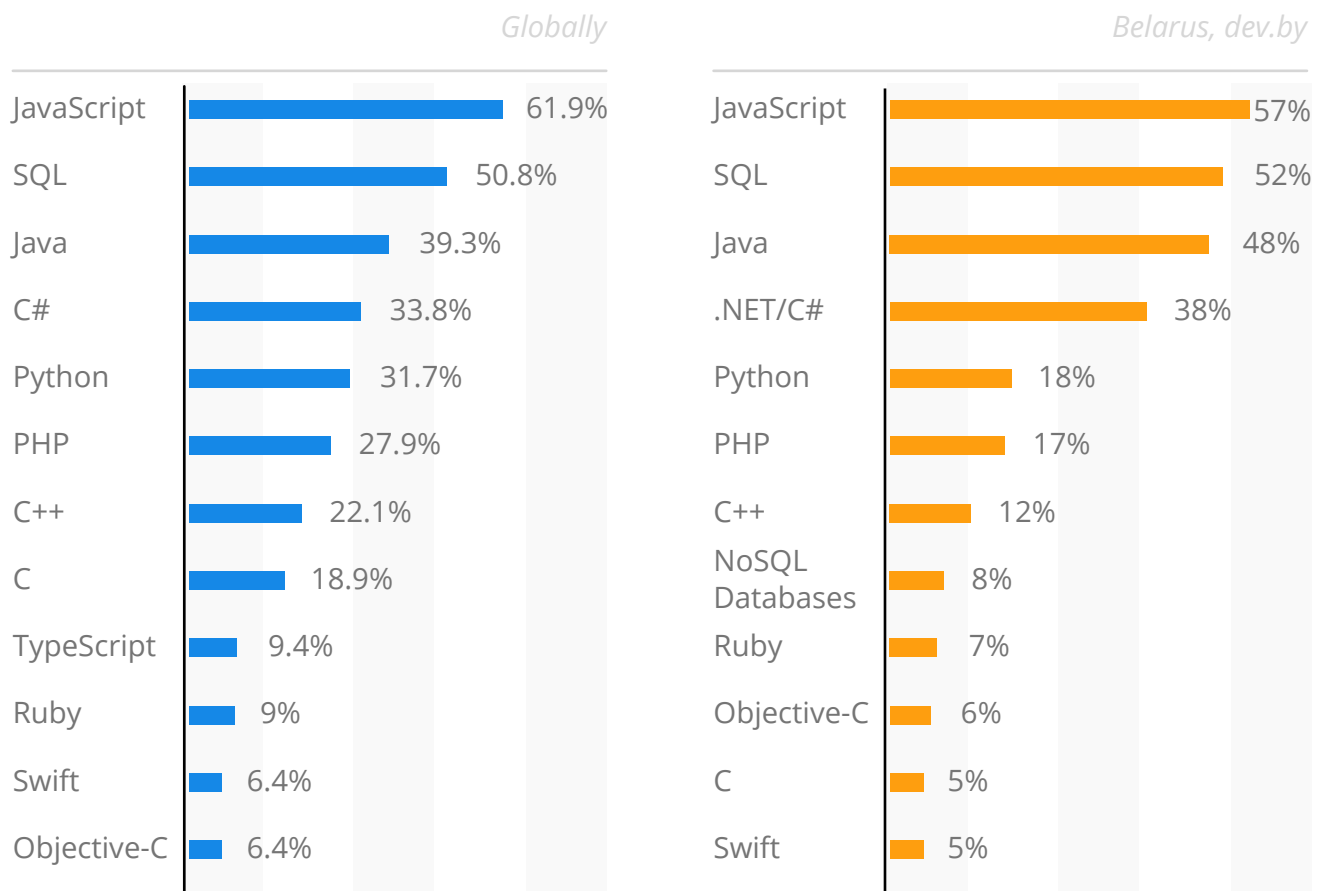
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### Belarusian IT labor market

*"The Belarusian IT industry is notable for a high percentage of employees with high education (some 76%)."*

*"The most popular programming languages are Javascript (57% of those surveyed), SQL (52%), Java (48%), .NET/C# (38%) and Python (18%). The distribution is in line with world trends: the three most popular languages – Javascript, SQL and Java – are the same."*

## Distribution by main programming language, 2016



## 6

### Sales geography

*"Despite bigger export volumes to Western Europe (49%), the USA is the most popular HTP export destination: in 2016, exports to the USA totaled USD 353.7 million, or 43% of the total, while exports to Western Europe are distributed among a number of countries, with the largest being the UK and Germany."*

#### Sales by country, USD million

	Country	2016	Share, %
1	USA	353.7	43.1
2	UK	63.9	7.8

	Country	2016	Share, %
3	Germany	41.4	5.0
4	Russia	41.3	5.0

	Country	2016	Share,%
5	Ireland	25.4	3.1
6	Netherlands	17.1	2.1
7	Luxembourg	12.6	1.5
8	Switzerland	11.5	1.4
9	Finland	10.1	1.2
10	Czech Republic	9.1	1.1

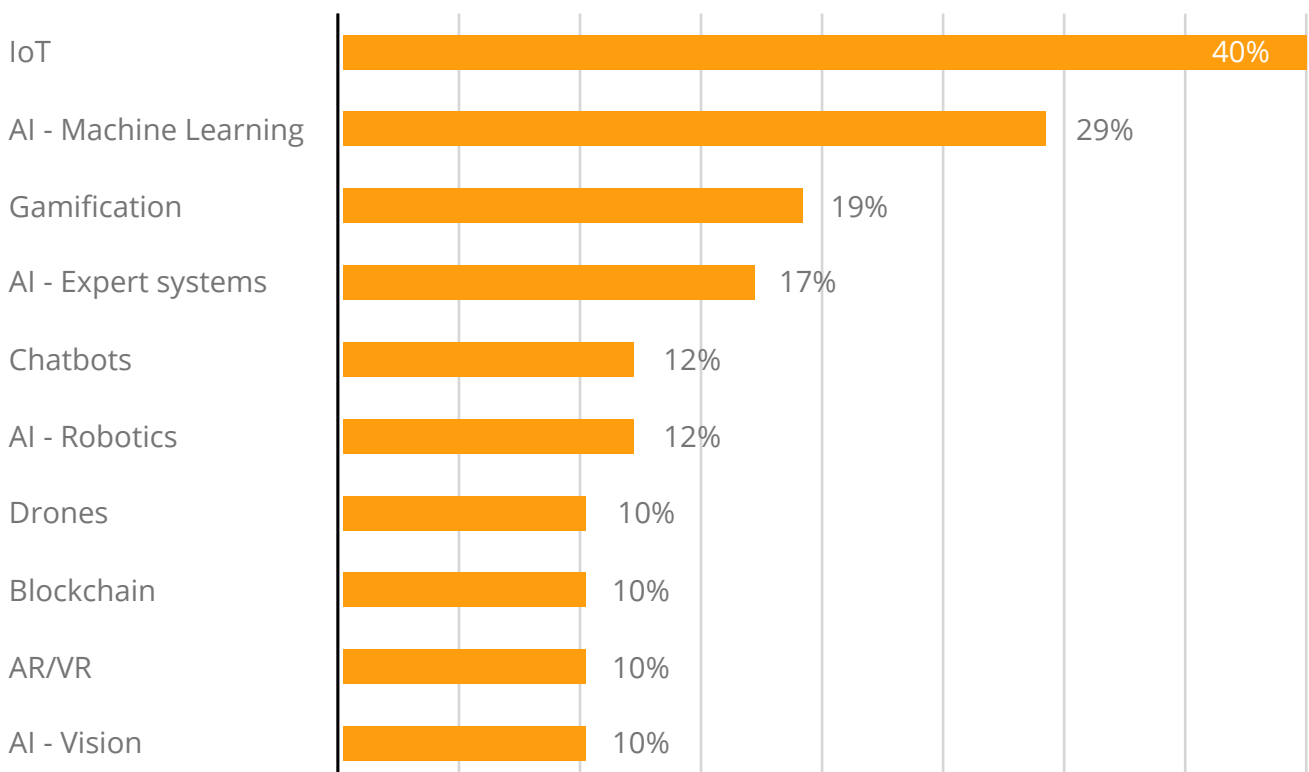
	Country	2016	Share,%
11	Israel	7.6	0.9
12	South Korea	6.6	0.8
13	Latvia	6.0	0.7
14	Sweden	5.2	0.6
15	Austria	4.0	0.5

## 6

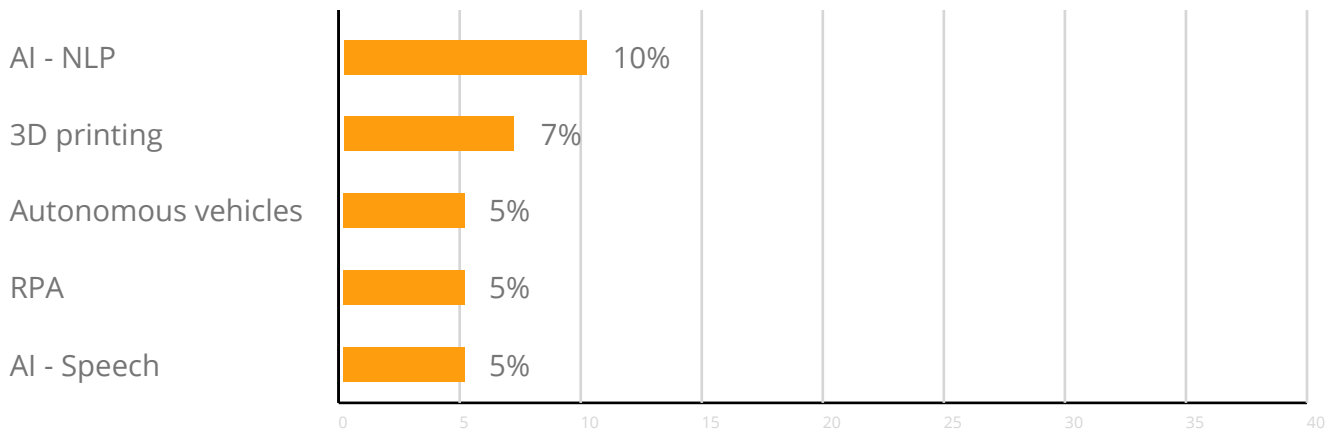
### Popularity of new technologies among Belarusian HTP companies

*"Based on analysis of new technologies, internet of things (40%), machine learning (29%) and gamification (19%) are the most common competencies for Belarusian companies."*

#### Popularity of new technologies among Belarusian HTP companies







## About Qulix

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