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**Wpływ migracji powrotnych na skłonność do przedsiębiorczości i trwałość związanej z nią
działalności przedsiębiorczej w Polsce (2007-2015)**

**The impact of return migration on entrepreneurial propensity and sustainability of related
entrepreneurial activity in Poland (2007-2015)**

Rozprawa doktorska / Doctoral dissertation

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Streszczenie

W erze globalizacji warunki, formy i wynikające z nich skutki migracji międzynarodowych nadal zmieniają się wraz z upływem czasu (Pries, 2003; King, 2013; Goździak i Pawlak, 2016). W związku z tym, prowadzone badania przyczyniają się do poprawy tradycyjnego rozumienia trwałej migracji poprzez badanie jej przez pryzmat dynamicznych zmian migracyjnych w XXI wieku (Pries, 2003). Celem niniejszej rozprawy jest pogłębienie stanu wiedzy w badaniach nad migracjami międzynarodowymi i rozwojem społeczno-gospodarczym poprzez analizę wpływu migracji powrotnych na skłonność do podjęcia działalności gospodarczej i na jej utrzymanie w czasie w kontekście gospodarki wysokorozwiniętej, wykorzystując Polskę jako studium przypadku. W szczególności skoncentrowano na aspektach międzynarodowej dobrowolnej migracji zarobkowej, rozumianej jako rodzaj mobilności, gdy jednostki przemieszczają się za granicę swobodnie, choć kierują się motywacjami ekonomicznymi, a zatem często na bardziej tymczasowych zasadach. Ponadto uwzględniono zagadnienia migracji powrotnej i wyboru zawodu przez migrantów powrotnych, po powrocie do kraju pochodzenia, np. tych mocniej związanych z przedsiębiorczością. Analiza obejmuje decydujące aspekty, takie jak indywidualna skłonność do przedsiębiorczości i kryteria długoterminowej trwałości biznesu prowadzonego przez powracającego migranta, biorąc pod uwagę na wyniki firmy i przetrwanie biznesu.

Niniejszy projekt badawczy zakłada podejście ilościowe, ponieważ pozwala na empiryczne badanie obserwowalnych dynamicznych zachowań ludzkich przy wsparciu technik statystycznych. Analiza retrospektywna opiera się na unikalnym zbiorze danych pochodzących z polskiego badania podłużnego Diagnoza Społeczna. Zbiór ten umożliwia analizę aktywności ekonomicznej i wyników przedsiębiorczości osób powracających i nie-migrantów w pięciu kolejnych falach, tj. w latach 2007, 2009, 2011, 2013, 2015. W przypadku Polski wyniki analizy empirycznej wskazują, że wpływ migracji powrotnej na skłonność do przedsiębiorczości osób fizycznych i trwałość ich przedsiębiorstw jest niewielki. Osoby powracające są bardziej skłonne do samozatrudnienia: efekt ten jest silny i znaczący przez 2, 4, a nawet 6 lat po powrocie. Prawdopodobieństwo otwarcia firmy jest wyższe w przypadku osób, które niedawno powróciły. Jednak status przedsiębiorcy nie jest skorelowany z doświadczeniem migracyjnym, podobnie jak działalność inwestycyjna poszczególnych osób. Co więcej, wskaźniki utrzymania statusu przedsiębiorcy nie różnią się statystycznie między osobami powracającymi i niebędącymi migrantami. Co więcej, ryzyko niepowodzenia biznesu i utraty funduszy inwestycyjnych jest znacznie wyższe w przypadku osób z doświadczeniem migracyjnym. Jeśli chodzi o wyniki ekonomiczne, powracający osiągają wyższe dochody niż osoby niebędące migrantami, ale status przedsiębiorcy jest całkowicie nieistotny w tym aspekcie: nie ma różnicy między dochodami powracających przedsiębiorców a dochodami powracających, którzy pracują najemnie.

Wyniki przeprowadzonych badań o charakterze teoretycznym i empirycznym stanowią wkład w dynamicznie rozwijającą się gałąź naukową w obszarze migracji międzynarodowej, a w szczególności jej wpływu na gospodarkę społeczną krajów pochodzenia (lub krajów macierzystych). Do tej pory tylko kilka innych badań wykorzystywało podłużne dane panelowe do analizy wejścia w przedsiębiorczość wśród migrantów powrotnych, a prawie żadne nie badało tego jednocześnie z utrzymaniem działań przedsiębiorczych osób powracających. Badanie pokazuje, że potencjał przedsiębiorczy osób powracających nie jest tak znaczący, jak sugerowano w literaturze ekonomicznej, przynajmniej w przypadku Polski.

Słowa kluczowe: migracja powrotna, powracający, przedsiębiorczość, przedsiębiorczość powracających, badanie podłużne, Europa Środkowo-Wschodnia, Polska

JEL: C55, F22, J15, J24, J6, L26, O15, O52, Y40

Abstract

In the era of globalization, the conditions, forms, and consequential effects of international migration continue to adapt as time progresses (Pries, 2003; King, 2013; Goździak and Pawlak, 2016). Consequently, ongoing research contributes to enhancing the classical understanding of more permanent migration by examining it through the lenses of 21st-century dynamic migration developments (Pries, 2003). The purpose of this dissertation is to provide a respective contribution to the academic literature on international migration and economic development by investigating the influence of return migration on entrepreneurial propensity and business sustainability in a developed economy, using Poland as an example. It centers around international voluntary labor migration, a type of mobility when individuals move abroad rather freely, though guided by economic motivations and therefore oftentimes on a more temporary basis. More particularly, it focusses on return migration and the occupational choice of returnees upon return to their home country, e. g. into entrepreneurship. The analysis includes decisive aspects such as individual entrepreneurial propensity and long-term sustainability of returnee business, i.e., attention on firm performance and business survival.

This research project adopts the quantitative approach as it allows to conduct empirical investigation of observable dynamic human behavior with the support of statistical techniques. Respective analysis is based on a unique data set originating from Polish longitudinal survey Social Diagnosis (Diagnoza Społeczna). This data set enables to analyze economic activity and entrepreneurial performance of returnees and non-migrants for five consecutive waves, i.e., for the years 2007, 2009, 2011, 2013, 2015. The results indicate that the impact of return migration on entrepreneurial propensity of individuals and the sustainability of their businesses is modest. Returnees are more likely to be self-employed: this effect is strong and significant for 2, 4 and even 6 years upon return. The probability of opening a business is higher for a recent returnee. Yet, the entrepreneurial status is not correlated with migration experience, nor are the investment activities of the individuals. Moreover, the survival rates for entrepreneurship status do not differ statistically between returnees and non-migrants. Moreover, the risk of business failure and loss of investment funds is significantly higher for individuals with migration experience. When it comes to economic performance, returnees exhibit higher incomes than non-migrants but the entrepreneurial status is

completely irrelevant in this aspect: there is no difference between the income of return entrepreneurs and the income of returnees in waged employment.

These findings contribute to a rapidly evolving literature on international migration and particularly to the impact on the socio-economics of origin countries (home countries). So far, only a very few other studies used longitudinal panel data to analyze the entry into entrepreneurship among return migrants, and almost none investigated it simultaneously with survival of returnees' entrepreneurial activities. The study demonstrates that the entrepreneurial potential of returnees is not as significant as suggested in the economic literature, at least for the case of Poland.

Key words: return migration, returnee, entrepreneurship, performance returnee entrepreneurship, longitudinal study, CEE, Poland

JEL: C55, F22, J15, J24, J6, L26, O15, 052, Y40

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Declaration

I, Anke Lasek, declare that this dissertation entitled “**The Influence of Return Migration on Entrepreneurial Propensity and Sustainability: Evidence from Poland (2007-2015)**” is my original research except where otherwise indicated. The thesis has not been submitted before to any university for any form of examination or qualification.

Signed:

Date:

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List of Terms and Abbreviations

A

Agency	see Human Agency
Alertness	Cognition, perception (personal characteristic/ trait)
Arbitrage	Taking advantage of price differences in different markets to gain profit, less speculative

C

CEE	Countries of Central and Eastern Europe (CEE): Bulgaria, Czech Republic, Estonia, Hungary, Lithuania, Latvia, Poland, Romania, Slovenia, Slovakia.
cf.	confer
CIS	Commonwealth of the Independent States (CIS): Armenia, Azerbaijan, Belarus, Kazakhstan, Kyrgyzstan, Moldova, Russia, Tajikistan, and Uzbekistan. Turkmenistan
Cross-sectional	Data analysis from a population at a specific point in time

D

Diaspora	People who have spread/ been dispersed from home country
Dummy Variable	Statistical binary variable that takes value of 1 or 0 where the values indicate presence or absence of something, i.e., in a regression model it is added to represent factors which are of a binary nature i.e., they are either observed or not observed.

E

Embeddedness	The dependence of a phenomenon on its environment, e.g., the functioning of an economy is not to be understood dissociated from the social world in which it is embedded (Britannica, 2022).
Entrepreneur	A person who sets up a business or businesses, taking on financial risks for profit.
Entrepreneurship	The activity of setting up a business or businesses, taking on large-scale financial risks for profit.
EU	European Union, including the countries Austria, Belgium, Bulgaria, Croatia, Republic of Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Spain and Sweden (UK until 31 st December 2020).
EU-8	Countries joined the EU, 1 Jan 2004: Czech Republic, Estonia, Hungary, Latvia, Lithuania, Poland, Slovakia, Slovenia

F

FDI	Foreign Direct Investment; ownership stake in a foreign company made by e.g., an investor or company from abroad.
FTSE Russell Index	The FTSE Developed All Cap Index is a market-capitalization weighted index representing the performance of large, mid, or small cap stocks in developed markets and is suitable

		as the basis for investment products, such as funds, derivatives and exchange-traded funds, www.ftserussell.com
G	GDP	Gross Domestic Product; it is a measure of financial outcome of products and services in a given country/ economy and for a given period time, usually p.a.
H	Home country	The country where one was born or lives (more) permanently; country of migration origin.
	Host Country	The country to which an immigrant has come to; country of migration destination.
	Human Agency	A person's capacity to act independently and to make own free choices.
I	ICCPR	The International Covenant on Civil and Political Rights, 1966, esp. Art. 12.
	ICESCR	The International Covenant on Economic, Social and Cultural Rights
	ILO	International Labour Organization, a tripartite UN agency that develops standards to labor, policies, and programs.
	International Entrepreneurship	Applicable to non-migrants and to migrants, it encompasses the discovery, enactment, evaluation, and exploitation of opportunities – across national borders – to create future goods and services (Malerba and Ferreira, 2020).
	International Migration Innovation	Physical move of person(s) across an international border(s). Reference to something new or to a change made to an existing product or idea.
	Immigrant	Incoming Migrant, from host country perspective.
	IOM	International Organization for Migration, a UN agency that provides services and aid concerning migration to governments and migrants (www.IOM.com).
L	Labor market	Economic mechanism which regulates the size of the labour supply and demand. It is in state of equilibrium when supply and demand are balanced which occurs at a certain level of real wages. If, however, the labour supply exceeds demand, unemployment occurs. The market is determined by socio-demographic and economic factors (Kłosowski, 2014).
	Lagged dummy variable	Statistical variable based on past values of the time series, i.e., value of the dependent variable depends on past values.
	Liability of	Differentiating factor between involved units of analysis, concept is associated with bearing cost (liability); i.e., liability of foreignness is associated with social cost of doing business at the host country in form of unfamiliarity, discrimination etc. (Gurău et al., 2020).

	Longitudinal	Repeated observation of same variables (population) over long periods of time, accurate in describing individual trajectories.
M	Macro	Large scale, overall
	Mainstream	Vast majority, mass related
	Micro	Smaller than normal
	Middle income trap	Phenomenon of hitherto rapidly growing economies stagnating at middle-income levels and failing to graduate into the ranks of high-income countries (Åslund, 2018).
	Migrant	The person that physically migrates.
	Migration	Spatial mobility in a particular meaning (Okólski,2012).
	Migration hump	Growing per capita income is accompanied by improved levels of education but also less available jobs for the educated people which causes higher emigration rates; falling emigration rates occur when economic development has improved making emigration less favorable to them, despite migration desire (Martin-Shields et al., 2017).
	Migration trap	Educated migrants obtain qualification to work abroad but cannot leave due to labor demand or changing immigration policies (Ortiga, 2018).
	Modernization	A process of societal change that leads to the creation of a new, 'different' society (Okólski, 2012).
N	Nano	Very small
	Nascent	Arising, evolving, emerging
	Natives	In the sense of locals, non-migrants
	NE	Neoclassical Economics, theoretical approach to migration
	NELM	New Economics of Labor Migration, theoretical approach to migration
O	OECD	Organization for Economic Cooperation and Development
P	p.a.	per annum
	p.m.	per month
	Panel Data	Large content surveys repeatedly cover the same sample over stretches of time (longitudinal data).
	Persona	Technique/ model to describe, understand or clarify behavioral patterns and achievements of a group of similar persons (Chang et al., 2008).
	Propensity	Tendency towards a certain behavior
	Purchasing power parity	Comparison of economic productivity and standard of living between countries, or what currencies can buy there.
R	Regression analysis	Statistical method that converts large data set information (data) into knowledge through establishing the (significance

		of) the relationship between variables, i.e., the dependent variable Y and the independent variable(s) X, which then enables the researcher to further forecast unobserved values.
	Reintegration	The process of re-inclusion someone back into home society
	Remittances	Sum of money sent from abroad to home country
	Returnee	The person who undertakes return migration
	Return migration	Physical move(s) of person(s) back to the home country
	R&D	Research and Development
S		
	SD	Social Diagnosis is a project to support diagnostical work with detailed data derived from institutional indicators concerning Polish households and attitudes, mind-sets and behaviors of their members; it is a diagnosis of the conditions and quality of life of the Poles as they report it. (http://www.diagnoza.com/index-en.html)
	Self-Employment	The state of working for oneself as a freelance or the owner of a business rather than for an employer under fixed wage.
	SME	Small and Medium Enterprises (https://single-market-economy.ec.europa.eu/smes/sme-definition_en).
	SME United	The association of crafts and SMEs in Europe; a recognized employers' organization and European Social Partner and acts on behalf of crafts and SMEs in the European Social Dialogue and in discussions with the EU institutions.
	Speculation	Buying assets for selling in the future at higher value, based on assumption and including higher risk than arbitrage.
T		
	Transition	Process an economy undergoes on restructuring (transformation) towards advanced market-based economy from i.e., a formerly centrally planned economy (Aidis, 2005).
	Transitional economies	The following economies have been considered at some point in time: Albania, Bulgaria, Croatia, Czech Republic, FYR Macedonia, Hungary, Poland, Romania, Slovakia, Slovenia; Estonia, Latvia, Lithuania; Bosnia and Herzegovina, Federal Republic of Yugoslavia, Serbia, Montenegro, and, at least de facto, Kosovo; Armenia, Azerbaijan, Belarus, Georgia, Kazakhstan, Kyrgyzstan, Moldova, Russia, Tajikistan, Turkmenistan, Ukraine, Uzbekistan, but also in (Soviet) Asia Cambodia, China, Laos, Vietnam (Manev and Manolova, 2010; Dallago, 2017).
	Transnationalism	Economic, political, and cultural processes that extend beyond the boundaries of nation-states, theoretical approach to international migration.
	Transnational capital	Value added to human capital from migration experience: foreign knowledge, technology etc.
U		
	UN	The United Nations

UNECE	United Nations Economic Commission for Europe, Information Service, Geneva/ Switzerland
UDHR	The Universal Declaration of Human Rights, 1948; Art. 1
UNDESA	United Nations Department of Economic and Social Affairs
UK	The United Kingdom of Great Britain and Northern Ireland
USD	US Dollar
V	V4, Visegrad Four Group The countries Poland, Czech Republic, Slovakia, Hungary

1 Introduction

1.1 Research gap, research problem formulation and research design

Burgeoning studies on international migration and socio-economic development (Pisarevskaya et al., 2020) turn increasing attention to return migration and development, including occupational choices such as entrepreneurial activities (Naudé et al., 2017). This phenomena is attributed to a set of reasons. First, in many cases immigrants seem to be more entrepreneurial in the host countries than non-migrants (Constant and Zimmermann, 2004; Desiderio and Salt, 2010; Vendor and Franke, 2016). This can be explained by the fact that migrants who have self-selected into migration are more willing to take risks and deal with uncertainty than those who choose not to move. Entrepreneurs typically exhibit a higher propensity for risk-taking compared to wage employees. Therefore, “immigrants have the relevant personal features and tend to become entrepreneurs” (Kushnirovich et al., 2017: 4). Secondly, their entrepreneurial activities generate positive spillover effects both in their home and host country economies (Kemeny and Cooke, 2018; Olney, 2013; Kusek, 2020). Third, returnees should be able to effectively capitalize their lifetime experience, including from migration (Vārpiņa et al., 2023), and this perception positions them as key agents of innovative change in their home countries (Dustmann et al., 2; Wahba, 2014; Wahba, 2015a; Mahé, 2018; Jephcote et al., 2022). Fourth, returnee entrepreneurs can be more innovative than non-migrants when maintaining transnational ties and social networks (Sinatti, 2022).

Studies on return migration show that returnees more frequently prefer to start their own businesses than non-migrants (McCormick and Wahba, 2001; Piracha and Vedean, 2010; Thomas and Inkpen, 2013; Ndreka, 2019), especially the longer they stayed abroad (Bensassi and Jabbour, 2017; Debnath, 2016). However, this is not always the case (Borodak and Piracha, 2010; Gibson and Mckenzie, 2012; Brück et al., 2018). Further studies show that the level of savings along with migration skill acquisition are decisive in the occupational choice upon return (Wahba, 2014; Bensassi and Jabbour, 2021; Debnath, 2016; Black and Castaldo, 2009; Hamdouch and Wahba, 2015). However, this manifestation is more evident in the form of individual self-employment than enterprise entrepreneurship due to manageable risks and lower entry barriers (Debnath, 2016). Furthermore, most studies that analyze return entrepreneurship focus on developing or emerging

economies as home countries of migrants (McCormick and Whaba 2001 and 2004; Piracha and Vadean, 2010; King, 2017, Fouda, 2021). From the perspective of this thesis, this is an obvious research gap as there are very few studies that investigate entrepreneurial activities of returnees in developed economies (Wahba, 2015a), albeit in such countries the scope of return migration could be substantial (Brzozowski et al., 2014).

Whether individual business in general or returnees in particular sustain their entrepreneurial activities over time has also received little attention (van Stel et al., 2014; Brück et al., 2018). Therefore, knowledge on survival rates of firms created by return migrants and their performance compared to non-migrant businesses remains as well limited due to data scarcity: most studies rely on cross-sectional studies (Brzozowski and Coniglio, 2016) preventing scholars from conducting dynamic analyses of entrepreneurial performance. One rare exception in this aspect is the study of Marchetta (2012) in which the author compares survival rates of returnees to Egypt based on two rounds of ELMPS survey in 1998 and 2006. This study finds that migration experience substantially enhances the survival rate of entrepreneurial activity of an individual (Marchetta, 2012). Yet, this evidence comes from only one and quite specific developing economy, with limited possibilities to generalize the results for other countries. Consequently, there is a need to carry out more dynamic analyses using longitudinal panel data for tracking business evolution created by returnees compared to non-migrants in other geographical locations.

Given these aforementioned research gaps, Poland emerges as a particularly interesting case for analysis. First, since 2004, the country was still one of the most important emigration countries within the EU, as at times more than 2 million Poles have lived outside Poland (Okólski and Wach, 2020). Following the EU accession in 2004, Polish citizens increasingly left to Western economies for economic reasons (Heffner and Solga, 2014) and had – at least initially - return plans. Second, the Polish transformation as of the 1990s has contributed to a lasting high entrepreneurial spirit causing self-employment rates to rise above EU average (17.4 percent in Poland vs. 13.7 percent EU average; cf. OECD, 2018: 9; similar Piatkowski, 2021). Entrepreneurial activity may also arise from return migration as for example an increasing number of Polish emigrants are returning to Poland to open businesses in Poland (Kusek, 2020: 470). Third, Poland experienced significant economic growth after 2004, and through continued institutionalizing (Piatkowski, 2021), policy development attracted substantial waves of return migrants, approximately 580,000 returnees

between 2004 and 2008 alone (Anacka and Fihel, 2012). The majority of these returnees were highly educated and in working age, representing significant economic activity potential for the Polish labor market (Smoliner et al., 2013). Through implementing institutional reforms, Poland has developed to the most successful CEE and V4 countries in fostering new private firms, and thus has become one of the most studied economies among the CEE economies in this aspect (Manev and Manolova, 2010; Ahmadov, 2020). Fourth, returning from developed countries to a developed economy of the CEE region deviates from traditional migration flows (i.e., South – North, East – West) by enhancing the North-North direction (Brzozowski, 2017). This rather new direction opens new research perspective on return migration which so far has been investigated only to limited extent, except for Romanian return entrepreneurs (Croitoru, 2020). Fifth, the sources of data concerning migration phenomenon are rather numerous, including longitudinal panel datasets like the Polish Social Diagnosis (Diagnoza Społeczna, henceforth: SD, see Czapiński and Panek, 2015; appendix XIII). Taking advantage of SD offers to exploit a broader set of dimensions of return entrepreneurship than in previous studies, ranging from traditional self-employment to entrepreneurial status, opening a business up to investment activities. Furthermore, the available SD allows the analysis of economic performance of returnees and non-migrants for five consecutive waves of 2007, 2009, 2011, 2013 and 2015 (Czapiński and Panek, 2015). Poland is therefore an obvious candidate for such a study due to its magnitudes of migration experience, re-emigration flows and substantial economic development since the 1990ies.

Respectively, **the chief aim of this research project is to contribute to the study of entrepreneurship in the context of return migration, and in doing so, to fill a respective gap in the academic literature. Specifically, this thesis investigates the economic impact of voluntary return migration on entrepreneurial propensity and the sustainability of entrepreneurial activities upon return to a developed economy, using Poland as an example.** A unique harmonized SD panel data for the period of 2007 to 2015 constitute *novelty* results for further research.

Accordingly, a **Polish returnee** is defined as an individual who had emigrated for work purposes for at least 3 consecutive months and was residing back in Poland at the time of the survey, a definition already applied in previous quantitative studies on Polish return migration (cf. Brzozowski and Coniglio, 2016: 2).

For further clarification, the following research questions and hypotheses are formulated and tested in the empirical section by applying respective econometric models.

Research question 1: To which extent return migrants enter into entrepreneurial activities upon remigration?

Research question 2: In what way do survival rates of enterprises founded by returnees differ from the firms started by non-migrants?

Research question 3: To which extend do these entrepreneurial activities generate a sustained economic growth?

H1: Return migrants exhibit higher entrepreneurial propensity than individuals without migration experience.

H2: Enterprises started by return migrants have higher survival rates than enterprises started by individuals without migration experience.

H3: Return migrant entrepreneurs attain higher income than entrepreneurs without migration experience.

To verify the research hypotheses, **three equations** are estimated with statistical methods:

1. Entrepreneurial propensity equation (probability of starting a business by an individual)
2. Entrepreneurial survival (survival rates of the enterprises founded by individuals)
3. Income equation (economic performance of individuals, including entrepreneurs)

Table 1: Overview to research design

	1 st Equation	2 nd Equation	3 rd Equation
Investigation	Entrepreneurial propensity	Survival of returnee business	Entrepreneurial performance
Dependent variable (set of), $Y_{i,j,t}$	Entrepreneurship (1=entrepreneur, 0 otherwise)	Entrepreneurship (1,0)	Economic Performance (ln of income, lost money)
Independent variable (set of), $X_{i,j,t}$	Return migration status (1,0)	Failure / Stop business (1, 0); Return migration status (1,0); Businessman status (1,0); Interaction	Return migration status (1,0); Entrepreneurship (1,0); interaction
Controls	e. g., age, gender, educational level, household size, and geographies		
Econometric analysis	Panel Logistic Regression with random effects	Random-effects Weibull proportional hazard regression	Panel Regression with random effects (Y continuous variable); Logistic Regression with random effects

Source: own elaboration

1.2 Structure of the dissertation

This dissertation divides into 5 chapters. Following the above introductory chapter 1, chapter 2 discusses theories and theoretical approaches to volunteer international migration for strategic reasons¹ and its return migration.

In chapter 3, the topic expands by the context of entrepreneurship, spanning from general, to immigrant and to returnee entrepreneurship. This is necessary because there is a lack of a single related economic theory that explains the influence of return migration on entrepreneurial propensity and returnee business sustainability to a given home country's economy.

Chapter 4 focusses on explaining the propensity into and the sustainability of returnee entrepreneurship for the case of Poland. To understand current Polish return migration and related entrepreneurial behavior, it is necessary to review their developments in historical perspective which concerns the times of partitions as of 1772 to the EU accession in 2004, and the times as of 2004 to current times, as especially the EU accession impacted Polish migration behavior sustainably.

Chapter 5 provides for the empirical analysis by introducing materials and methods. The findings of statistical enquiry will be discussed. To do so, large-scale longitudinal survey data is processed, unlike to many existing studies that are based on case studies or cross-sectional research design.

Chapter 6 summarizes the undertaking, outlines its limitations, and provides outlook and suggestions on further research.

¹ There are four main types of international migration: 1) Labor, 2) Return, 3) Chain, and 4) Asylum migration (Wickramasekara and Wimalaratana, 2019:16); there is also internal or regional migration within a geographical border (domestic migration). This dissertation looks at international *volunteer* labor return migration, though the motivation and intentions may not always be as freely made as the term itself would suggest because finding labor opportunities elsewhere may have been borne out of basic survival pressure (King, 2002: 92; King 2013: 8).

2 Theoretical aspects on international and return migration

Clearly defining terms and concepts holds significance as it establishes the scholarly context for examining the phenomenon under analysis. This not only delineates theoretical approaches and their alignment with existing secondary sources but also generates fresh avenues of information for subsequent academic scrutiny, thus enriching scholarly analysis (Guerrero and Wanjiru, 2021).

The following theoretical analysis outlines theories and theoretical approaches that explain international and return migration phenomena: 1) defining respective key terms and concepts and 2) discussing related labor migration theories, concepts and approaches.

2.1 Definition of key terms and concepts

2.1.1 International migration

Return migration invariably follows prior emigration. Derived from Latin, migration means moving from one place to another (Marks–Bielska et al., 2015). It is distinct from colonizing neighboring territories (Zybrzycki, 1956). Furthermore, migration is distinct from mobility: mobility is the general term for movements of the production factor of labor from one region to another whereas the actual spatial movement of that labor with a simultaneous change of residence is deemed to be migration (cf. Tassinopoulos et al, 1998: 6; similar Blunt, 2007, Geddes et al., 2020). Migration, moreover, is a generic term that covers different types of these people movements, depending on influencing push and pull factors (Garcia-Zamor, 2018; Tataru, 2019).

Kok (1999) defines migration as the crossing of a boundary of a predefined spatial unit by one or more persons involved in a change of residence. Boyle (2009) defines migration as process over a person's life course rather than an isolated discrete life event, and that it is connected to a relatively permanent movement of individuals, families, and groups to a more distant new geographical location. Isaac (2013) adds the intention of a lasting change in residency. Marks-Bielska et al. (2015) refer to migration as the physical movement of people across borders. Bite et al. (2020) define migration as an individual's response to changes in living conditions caused by e.g.,

formation of countries. The Oxford Dictionary (2023) defines migration as the movement of people to a new country or area in order to find work or better living conditions. Specifically, temporary migration is understood as staying in a host country for only a certain time with that period chosen by the individual(s) on personal circumstances, influenced e.g., by economic development of the home and host countries (Dustmann, 2000).

From international law perspective, international migration is linked to a person's basic right to move across borders and to re-enter the home country (legal acts: ICCPR, ICESCR, UDHR), with the entry conditions into another country depending on country-specific laws and regulations (Schindlmayr, 2003; Martin, 2005). The UN defines international migration as a physical move to a country other than that of usual residence for a period of at least 12 months with the country of destination effectively becoming the new country of usual residence (IOM, 2003, 296; Marks-Bielska et al., 2015). Reflecting contemporary dynamism with regards to migration developments, the OECD (2022) refers to all movements of people into (immigration) or out of (emigration) a specific country or countries, independently of duration or reason.

How migration is defined stipulate its measurement in time and space (Skeldon, 2017). Time settings as the 12-month period for qualifying as migration movements originate from statistical capturing of population changes that have over time been collected once a year by standard (Nowok and Willekens, 2010; similar King, 2013). Therefore, those who stayed for one year are statistically accounted for and those who were absent are not (IOM, 2003; Gans and Glorius, 2014), distinguishing migrants also from tourists etc. (Batistella, 2018; Treibel, 2008). In recognition of dynamic migration developments towards less permanent settlement, a time threshold migration period of at least three months has been introduced, as three months represent a period of lifted visa restrictions for many countries (IOM, 2008). However, this threshold is not applied consistently by all countries which, in return, hinders comparability of national statistics on international migrant numbers (IOM, 2019a; Nowok and Willekens, 2010; Marks-Bielska et al., 2015). Some scholars call for discarding time thresholds as these seem inappropriate to the development of more dynamic types of migration (Marks-Bielska et al., 2015).

Depending on the motive for migration, the individuals are mainly either volunteer movers (labor migrants) or involuntary movers (displaced persons or refugees), the two main dominant groups of humans in today's international migration (Dustmann and Weiss, 2007; Garcia-Zamor, 2018; Clark, 2020). Migrants who leave their home country by personal choice for a new country in search for (better) job opportunities are called economic migrants (Constant and Zimmermann, 2013), characterized by more innate abilities and motivation for economic advancement and certain degree of risk tolerance (Kushnirovich et al., 2017). They usually stay abroad temporarily and may thus not necessarily de-register from the home country (Marks-Bielska et al., 2015). To emphasize mobility, related processes but also individual perspective and autonomy of migration, Scheel and Tazzioli (2022) enact a migrant as a person “who, in order to move to or stay in a desired place, has to struggle against bordering practices and processes of boundary-making that are implicated by the national order of things” (cf. Scheel and Tazzioli, 2022: 3).

Individuals seeking wage employment abroad are migrant workers who are yet to be engaged, are currently engaged or have previously been engaged in a remunerated activity in the host country (IOM, 2005). Individuals who move to trade or to set up small businesses abroad are engaged in remunerated activity other than under a contract of employment and earn their living through these non-waged activities by normally working alone or with family members (IOM, 2008; IOM, 2020). Such self-employed without employees are known as solo-self-employed, encompassing individuals from a diverse range of activities such as shopkeepers, independent contractors or artisans (Cieřlik and Dvouletý, 2019). In cases, self-employment may be regarded as a non-standard form of employment. This applies when an individual runs own economic activity through engaging with one entrepreneur: for the latter this is an alternative to employing costly, inflexible labor but for the individual it is fake or “bogus” self-employment” (cf. Ulceluse and Kahanec, 2022) when serving only one customer, e.g., the former employer (Bąk-Grabowska, 20214).

When moving away from the country of origin, the outward migrant (emigrant) becomes an inward migrant (immigrant) to the receiving country (Aliaga-Isla and Rialp, 2013; Isaac, 2013). People moving between countries are therefore both: emigrant (home country perspective) and immigrant (host country perspective) at the same time (Marks-Bielska et al., 2015; Okólski, 2012). Immigrants are a self-selected group of rational individuals who undertake risks such as migration to

maximize lifetime earnings and improve life chances (Kushnirovich et al., 2017). An official or legal definition on the term immigrant remains contingent to national incorporation regimes and thus differs from country to country (Rath, 2006).

2.1.2 Typologies of international migration

In globalizing times, for many individuals, constantly changing their centers of interest across borders to sustain a living has developed into a regular life strategy. This has become reflected also in forming typologies on international migration to differentiate groups of labor migrants, as for instance Engbersen et al. (2013) suggested as follows:

1. *permanent migration* is moving for good with integration into the host country;
2. *temporary migration*, including short term, seasonal, or circular but also return migration, implies migration for predefined periods of time and include return (Dustmann, 2000; King, 2017); usually, migration is repeatedly undertaken as the distance between the home and host country is bearable and transportation cost are affordable; however, these migrants are less strongly integrated socially abroad (Scheu und Kuckertz, 2022);
3. “*unpredictable*” migration with notions of “intentionally unpredictable” (cf. Drinkwater and Garapich, 2015: 1913) or “deliberate indeterminacy” (cf. Snel et al., 2015: 6), referring to educated young singles or newlyweds who tour the world while retaining all options of remaining, returning or moving further on.

In these scenarios, there are either no return(s), partial return(s), repetitive return(s), or a final return, however, for the latter in cases with possibly new migration with another single, double, or multiple return. Consequently, returning may always be beginning (cf. Pauli, 2021: 104; similar Miah, 2022), making return migration an “integral part of the emigration process” (cf. Kaczmarczyk and Lesińska, 2013: 29), or in broader perspective “a sub-process of international migration” (Cassarino, 2004: 253; similar Battistella, 2018).

2.1.3 Return migration

While there is no consensus on the definition of international migration, the quest for consensus on the term return migration is even more problematic (Battistella, 2018). Many terms have been created over time attempting to capture the phenomena's growing complexity: counter stream or reverse migration, U-turn migration, homeward migration, homecoming, repatriation, re-integration, and the more (King and Kuschminder, 2022; Pauli, 2021). Therefore, theorizing on defining the term remains rather broad to deliberately capture various types, circumstances, or perspectives of researchers, policymakers, or practitioners (King and Kuschminder, 2022).

Bovenberk (1974) refers to return migration when migrants return to their country of origin after emigration for the first time (Bovenberk, 2012). King (1978) views return migration as a movement ending up in going back to where one started geographically (King, 2000; Pauli, 2021), originally to resettle rather permanently (Gmelch, 1980). King and Christou (2011) reflect return as a broader concept with return migration as the physical relocation to the place of origin for some time or permanently. Kunuroglu et al. (2016) define return migration as the move of migrants and their families back to the country of origin by their own will and after a significant period of staying abroad. Return is, finally, the "concluding moment of the migratory project" (cf. Battistella, 2018: 10; seen in same vein by White, 2022), undertaken by first, second, third or third-plus generations as well as by diaspora members (Constant, 2021).

The EU Commission (2022) defines return migration as the movement from a host country back to the country of origin, of nationality, or of usual residence after a significant period of time abroad. The UNDESA (1998) understands return migration as the movement back to the country of citizenship intending to stay at least one year while the ILO (2018) assigns a minimum duration of six months with regards to labor migrants (Wickramasekara, 2019). The IOM (2021) defines return migration as a process that takes the migrant back to his point of departure, including one's culture, family, and home. The Migration Data Portal (2022) understands return migration as the act of going back to the point of departure.

The returning migrant is a returnee (Arowolo, 2000) who needs to undergo a re-adaption process to changed cultural and behavioral patterns of his home country (Cassarino, 2004). If he was an entrepreneur at the host country, he was an immigrant (ethnic) entrepreneur previously (Bai, 2017).

Acknowledging the need for statistical purpose, the time constraint is of concern, though it remains fragmented: King and Kuschminder (2022) suggest three months as a period of stay in the home country sufficient to be exposed socially, economically, and culturally to impact the home country's economy. Before homecoming, the returnee should have stayed sufficiently long abroad to absorb experiences and values to utilize these assets upon return with impact (King, 1986). Moreover, returnees are included into statistical capturing of immigrant numbers, ideally upon registered re-entry (Dustmann, 2000; Vercauteren, 2019; Okólski, 2012).

2.1.4 Typologies of returnees

Different return strategies cause different types of return, confirming return migration to not be a homogeneous phenomenon (Battistella, 2018). Firstly, migrants may be classified by the level of development of involved countries and their skill level: low-skilled migrants merely move from poor to richer countries for survival (wage differentials), for family support (income diversification, remittances), savings accumulation (for upon return) or experience (human capital accumulation). High-skilled migrants may move in the same direction but in these cases, the income differential is the key factor (King and Kuschminder, 2022). Respectively, within European context and particularly the post-war period, migration routes established along the need for (guestworker) labor in developed Western European countries from Southern European economies, forming the traditional South-North European migration route (Barbulescu, 2017). With the early phase of EU accessions, migration was triggered from North to South, the fall of the communist regimes increased East to West European migration, and the 2004 EU accessions of CEE countries enhanced North-North European movements, largely to a (low cost) labor demand in low(er) value-added economic sectors, i.e., in the UK (Barbulescu, 2017; Lafleur et al., 2017; appendix III, IV, V, VI).

Secondly, Cerase (1974) has elaborated a fourth fold typology of (more permanent) returns with regards to economic target fulfilment that links pre-migratory and migration experience as well as

type of return in relation to economic development potential upon return (King, 1986; Lang and Nadler, 2014; King and Kuschminder, 2022; Glorius, 2023). There are four types of returns:

1. Return for *retirement* with generally no consecutive occupational choice at home and thus no further innovative impact;
2. Return for conservatism occurs after a few years as planned, i.e., once the initial migration targets are reached and allow for the desired improved life at home. Yet, at the same time no further innovation and change of social context is desired by returning individual;
3. Return of *failure* when individuals fail to integrate successfully into the host society with almost nothing to bring back to the home country;
4. Return of *innovation* when returnees use acquired home and host skills along with acquired migration financial capital to drive innovative change at home, i.e., through establishing nano or micro-SMEs which is why a relatively high rate of self-employed returnees can be expected (Cerese, 1974; as discussed e. g. in Lang and Nadler, 2014).

Apparently, it is the return for innovation that supposedly utilizes lifetime experiences of returnees in working age towards maximum (Olesen, 2002; Chlebek, 2011; Debnath, 2016) which is why returnees are considered potential contributors to economic home country development (Battistella, 2018). Returnees add value to the home economy through new professional experience and competences acquired during the migrants' stay abroad, when the acquired expertise and skills meet the requirements in the domestic (labour) market, and when migrants are able to utilize their new professional abilities after return effectively (cf. Lesińska, 2013). Moreover, it is the returnee's concrete expectation to drive change at home (Lang and Nadler, 2014), so they intent to position themselves in other fields of activity than prior to migration, i.e., by choosing entrepreneurial activities (Battistella, 2018). To contribute sustainably, however, there need to be advantageous conditions such as profitable investment opportunities free of corruption, a favorable economic climate, and an open structural and cultural environment (Lianos and Pseiridis, 2009; Wahba, 2014; King and Kuschminder, 2022), as otherwise return turns into failure (King, 1978). Return for innovation should therefore be addressed in policies to encourage effective entrepreneurship (Battistella, 2018).

Thirdly, beyond the dichotomy of success and failure, Cassarino (2004) developed a typology that emphasizes the level of preparedness through readiness and willingness for a successful return: only those highly prepared (informed) for return may act as the actors for change (Smoliner et al., 2013; Lang and Nadler, 2014; Glorius, 2023). Being prepared for return includes attributes such as willingness and readiness (King and Kuschminder, 2022), aspiration (as the sum of personal goals and awareness of opportunities) and capabilities (including action and resources) for the return to actually happen (cf. Kaczmarczyk et al., 2020a: 12). Battistella (2018) details individual preparedness as psychological, technical, financial, and social preparedness as well as institutional preparedness on central and local institutional level which all need to interact effectively to provide for a successful return. However, immigrants may get stuck between return thoughts and stay, and find themselves in a state of “utopian future” where return may remain a “myth” (cf. King, 2022; similar Brzozowska and Postuła, 2022). Such mental state arises because of anticipating barriers to return which may, at the end, not appear had one been better informed and prepared (Vercauteren, 2019). Return for nostalgia is, by the way, no rationale for a homecoming due to needs of effective reinsertion into the home country labor market (Battistella, 2018).

2.2 Theorizing about return migration in economic context

2.2.1 Development of the research field

Research on international migration has grown globally and become a recognized interdisciplinary subject studied from geographical (“spatial wander movements”), political (“politics and policies”), sociological (“living conditions”), or economic (“labor market consequences”) points of view, with each developing different perspective regarding its theoretical description and explanation (Kalter, 2000: 438; Currell, 2006; Hoesch, 2018; Kijonka and Žak, 2020).

One of the earliest scholars who theorized about migration was geographer Ernst Georg Ravenstein by formulating generalizations on the concept of migration in the late 1880ies (Ravenstein 1885 – 1889; discussed in e. g. in Tobler, 1995; King, 2012). Accordingly, despite initial internal migration (of the British on the isle) had mainly economic reasons, it should not be treated merely as an economic phenomenon (Miłaszewicz et al., 2015). Moreover, although Ravenstein found rural-urban flows to be dominant, he already acknowledged the presence of return migration (Richmond,

1983; Bijak, 2006). Respectively, scholars of different disciplines such as economics, anthropologists, geographers, or psychologists began to develop theories explaining causes and (later) consequences of migration, including return migration, though in fragmented manner. The most traditional theories see economic factors as the greatest influence on migration while contemporary ones focus also on non-economic motives (Miłaszewicz et al., 2015).

From a contemporary perspective, the igniting spark to deal academically with return of labor migration in large numbers was the oil crisis in the 1970ies, when Western European Countries (Germany, France etc.) stopped inward (guestworker) migration and encouraged their return back to Southern Europe, though times were also characterized by industrial restructuring, the decline of the Fordist system, or economic growth in Southern Europe (Nadler et al., 2016). Despite rising return movements and respective implications to affected economies and societies, the 1980ies and 1990ies experienced scholarly non-interest in the field while increasing global mobility, transnationalism, new migration patterns and diaspora studies as of the 2000s re-ignited and advanced scholarly interest in return migration (King and Christou, 2011; Battistella, 2018). This applies to regions like CEE (Apsite-Berina et al., 2019; King and Kuschminder, 2022), including Poland (King et al., 2022). Particularly, temporary migration has become a means to moderate illegal migration and to deal with immigration pressures (Dustmann et al., 1996).

Academic literature on return migration concerns mainly with planned returns, i.e., when the migrant chooses on own accounts to return after some time spent abroad that allowed for accrual of migration experience, financials, or skills (White, 2022). However, rising dynamism and complexity, diversification and interwovenness of existing and emerging migration topics require continued and further distinct systematic theorizing within and across disciplines but this is challenging, especially when capturing the phenomena statistically (De Haas, 2021; Hoesch, 2018, 60; King, 2013). Consequently, and as social phenomena occur in specific realities, there cannot be one globally accepted theory of international (return) migration (Richmond, 1983) but a complementary set of theories and approaches from within and across disciplines in order to capture rising complexity of human mobility (De Haas, 2021; Pauli, 2021).

Generally, labor workers exhibit a tendency to migrate internationally less frequently than within their own countries or regions (Clark, 2020). However, when international migration does occur, it is typically from a less developed to a more developed country, driven by strategic considerations (Kobayashi, 2019; Filimonau and Mika, 2019) and often with a return at some point in time (Gmelch, 1980; Dustmann et al., 1996; Hagan and Wassink, 2020). Literature on related economics regards these individual return migration decision as part of a lifetime strategy with maximizing utility as the guiding principle, i.e., based on cost and benefit calculations (Wahba, 2022). Two main questions arise: why people return (determinants) and what are implications of return (consequences) (Wahba, 2022) which have been widely investigated in country specific analysis (Vercauteren, 2019).

Since between 20 to 50 percent of immigrants leave the host country within five years after arrival (Lara et al., 2021), return migration has established a non-neglectable phenomena. Therefore, return migration has received increasing attention, especially as it is beneficial to home economies when the migrant applies or is enabled to apply accrued overseas experience and knowledge back home (Wahba, 2015a). A more recent trend in scholarly economic analysis advances the search for causal relationship to questions like what would have happened if the same individual had not migrated or would have return migrants behaved the same way had they not migrated (Wahba, 2022). Moreover, there is a growing body of research on the employment mobility of return migrants (Jephcote et al., 2022). Additionally, return migration is observable due to refugee crisis and political developments in the USA and Europe and consequences are investigated, such as refugee entrepreneurship (King and Kuschminder, 2022). Also, sociologist scholars deviate from the “excessive preoccupation with economic issues of migration and return” by addressing for instance the complexity of self-employment experience, including cultural and bibliographical aspects (cf. Vlase and Croitoru, 2019: 3). Despite such rising growth in scholarly contributions to the phenomena, return migration still remains overlooked in mainstream migration theorizing (Hagan and Wassink, 2020; King and Kuschminder, 2022).

With the focus on this dissertation, in spite of rich literature on economic aspects of international migration from Poland (Pisarevskaya et al., 2020), the research on return migration is rather limited (Miłaszewicz et al., 2015; Kunurogl et al., 2016; Lesińska, 2013) and focuses mainly on labor

market reintegration (Kaczmarczyk, 2012 & 2006; Martin and Radu, 2012), often at regional level (Brzozowski, 2011; Brzozowski and Coniglio, 2016; Brzozowski et al., 2017; Anacka and Wójcicka, 2019). Due to increasing immigration numbers and established immigrant businesses, new scholarly focus on immigrant entrepreneurship establishing in Poland (Glinka, 2018).

2.2.2 Theoretical approaches to return migration

As return migration is integral part of the migration process, it follows from and is analyzed within the theories of (international) migration (Constant and Massey, 2002; Currie, 2006; Hołda et al., 2011; Kunuroglu et al., 2016; Apsite-Berina et al., 2019).² Supply and demand factors determine international migration, i.e., emigration shapes the supply side while a host country's immigration policy represents the demand side (Mayda, 2005). From this economic migrant perspective, migration allows to benefit from differences in rates of return to labor across countries (Ibidem).

A first set of theories and theoretical approaches regards initiation of international migration. For instance, classical and neoclassical theories provide for a labor supply and demand framework while the segmented labor market theory looks at migration more from a demand perspective of a host country. The “neo” supposedly reflects additional intervening variables that in addition to pure economic factors foster or hinder migration (O'Reilly, 2022). Following, the world systems theory describes the more (traditional) directions of international migration and the actions taken by migrants from a structural perspective (Ibidem). Network theory, cumulative causation or institutional theory apply to ongoing migration and migration flows. Finally, the migration hump may explain reasons for decreasing migration. These and other macro-level and micro-level related theories, concepts and approaches are introduced in the following section with regards to the focus of return migration of labor migrants. As there will not be an “all-encompassing and all-explaining meta-theory on migration” (cf. De Haas, 2007: 10; similar Massey et al., 1993), combining and integrating different theoretical perspectives on migration developed into a strategy in explaining the phenomena (Constant, 2021).

² Appendix I and II offer systematic overviews of how the following selected theories and approaches intersect and interplay with other.

A. Classical Views

For Lewis (1954), migration played a pivotal role in economic development (Arango, 2018). Originally to model post-colonial economic development, the modern (industrializing) sector takes labor surplus from the traditional (agricultural) sector at low cost (Ibidem). Through unlimited outward migration from the traditional sector based on wage differentials between the two sectors, the traditional sector can stabilize the production function towards higher capital-output ration and thus drive economic development (Ibidem). Wages then constitute a direct contribution of workers to an economy (Kumpikaitė -Valiūnienė et al., 2021). More precisely, the purchasing power parities for earnings (GDP per capita) provide for a rather realistic differential evaluation (Ibidem).³

More contemporarily, the classical work of Massey (1998) distinguished two types of migration theories: initiation of international migration and its perpetuation (Bahna, 2016). Firstly, the world systems theory extended by Portes and Walton (1981) and (economic) institutional theory (North, 1992) constitute, though rather *ex ante*, that migration origins in structural transformation processes of societies when developing economically (Massey, 2015; Arango, 2018). Accordingly, a country's transformation causes deep restructuring of existing social and institutional realities, affecting people and their opportunities of earning a living (Massey, 2015). Secondly, and for developed host economies, a constant demand for low-wage workers pulls labor surplus towards their labor markets, though usually into their secondary economy (Hagan-Zenker, 2008; Arango, 2018; Karpestam and Andersson, 2019). As inflation makes labor expensive on both the capital-intensive primary sector (well paid jobs for natives) as well as on the labor-intensive secondary sector (unskilled jobs), low skilled migrants take those available jobs over natives. This explanation extends into a more neoclassical view which is provided by the Segmented or Dual Labor Market Theory developed by Poire (1979) (Hagan-Zenker, 2008; Massey, 2015). Migrants, if rather unattached to the host society, then take these jobs on a temporary basis, i.e., short-term, circular, repetitive, or seasonal (Hagan-Zenker, 2008). The duration of migration, however, may increase the likelihood of engaging in settlement in the primary, formal sector of the economy (Gunewardena and Seck, 2020).

³ Appendix VII, VIII, IX show the development of monthly minimum gross wage in Poland, the UK and across EU. Appendix X shows the GDP per capita development in selected EU countries from 1999 to 2018.

The model, however, fails to explain why emigrants from one home country may be more attracted to a certain host country than migrants from similar geographical regions to that same host country, despite existing wage differentials among countries (Bahna, 2016). Also, the approach overlooks that migrants may indeed wish to actually settle permanently and that they may (wish to) create (niche) jobs that would otherwise not exist in the host country (O'Reilly, 2022).

Additionally, migration from poorer to richer countries intensifies in perpetuating manner when ethnic communities accommodate continued immigrant integration (Rutkowska-Ziarko et al., 2017; White and Grabowska, 2018). Migration becomes self-perpetuating as ongoing migration establishes and enhances established social infrastructures in form of integrational assistance that lower risk and cost for future migrants (Massey, 2015). Moreover, it causes ethnic communities to require immigrant labor supply for themselves and establish a third labor market sector (Ibidem).

Most contemporarily, the seminal article from the perspective of this study is the contribution by Cassarino (2004): he applied existing theoretical frames to the analysis of migration such as 1) Neoclassical Economics, 2) New Economics of Labor Migration, 3) Structural Approach, 4) Transnationalism, and 5) Social Network Theory which are labelled as the “five key theories” (cf. Debnath, 2016: 3). Currell (2006) confirms these to explain focal points of research on return migration, though not the full complexity of the phenomena and difficult to proof empirically in lack of respective comparable data on return migration (King and Kuschminder, 2022; Wahba, 2022).

B. Neoclassical Economics (NE)

Probably most influential in migration context (Arango, 2018), Neoclassical Economics (henceforth: NE) postulates that people move to maximize their net lifetime earnings (Massey, 2015; Constant and Massey, 2002). They compare current earnings to future earnings at cost-benefit ratio, wherever these may be realized (Ranis and Fei, 1961; Sjastaad, 1962; Todaro, 1969; Harris and Todaro, 1970; Massey, 2015). Migration happens when the migrant becomes productive and when there is a return on this investment to be expected (Grabowska and Jastrzębowska, 2023). It establishes optimal and long-term factor price equalization through (cross country) redistribution of factors of production (Heckscher-Ohlin model, 1933; De Haas, 2007; Zlotnik, 2019). Under the

provision of free movement but limited perfect information about wage rates and area characteristics, the more educated migrant (*rational economic individual*, as unit of analysis) voluntarily migrates rather permanently from low paid areas to high(er) paid areas which causes both the areas as well as the migrant to develop economically (Brzozowski, 2017; Zlotnik, 2019; Oso et al., 2022). Wage differentials are therefore a “principal cause of [volunteer] migration” in search for better living (Lee, 1966; Richmond, 1983; Marks-Bielska et al., 2015). Since costs are involved, migration contributes to the migrant’s investment and reward in human capital (Sjaastad, 1962; Arango, 2018), though negatively when not used back at home (Constant and Massey, 2002).

Unsurprisingly, the first emigration waves earn beneficial employment but for following waves, however, these opportunities shrink continuously and end up in reduced real wages and less attractiveness (Clark, 2020). Migration then loses its incentive as labor resources are more and more utilized effectively (Zlotnik, 2019). A total elimination of the wage differentials would end labor migration at its peak (Wickramasinghe, 2016). The threat of upcoming host unemployment does not necessarily cause return: the most common reason for outward migration remains in higher net differentials, and as long as these remain higher abroad than at home, a return may not be chosen, especially not by the higher skilled individuals (Hořda et al., 2011). Additionally, this assumption holds true if the host country supports unemployment with respective benefits (White, 2014). Actual unemployment abroad does cause return migration (Bijwaard and Wahba, 2023). Furthermore, return is accompanied by a net decrease in remittances with negative impact on the individual’s household. Actual return migration is then viewed as a failure (King and Kuschminder, 2022) as the returnee was unsuccessful to maximize net earnings long lastingly in lack of required skills, or miscalculation of related cost (Debnath, 2016). Upon return, choosing “spontaneously” into self-employment as occupation may then only be a temporary choice to bridge time until more gainful wage-employment is found on long-term basis (“parking lot”, cf. Harris and Todaro, 1970; Brück et al., 2018). Respective self-employment would then, however, be more into small scale, informal self-employment than large-scale enterprises (Brück et al., 2018).

Despite NE emphasizes (permanent) outward migration (Constant and Massey, 2002), return may still be beneficial: returning migrants come back more skilled which can be taken advantageously by the home country upon return (Marks-Bielska et al., 2015). However, risks and uncertainties

are not reflected in NE which limits explanatory power, although from a pure economical point of view the model holds, though more so from the perspective of income maximization than cost-minimization (cost-avoidance) (Batista and McKenzie, 2021).

C. New Economics of Labor Migration (NELM)

The New Economics of Labor Migration (henceforth: NELM) is, according to one of its founder Stark (1978 and 1991) and to many of its proponents, “probably the most migration-specific of all migration theories” (cf. Arango, 2018: 106). It reflects migration as a well-planned, logical consequence of a fulfilled and collective, interdependent strategy of a household (as the unit of analysis on migration decision-making) to deal with market failures and associated risks for stable employment and income. Strategically, the household does not necessarily need to move as a whole entity: risk diversity secures home country ties, capital flows (remittances) and incomes (from migration savings) increase home country consumption qualitatively (Stark and Bloom, 1985; Brzozowski, 2017; Karpestam and Andersson, 2019; Schiele, 2021). The more the migrant works abroad and the higher he earns, the shorter his stay abroad which, however, causes little interest in host country integration and therefore predicts return (Constant and Massey, 2002). If, however, an earning spouse (without presence of children) joins abroad, the household meets the earning target even quicker and promotes more short-term trips home and return(s) (Ibidem). Thus, migration happens only for a limited period of time (i.e., temporary) (Curre, 2006; similar De Haas, 2010; Arango, 2018; Oso et al., 2022) and bears an integral or even logical return process (Wickramasinghe, 2016) and is therefore a “calculated strategy” (cf. Debnath, 2016: 3; similar Curre, 2006; Pauli and Osowska, 2019). Upon return, migration financials may be used for productive purposes such as entrepreneurial activities (Karpestam and Andersson, 2019), thus increasing social status of the returnee and his household (Constant and Massey, 2002). Within this theoretical framework, return of the migrant is then norm and expected outcome (King and Kuschminder, 2022), independently of a related (low) social status at the host country (Constant and Massey, 2022).

Yet, as return motives of migrants are in fact heterogenous, some migrants may settle more permanently to maximize lifetime earnings (NE) while others move more temporarily until the

earning target is reached (NELM) (Constant and Massey, 2002). Therefore, NE and NELM may be “true at the same time” when analyzing migrant behavior (cf. Schiele, 2021: 111).

D. Structural Approach

Some of the missing factors in NE or NELM are recognized in the structural approach (linked to Cassarino, 2004 and Gmelch, 1980). It emphasizes the influence of socio-political and cultural factors of the home country, how these are perceived by the migrant while staying abroad and how they influence (return) migration decision from abroad (Currle, 2006; Debnath, 2016; Brzozowski and Coniglio, 2016; Oso et al., 2022). It applies the realities of both the home and the host society along with related expectations by the returnee (Chlebek, 2011) but also reflects the unpredictability of individual and subjective life course decisions (Glorius, 2023). Return is then guided by the opportunities that the migrant expects to find at home but already offered while still residing at the host country (Cassarino, 2004). Cerase (1974), besides preparedness, emphasizes in this context aspiration and management of expectation as prerequisites for related migration results.

However, the planning process is difficult from abroad due to incomplete information of the upcoming realities which makes the returnee hardly fully prepared for the return and therefore, return may not impact the home society as anticipated (Cassarino, 2004). This, in return, influences how returnees invest their migration experience, e.g., into entrepreneurship. Acquired skills are important for reintegration but may be wasted partially due to challenging situations such as incompatibility with the level of home country economic development, a traditional family context into which the returnees will be re-embedded (Cassarino, 2004) or lacking the recognition of effective migrant networking linking home and host countries effectively (Chlebek, 2011). Additionally, in need for being reaccepted socially upon return, returnees may then use their migration capital ineffectively: for unproductive investment and conspicuous consumption and not for innovation (Cassarino, 2004: 260). Such behavior then “breed the unequal relationship between the core (receiving countries) and the periphery (sending countries)” (cf. Cassarino, 2004: 260). A business-friendly institutional environment and economic progress of the home country are therefore crucial for productive investments and initiatives (Ibidem). Return, consequently, encompasses personal but also social and institutional context (Debnath, 2016).

E. World Systems Analysis

According to Wallerstein (1984, 2004) capitalism is a system of endless capital accumulation as the main economic objective (Jennissen, 2004). To continue the process, new resources are constantly needed, and these resources are new markets and new low-cost labor (Ibidem). Exchanges of these resources maintain capital flows, in many cases towards the more developed countries that leave the more periphery countries economically behind or even dependent on it (Ibidem). In return, some countries, are referred to as semi-peripheral, a specific kind of suspension between the status of an immigration center, thus resembling former core countries, and the status of an (im)migration periphery (Żołądowski, 2020). Despite, these developments cause discrepancies between migration countries and determine the volume of respective migration flows towards core states (Jennissen, 2004; De Haas, 2007). The approach explains differences in size of migration to these centers as well as the existence of intense migration to the countries that apply restrictive immigration policy of family reunification processes or return migration (Rutkowska-Ziarko et al., 2017). The approach, however, lacks the identification of the causes of migration and the accounting for economic factors determining the varying intensity of the population flow (Ibidem).

Specifically, within the geographical area of the EU, there is a dichotomous division into developed core Western European states and lesser developed new Eastern European member states (CEE) on its peripheries (Żołądowski, 2020) which influences the magnitude of societal development and its perception both from the inside and the outside (Nowicka-Franczak, 2018).

F. Transition, Crowding out, Modernization

Zelinsky (1971), for instance, formulated a rather general hypothesis of mobility transition of a country's developmental stage for which migration contributes to (necessary) economic and social changes during derived modernization processes (Hagan-Zenker, 2008). At the end, the dominance of emigration reverts into the opposite, predominately analyzed from a demographic point of view (Okólski, 2021). Respective patterns and rates of migration are directly linked to the stage of the development of these processes (e.g. industrialization, degree of freedom) or demographic factors (e.g. level of birth rates) (Hagan-Zenker, 2008). However, in contemporary Europe, and especially

with regards to the events of 1989 and countries of CEE, there needs to be a delineation to circumstances that relate to migration transition (Okólski, 2021).

Aidis (2005) declares transition to be finalized when the country reaches the level of an advanced market economy. A critical milestone in fulfilling related requirements was for instance the accession into the EU (Aidis, 2005). Okólski (2012) elaborates on the related concept of modernization, a domain of sociology whereas the concept of economic development is more the domain of economists, two different aspects and contexts in relation to change. Migration, respectively, takes place when a periphery is included into the globalizing economy. These processes take place when the old is resembled by the new which leads to a societal, political and economic transformation of the region (Ibidem). Related economic performance is expressed through (rising) GDP (Fischer and Sahay, 2000). Correlating to the demographic transition, modernization comes with a crowding out effect of redundant population, indispensable for the modernization processes to be considered complete at some point in time (Kaczmarczyk and Okólski, 2008; Okólski, 2021). A major effect of modernization completion is the change in the country's status from a net emigration to a net immigration country (Ibidem). In broader perspective, developments on actual return migration are a reliable indicator of the status of maturity of an economy (Van Houte and Davids, 2008).

G. Push-Pull Framework, Selectivity

In order to explain why and how people migrate to a certain country while others do not, spatial models have been most referred to by Lee (1966) who argues that migration takes place in predefined streams from and to specific places because of gainful economic opportunities and backflows of knowledge to the home country which, in return, facilitates more emigration (De Haas, 2007). For instance, improvements in income opportunities at the host country increase the size of emigration rates, however, a variable affecting a respective move is distance as it increases the cost of migration the further away the host country is from home (Mayda, 2005). With regards to return migration, pull factors of the home country prevail over push factors in the host country (Tran et al., 2017). A respective “push-pull-framework”, a rather simple descriptive model, was developed to include several factors when making migration decisions, both from the home country perspective and host country perspective. Accordingly, these factors push and pull people (or households)

into migration (Ibidem). Migration flows are a function of these factors (Rutkowska-Ziarko et al., 2017). Generally, economists use regression analysis to estimate statistically respective effects but influencing variables interact and change over time which cause statistical challenges (Ibidem).

Individuals, moreover, respond to push and pull factors individually which makes migration selective (De Haas, 2007; Fouda, 2021) and the model limited in explanation power (Rutkowska-Ziarko et al., 2017). Migrant selectivity is a stratifying mechanism for the general population from which migrants are selected but also for certain groups within a population (e.g., young adults) from which again people select themselves into migration (cf. Grabowska et al., 2023: 14). The key question is who migrates and who does not (Feliciano, 2020).

There are different dimensions of selectivity (cf. Grabowska et al., 2023):

1. When migrants who leave the home country are primarily skilled individuals, this is referred to as positive selection because migration presents a hurdle for the low-skilled.
2. When migrants from the home country are primarily low-skilled, this is referred to as negative selection.
3. When migrants display the same skill level, on average, as those who remain behind, this is referred to as intermediate selection.
4. Return migration, particularly, is partially biased, because mostly the successful stay in destination countries. However, there are positive and negative selection models.

Consequently, the skill distribution of the emigrants affect the wage structure in both the home and the host country. Moreover, the non-randomness selection mechanism affects the level and distribution of welfare (Borjas et al., 2019). Additionally, selectivity influences the immigration perspective of the host country with regards to theory building or policy making (Feliciano, 2020). It is again the question of who immigrates and who does not (Ibidem). Positive selection of immigrants may explain the (economic) success of immigrants in the domain of labor markets (Ibidem).

From a statistical point of view, there is pre-migration selectivity which is about comparing emigrants to non-movers in a home country and post-migration selectivity which is about comparing immigrants to natives in a host country or comparing return migrants to non-migrants back to a

home country (Grabowska et al., 2023). Respectively, a first self-selection process occurs *between* households located in the home country, i.e., one household selects to send an emigrant while others do not, despite they may think of it at some later point in time (Murard, 2019). Second, there is then a following step in the selection process: *within* the migrant sending household, where it is the question which of the household members migrates and that is said to be a non-random choice, i.e., such conscious decision is directly related to certain push or pull factors (Ibidem). And these two events are hardly observable and therefore to capture statistically from outside (Ibidem). Moreover, if such unobserved characteristics influence human behavior in an almost simultaneous manner, bias distorts empirical results.⁴

With respect to return migration, migrant selectivity is then about how returnees differ from people who had not migrated abroad (Grabowska et al., 2023). Migrants differ from non-migrants on rather easily observable characteristics such as age, gender, educational and occupational levels but they may differ on rather hard-to-observe and hard-to-measure characteristics such as aspiration, ambition, motivation, work ethic, risk-taking etc. (cf. Ibidem: 4). Respectively, capturing the economic impact of return migration needs to reflect both the decision into emigration and into return migration as otherwise the impact of return migration is incorrectly estimated (Wahba, 2014). Again, the underlying migration decision for return process is then also a multi-stage process that itself complicates increasingly causal estimations of its effect (Batista et al., 2014). First, the non-randomness of return migrants among migrants becomes challenging: Not only are emigrants a selected group but who returns from that group also, causing “significant selection bias” as not everybody returns or not every successful migrant returns home (cf. Wahba, 2014: 15; re-strengthened in Wahba, 2015a, b; Wahba, 2022). If a host country pulls skilled migrants, return migrants will likely consist of the less skilled on average than the remaining immigrants in the host country while if a host country attracts relatively unskilled workers, it will be the better skilled among them who are most likely to return (Wahba, 2021). Consequently, return migration then becomes the “reverse of the initial selection process” (cf. Wahba, 2014: 11; also Wahba, 2015a; similar Rooth and Saarela, 2007). This is important to return policy designing.

⁴ The related issue of endogeneity will be addressed in chapter 5.

Second, the probability of returnees to then enter into entrepreneurship upon return and the linkage to market outcome require to additionally recognize the issues of endogeneity and simultaneity in the decisions to re-migrate *and* to start a new enterprise upon return (Brück et al., 2018). This depends on different factors such as the dependence of the static point in time of choice into self-employment and migration duration which is dynamic as well as the dependence of previous self-employment during emigration and persistence of being self-employed upon return (Ibidem). Such upwardly bias is also difficult to deal with statistically (Naudé et al., 2017; Mahé, 2021). Yet, “after addressing the endogeneity and selectivity problems, return migration has indeed increased entrepreneurship and micro-enterprise development in origin countries” (cf. Wahba, 2022: 30).

H. Social Network Theory

The theory emphasizes that international migration is outcome of individual, social, economic, and political factor interplay (Czaika and Reinprecht, 2022). Social and business networks, such as family, friends, business partners, institutions, communities etc. define a set of interpersonal, relational, and interacting ties that connect the migrant and non-migrant community at the home and the host country by providing necessary connections that influence a migrant’s decision making and socio-economic behavior (Gruenhagen, 2019). Each act of migration creates and perpetuates social capital among people to whom the new migrant is related to, thereby raising the odds of their migration, even in cases when wage differentials disappeared (Bahna, 2016; Oso et al., 2022).

Membership in such a network is not an inherent right, but a deliberate choice made by an individual, entailing the acceptance of organizational and social structures, as well as a commitment to adapt to change. It also involves a sustained personal involvement and effective communication among its members (Cassarino, 2004). The duration of migration plays a crucial role; the higher the quality of the networks, the more likely migration occurs voluntarily. This, in turn, enhances the recognition and realization of better return opportunities, benefiting both the individual and the home society (Curre, 2006). Prior to (informed) return, the returnee mobilizes his tangible resources such as financials and places to go as well as intangible resources such as networks and skills from “commonality of interest” (cf. Cassarino, 2004: 265) with their quality decisive for a successful return (King and Kuschminder, 2022). In doing so, the risks associated with the liability

of newness and liability of returnee are reduced (Bai, 2017; Bai et al., 2021). Preparedness, however, especially in context of dependencies on networks, is to be extended to include those who have stayed behind at home during emigration, and it becomes decisive how they are prepared to actually receive returnees, as “they must create a new place in the old place” (cf. Pauli, 2021: 105). This also applies to intuitions which are responsible for the governance of migration through equipping the returnee with adequate opportunities and effective services (Battistella, 2018).

I. Knowledge-based view

Social capital is innately developed and not transferrable between individuals (Gittins, Lang and Sass, 2015). Human capital, by contrast, is developed through experience, knowledge and skills. While the social capital theory focusses on external knowledge building, the knowledge based (resource based) view builds complementary on internal knowledge acquisition, its development and deployment within an organization (Akkurt, 2016). There is more explicit knowledge, which is easier to articulate, to describe and to transfer between individuals and as such organizations while tacit knowledge is not, and as such hard to transfer or to integrate into organizations. Uniquely built and stored within an individual, such knowledge is moreover difficult to replicate and not easy to find otherwise within a short period of time. Experience and learning by doing is a prerequisite to build, use and apply it (Ibidem). Specifically, learning by doing along with (international) experimental learning is essential to entrepreneurship which, specifically, can be learnt (Lazard 2005; Mahé, 2018; Bai, 2017). It is regarded the most strategically important resource through which a firm coordinates other resources and builds comparative advantage (Bai, 2017; Wach, 2020). For micro businesses, technical knowledge at the initial phase might be sufficient but it is business knowledge that re-shifts the operational focus to managing business that needs to be developed (Gherhes et al., 2016: 9). Consequently, “knowledge brought by the entrepreneur to the firm is a key aspect in a firm’s performance”, with magnitude of deploying it deciding success over failure (cf. Akkurt, 2016: 9). It is most relevant for business sustainability (Bilan et al., 2020).

Within this context, migration forms and becomes part of a multidimensional, lifelong learning process (Mahé, 2018) and forms, moreover, “transnational capital”, that is value added to human capital by time spent abroad including foreign knowledge, technology, networks, and resources

(cf. Vanhonacker et al., 2014: 3). SME, respectively, may utilize especially non-tangible resources (knowledge) and particularly by (the higher skilled) returnees (Klein-Hitpaß, 2016) who may apply it in distinct way, i.e., as derived from individual migration experience such as being self-employed or entrepreneur. Moreover, it may contribute to internationalization of SME in the home country (Gittins and Fink, 2015). Respectively, performance and success of SME depend on the quality and effective deployment of scarce resources (Gittins, Lang and Sass, 2015). Applying accrued knowledge and international experience upon return is then the primary advantage to returnees (Fouda, 2021) which further needs to be transformed into daily routines and practices to develop sustained organizational capabilities (Bai, 2017; Grabowska and Jastrzębowska, 2023). However, making informed decision based on extended knowledge may cause returnees to deliberately not choose into self-employment but into wage-employment through assessing of how to best reward human capital and labor resource. By that, the number of less ability entrepreneurs are lowered which enhances sustainable operations (Brück et al., 2018).

J. Migration Systems Theory

Larger-scale migration consists of core receiving countries that are linked to a set of sending countries, and these countries are linked by migrating people, their historical, cultural, or other types of linkages and thus form a migration system (Mabogunje, 1970; Jenissen, 2004). Migration, respectively, influences the socio-economic development of the home country and encourage subsequent migration both at macro and micro levels (Wickramasinghe and Wimalaratana, 2016). Developing patterns reveal change in economic, social, cultural, and institutional settings in both the home and the host country (Jenissen, 2004; Wickramasinghe and Wimalaratana, 2016). Migration systems theory, therefore, goes beyond the social network theory (De Haas, 2007) and allows for anticipating migration flows, including return as, according to Ravenstein's laws of migration, there is always a couterstream to emigration (Ibidem).

K. Transnationalism

Transnationalism recognizes the globalizing world with migration as a multiple, back-and-forth event (circular, repetitive), and acknowledges persisting economic and social links between home

and host communities (Schiller, 1995; Portes et al., 1999; Cassarino, 2004). The anchor point is a defined country of origin to which the emigrant returns well-equipped and when the 'origin' is actually ready to absorb return (Currle, 2006). During migration, a migrant's identity is formed through home and host country dynamics, and complementary interconnections which are shaped through cross border networks (Chlebek, 2011; Nadler et al., 2016) that have been strengthened continuously by repeated visits at home and that, all together, prepare the migrant for a better (final) return (Chlebek, 2011). Return, consequently, is therefore prepared through point(s) of being ready after periodical and regular visits at home, and therefore, does not necessarily have to happen only once in order to be a success (Cassarino, 2004). The ties to the host country do not cease upon return, making return "not the end of the story" (cf. King and Kuschminder, 2022: 7).

L. Institutional Approach

In response to imbalances between employers of labor receiving countries and labor sending countries, institutions and organizations design frameworks to balance the mismatch through regulated processes such as visa granting or other aid and assistance (Wickramasinghe and Wimalaratana, 2016). Large scale migration then becomes institutionalized and immigration policies influence return migration decisions which set the macro-level framework respectively (Jenissen, 2004; Gruenhagen, 2019). The quality of these institutions mark an important determinant in the migrant decision making process which, however, itself influences the set up and running of these institutions (Tran et al., 2017). Return migration policies, specifically, are required in a design that promotes the decision to return, facilitates the process of return migration and provides for effective re-integration into the home country (social and economic) system (Lesińska, 2013). Respectively, potential negative consequences of return such as unemployment are balanced. Advanced policy making supports returnee occupational attainment already from abroad. With respect to taking up entrepreneurial activity, access to financials or provision of incentives smooth the transition back home and provide for a profitable return of investment to the state (Ibidem).

M. Migration Hump

When countries develop rapidly in economic and social terms, international migration increases (Martin, 1993; Massey, 1998; Olesen, 2002). Migration, respectively, does not come from lack of economic development but from development itself which in turn means people are able to afford migration causing selectivity into migration to increase (Olesen, 2002; De Haas, 2007). At some point in development, emigration decreases, and the country tend to become a net labor importer (De Haas, 2007). Economic development and decreasing income differentials then show inverted U shape on emigration which is called the migration hump (Ibidem). Once the migration income differential becomes too small, people are trapped in the migration hump as migration stops which limits an individual's (economic) prospective (Olesen, 2002; Martin-Shields et al., 2017).

N. Embeddedness

Return migration is regarded a process of re-embeddedness (cf. Van Houte and Davids, 2008: 14). As a concept within institutional economics (Granovetter, 1985), the concept of embeddedness was developed to measure (institutional) trust as “part and parcel of social networks that are crucial for successful company transactions” (cf. Van Houte and Davids, 2008: 1414). For returnees, re-embeddedness refers to the returnee's finding of his position in the home country society though senses of belonging and participation. It contains an economic dimension, a social network, and a psychosocial dimension that all interrelate and reinforce each other. Economic embeddedness, specifically, refers to the question of whether or not the returnee is able to re-build a sustainable livelihood through access to resources such as income, education, or housing. Applied to migrant entrepreneurship, this concept entails a process in which the returnee or his company participate in a given home country economy socially and economically on longer term basis (Ibidem).

As the above theories and approaches conceptualize international and return migration, it becomes clear that migration is not about sole individual economic motives but about a process encompassing more levels and perspectives: national and international levels, personal and network level, societal environments and institutional settings, goals, and opportunities, return(s) etc. (Nadler et al., 2016). They should be regarded as complementary concepts, despite respective challenges due

to incommensurability issues and associated disciplinary division (De Haas, 2007; De Haas et al., 2014). Migration, after all, is an endogenous, enabling factor in broader transformation processes embodied in the term “development” (cf. De Haas, 2007: 61). Development, therefore, is a prerequisite for return rather than consequence of migration (Ibidem).

2.2.3 Determinants for international and return migration

Corresponding to guiding principles of theories and approaches raised above, major factors influencing emigration decisions are the following major factors broadly discussed in literature (e. g., Cieřlik, 2011; Zaiceva and Zimmermann, 2016; Stark, 2019; Mohamed and Abdul-Talib, 2020):

- absolute or relative poverty at home,
- income inequalities between home and elsewhere,
- credit policies, tax, and social security system benefits (e.g., unemployment, pension etc.),
- political settings and policies,
- ethnic realities (level of security, discrimination etc.),
- personal ability and willingness to move, quality of life, wellbeing, and happiness,
- job opportunity awareness, destinations, distances, cost, contacts, or networks,
- educational and personal developmental opportunities (“going somewhere higher in life”),
- information access, family reasons (reunions, love, marriage, child education etc.).

Moreover, occupational thinking is an important factor within the migration selection process (Akhurst et al., 2014). The decision to migrate abroad and occupation of choice is usually made before the actual move, i.e., based on destination-specific factors such as location, distance, opportunities and network availability or skill application and skill developing (Kamninga et al., 2020). The modern migrant does not only migrate between (international) destinations but between industries and occupation, exhibiting the self-selection process in which competitive alternatives are weighted (Ibidem). Since human behavior is not mechanistic, migration does not happen black or white for one or the other reason but is result of a rather thoughtful decision process derived from subjective perception, personal aspiration, individual, family and household capabilities as well as concrete opportunity structures at specific points in time (De Haas, 2011; Cieřlik, 2011;

Constant, 2020; Mohamed and Abdul-Talib, 2020). Moreover, the decision into migration is influenced by the individual's level of risk propensity (Kushnirovich et al., 2017).

Through an inner decision process of human development, migrants, most important, select themselves into migration because as rational market participants, they make optimized decisions about whether, where, when, and how to participate in a (ready) market (Bijak, 2006; Wang and Fan, 2006; Constant, 2021). Those who, in anticipation of high migration cost associated with host country assimilation, choose not to migrate will stay as migration will then not bring the expected return on investment (De Coulon and Piracha, 2005). Those who, at the end, decide for migration are 'more' motivated, ambitious and well-resourced but also equipped with 'more' aspiration, with 'more' skills and capabilities and see 'more' opportunities compared to the average non-migrant who does not possess this 'more' (Cattaneo, 2007; Anacka and Okólski, 2010; Karpestam and Andersson, 2019; Karolak, 2020; Feliciano, 2020: 317).

Moreover, the migrant is less risk averse, 'more' open to experience and looking for non-standard approaches. All these traits are also associated with being entrepreneurial (Vārpiņa et al., 2023). Due to these positive characteristics, the migrant is positively selected into migration which allows for earning higher wages abroad (Whaba, 2022). The greater the obstacles into migration are, e.g., distance, cost, immigration laws, culture, language etc., the greater the conscious effort is to actually migrate, i.e., the more selective migration becomes (cf. De Haas, 2010: 17). Respectively, a migrant's behavior is distinct from that of non-migrants (Wahba, 2015a), particularly with regards to the measurable observable and hardly measurable unobservable characteristics (Batista et al., 2014; Gunewardena and Seck, 2020). Despite, a self-employed, however, might still migrate because his business was unsuccessful at the home country (Brück et al., 2018).

Once decided into migration, migrants aim to maximize utility from their decision (Constant and Massey, 2002). As time progresses, migrants constantly face the dilemma of choosing to stay or to return (Constant and Massey, 2002; Cieślík, 2011). However, return migration differs from first-time migration: returnees are even 'more' prone to move again due to prior migration experience, they have 'more' accurate information about the involved countries with regards to wage distribution, language, culture, or social realities etc. (Debnath, 2016; Kindler, 2018; Karolak: 2020).

Repeated visiting home during migration enriches the ‘more’ as it re-strengthens respective relationships, cultural ties, and identity but also allows to check on future career development, investment opportunities, and business developments, all in advance of a (permanent) return at some point in time (King and Christou, 2011). Accordingly, the respective migrants gather specific information and resources to be able to prepare for another self-selection, namely into return (Debnath, 2016). Consequently, returnees in fact exercise a double selection based on a first selection process prior in time with less experience and thus increase migration complexity (Wahba, 2015b; Constant, 2021), including statistical capturing (Vārpiņa et al., 2023). Selection into return is then not just a question of yes or no but also a question of when or to which geography within the home country. Length of stay is an additional decisive factor with regards to selectivity as the relationship between migration duration and return premium is non-linear, i.e., increasing up to a certain point in migration time, and then decreasing (Wahba, 2015a).

The migrant’s reference point about whether to settle permanently abroad or to (partially) return home is the comparison of the state of the home country at the start of migration to the state when the migrant (intends to) return (Dustmann, 1996 a; Cieřlik, 2011; Debnath, 2016). Often, the migrant keeps applying constantly this comparative, re-assessing perspective (cf. Cieřlik, 2011: 1380) based on individual pre-migration and during-migration experience (Drinkwater and Garapich, 2015). Moreover, the higher the wages aboard remain, the longer the migrant would want to stay, however, the marginal and subjective value of the migration gain decreases over time forming return anticipation while still abroad (Wahba, 2014). Since return intensities are U-shaped (relationship between immigrant earnings as a measure of migration success and return), high return intensity is shown for the lowest-income groups, followed by low- and high-income groups (Bijwaard and Wahba, 2014; Wahba, 2015a; Wahba, 2021; Constant, 2021). Additionally, while the unsuccessful immigrants are more likely to leave than the average immigrant and are also more likely to return early in the migration cycle because of failure, successful immigrants might stay due to above-average skills (cf. Wahba, 2022: 27). Alternatively, they are likely to leave than the average immigrant but they do so because they have achieved their financial migration targets (cf. Wahba, 2021: 6). Furthermore, future income streams in the home and host country influence return timing which are highly affected by uncertainty (Wahba, 2015b). The larger income differentials between home and host country are or remain, the more likely uncertainty has a positive

effect on migration duration though the level of perceived risk about the home country labor market relative to the host country labor market influence these decisions (ibidem). Perceived uncertainty relates to anxiety humans possess towards the feasibility of business opportunities due to difficulties in measuring and deriving actions from it. This is different to calculable risk that is easier to handle through informed decision making (cf. Bai et al., 2021: 9).

Finally, for the economic migrant return takes place once the economic benefits of staying abroad decreased to an unsatisfactory price level, i.e., economic benefits have become lower than the cost of staying abroad for another time unit (cf. Wahba, 2015b: 6). Furthermore, return happens when the present value of the expected discounted net return is positive, thus reaching utility maximization (Constant, 2021). When no longer being able to reach desired financial targets also causes individuals to return (Wahba, 2015b; Battistella, 2018; Bijwaard and Wahba, 2023). A successful return then reduces uncertainty which is with regards to returnee entrepreneurs closely linked to their business and knowledge deployment upon return and therefore economic development of the home country economy (Bai et al., 2021). In many cases, though, non-economic factors may prevail even in cases of widening wage gaps (Constant and Massey, 2002; Cieřlik, 2011; Constant, 2020) which may be difficult to exhibit in empirical analysis.

Many scholars have also explored extensively on reasons of return migration but it is hardly possible to obtain a 360 degree vision of reasons for return, as such the following reasons are considered major return reasons (e. g., Gmelch, 1980; Richmond, 1983; Dustmann, 1996a; Gibson and McKenzie, 2009; De Coulon et al., 2013; Garcia-Pereiro and Biscione, 2016; Kobayashi, 2019; Filimanou and Mika, 2019; Nadler et al., 2019; Pauli, 2021):

- increasing purchasing power at home, preference for home consumption, relative prices,
- utility of human capital upon return in the home country established by emigration,
- asymmetric host information that divides migration waves into stayers and returners,
- personal circumstances such as family back home, social rank, matching the marriage market, receipt of inheritance, costly separation, homesickness, frustration, identity, sickness etc.
- shocks at home for which a migrant's presence at home is required,
- shocks at the host country: declining economic growth causing increasing unemployment,
- changing host country political landscapes to the negative (legal restrictions, perception etc.),

- lack of host assimilation and integration, lack of language knowledge,
- structural improvements of the home country labor market and economy,
- return incentive programs, or the wish to simply come back home (nostalgia).

Upon return, returnees are said to be economically more active than the general population, but they might be also more unemployed because of a rest before the next take off, depending on a sustainable earnings situation upon return (White et al., 2018; Brück et al., 2018). Specifically, returning home to increasingly developing countries might seem odd in the first instance as due to lower wages, lower standards of living or institutional uncertainty – however, a preference, responsibility, or a must to live in that country where the family or social network are located seem to be decisive drivers (Wahba, 2021; White, 2022). Also, continued economic growth and perspective are distinct pull factors as more and more (profitable) opportunities are expected to be found, but also high rates of entrepreneurial activities at home may encourage return (Wahba, 2015b; van Stel et al., 2014). Return is specifically an option when higher returns from self-employment at the home country are expected in the long run (Hausmann and Nedelkoska, 2018).

Return, overall, becomes a complex situation as the returnee has developed hybrid identity of more than one culture (Van Houte and Davids, 2008). Reintegration into one's place of departure can therefore be challenging, especially when due to political, societal, or economic changes over migration times, the home country has become a place that may no longer be the home it was at the point of departure (White, 2010; Wahba, 2015b; Goździak and Pawlak, 2016). Furthermore, though returnees have lived in the home country earlier, upon return they may experience reverse-cultural shocks, but they also need to unlearn their migration experience and relearn newly established and to some degree unknown rules and norms which may create uneasiness. They may, in fact, underperform compared to locals (Mreji and Barnard, 2021). The returnee bears the “liability of returnee” (Bai et al., 2021: 3). Functioning networks contribute to risk diversification, facilitate utility maximization, lower cost of migration and reintegration (Constant, 2021). Building and maintaining relationships at all times is critical in reducing liabilities and in managing uncertainty back at home (Bai et al., 2021).

It is, ultimately, the multiplicity and intensity of the above factors that trigger the subjective extent to migration, its duration and about whether to continue to stay abroad temporarily or for good, to return for good or to remigrate (Drinkwater and Garapich, 2015; Cieřlik, 2011; De Haas et al., 2014). Migration intentions change over migration time as migrants while abroad undergo a process of adaptation to changing individual and structural conditions related to both the home and the host country (Ciřkowicz et al., 2007; Brzozowski and Coniglio, 2021). “Altogether this yields a more comprehensive picture of behavioral causes of migration beyond the basic model of income-maximizing individuals [simply] reacting to wage differentials” (cf. De Haas, 2011: 22).

2.2.4 Effects of international and return migration

Generally, younger, educated emigrants select for ageing host societies which decreases home country unemployment rates and raises wealth for the remaining population (King, 2017), though at the same time misshapes demographics and pension systems in the home country (Marks-Bielska et al., 2015). The latter is, additionally, not able to generate return on education investments and loses fiscal income which slows down economic growth (Smoliner et al., 2013; Marks-Bielska et al., 2015). Furthermore, emigration may not necessarily pull unemployed non-migrants into vacant labor opportunities (Murard, 2019). Areas with high emigration become unattractive, sectors may lose out on irreplaceable workforce (Marks-Bielska et al., 2015). Remittances, however, rise home country consumption for the ones left behind which stimulates production and services as well as creates new jobs, maybe even reducing poverty (King and Kuschminder, 2022).

Through migration, migrants are relieved of their individual unsatisfactory situation such as unemployment or poverty as they earn higher wages abroad that are more worth at home (King, 2017), though they make themselves dependent on migration (Bite et al., 2020). Those with return intentions are more likely to invest in the home country than in the host country (Chabé-Ferret et al., 2016), as according to a recent study about 40 percent of their available earnings are used for investment, another 40 percent for remittances and only 20 percent for current consumption (Bite et al., 2020). Migration savings enable migrants to attain and sustain their lifetime target at home such as buying land, building a house, invest in business or pay for child education (King, 2017). A lower price level in the home country increases the value of accumulated migration savings with

a positive probability of return, and each unit spent at home leads to higher effective real wages in the host country (Adda et al., 2022). Emigration furthermore brightens experiences and horizons (King, 2017). However, there are dangers of migration such as type of job and labor market segment, immigrant perception by the host society, or reintegration challenges upon return (Ibidem). Also, solo emigration of the (male) household head impacts the psychological state of family members, especially children with respect to their adolescence, despite regular visits at home: “partial orphaning” impacts children’s psychological behavior in terms of associations with their own family life later in time etc. (cf. Rokita-Poskart, 2014: 176).

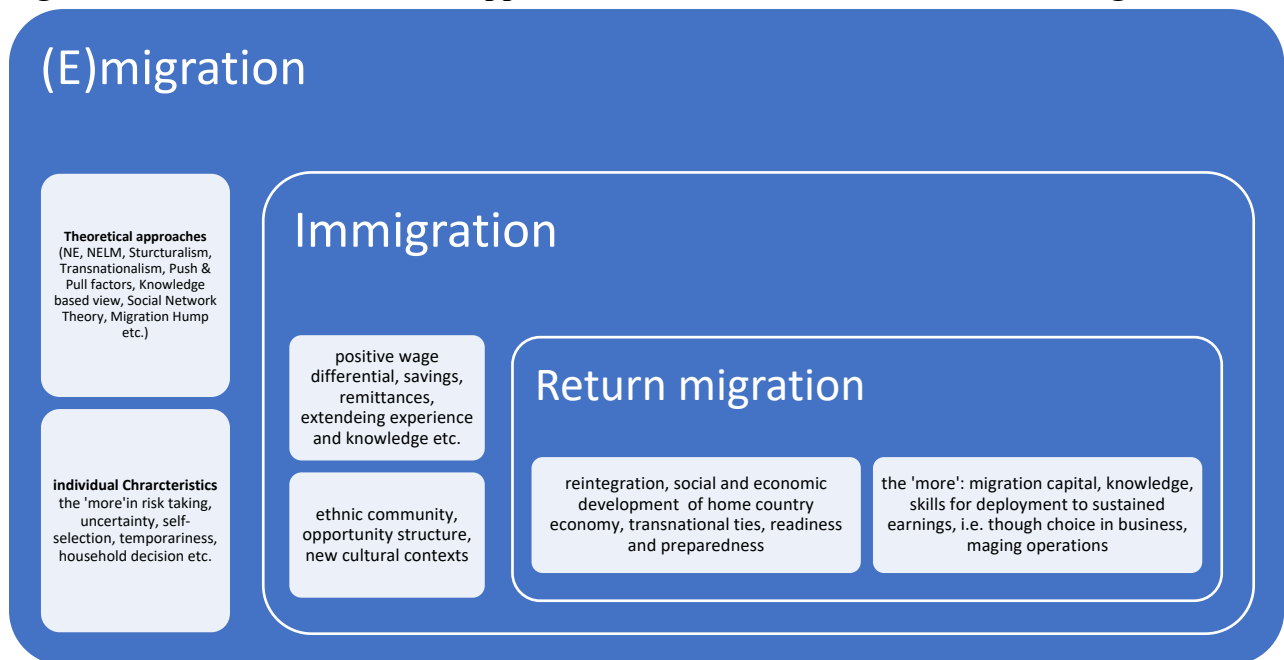
From a host country perspective, a percentage point increase in the share of migrants in adult population in advanced countries may raise GDP per capita by up to two percent (Vercauteren, 2019). Particularly, unexpected migration inflows (shock) shows expansionary value to per capita real GDP (Smith and Thoenissen, 2019). Immigrants fill labor vacancies at the segmented labor market temporarily that the mainstream population does not intent to fill, which, in return, may not necessarily lower host country wage structures or increase unemployment at the host country labor market. As such, immigrants contribute to the host country economy. Should the host country labor market or the attitude towards immigrants change to the negative, return migration will lower rising social tension at the host country (Vercauteren, 2019). Due to temporariness, the host country is relieved of pension payments as migrants leave home for retirement. And because they came after finishing university at home, no education cost arose for the host country (Bite et al., 2020).

The longer the migrant stayed abroad, the longer he was able to accumulate financial, social, and human capital in such quality that it can impact the home country economy (Vercauteren, 2019). Attracting a significant stock of emigrants back, especially those with the strongest ties to the home country, may even out or exceed some of the negative effects of emigration: it balances former labor crowding out effects (cf. Lesińska, 2013: 83; similar Dzięglewski, 2015), levels unfavorable demographics (Fihel et al., 2023), fills labor gaps more qualitatively as the returnees are more skilled allowing for “brain circulation” (cf. Hagan and Wassink, 2020: 12) or “brain-regain” (cf. Vercauteren, 2019: 25). However, this is true when returnees come to areas where migration assets are needed and effectively applied (Smoliner et al., 2013). If not, there might be skill waste (Battistella, 2018). Moreover, returnees bring new forms of behavior (Brzozowski and Coniglio, 2023)

which creates societal wealth but they also bring new ways of production and services that are especially expected by returnees – however, the home society must be willing to absorb these (Marks-Bielska et al., 2015; Bogdan et al., 2015; Wahba, 2015b; Zaiceva and Zimmermann, 2016; Filimanou and Mika, 2019; King and Kuschminder, 2022). Attracting returnees systematically back leads to higher levels of trade and FDI (Naude et al., 2017). Returning to more rural areas of the home country may enhance (local) economic growth when these areas lack e.g., entrepreneurs and returnees fill these gaps (Smoliner et al., 2013; Mejía et al., 202). Some countries establish appealing (national and regional) policies and (costly) initiatives that enhance a growth-oriented development from return migration (Filimanou and Mika, 2019), while others do not or not enough. The latter is true because the effect of providing such incentives “is still somewhat ambiguous” as it is still not fully clear from research whether return migration is a true (measurable) economic growth accelerator (cf. Debnath, 2016: 17).

The below figure presents the main features of return migration that are applicable to this dissertation. Return migration, respectively, is truly embedded in the broad context of emigration and immigration, and thus forms the end of one migration circle. Return migration is the consecutive event that follows emigration and immigration and is thus no stand-alone, detached process.

Figure 1: Overview of theoretical approaches and influential factors to return migration



Source: own elaboration

3 Theoretical aspects to entrepreneurship in context of return migration

Among scholars, there are no finite agreed definitions on the concept and terms concerning entrepreneurship (Iversen et al., 2007; Murphy, 2009; Kobia and Sikalieh, 2010; Wach, 2020; Arend, 2020; Bafera and Kleinert, 2023). To the focus of this dissertation, three interrelated elements of entrepreneurship have evolved: an individual's decision into business, how to remain in business, and how to sustain its long term success (Bates, 1993). Identifying respective circumstances is one way to explain entrepreneurship phenomena (McFarlane, 2016; Marjański and Sułkowski, 2021; Szarucki et al., 2016). Scholars such as Bednarzick (2000) argue that there is a positive relationship between entrepreneurship and economic growth (Smith, 2010). However, the search for which factors influence economic growth sustainably has to date been one of the most important research questions (Smith, 2010). Though markets get transformed (Croitoru, 2019), influencing variables are not yet fully discovered (Block et al., 2017). The role of migration as an influencing factor is rather new in this research (cf. Bhattacharya and Moffitt, 2013). Respective dependencies can be empirically analyzed through statistical approaches (Wach, 2020). Moreover, studying societal environments of entrepreneurship in certain geographies (e.g., countries of migration origin) extends entrepreneurship theory (cf. Ireland et al., 2008: 124). Overall, micro level analysis is essential for research (cf. Davidsson and Wiklund, 2001: 14).

In what follows is the elaboration on the understanding of who returns and what to expect from returnees with regards to occupational choice into entrepreneurship upon return to their home country: the chapter develops from 1) general and local, to 2) immigrant and to 3) returnee entrepreneurship. A helpful approach in this respect is contextualization as entrepreneurship is embedded in time and space (Shirokova et al., 2022). Particularly, there is “historical contextualization” (cf. Wadhvani, 2016: 66; also Tanas, 2007: 4), applicable as the “echoes of the early writers continue to resound in modern economic theories of entrepreneurship” (cf. Parker, 2018: 540; similar Hébert and Link, 1988). The subchapters outline respective research fields, develop definitions of key concepts, and explore determinants for choosing into and staying in business.

3.1 General entrepreneurship

3.1.1 Research field

Entrepreneurship as a field of economic study seeks to understand how profitable business opportunities are spotted, created, and exploited by whom with what consequences, and thus involves the study of the same (Naudé, 2008; Boruc, 2018; Malerba and Ferreira, 2020). The research field has a somewhat 250-year long history, rather scarce until the 1970ies, increasing as of the 1980ies and booming in the early 2000. The (modern) academic field has become known as Economics of Entrepreneurship (Rocha, 2012). Besides extensive studying developed economies, entrepreneurship has increasingly been studied in relation to emerging or developing countries (Gruenhagen, 2018; Grosu, 2015). However, the research field remains multi-faceted and multi-threaded due to “exceptional multidisciplinary” (cf. Wach, 2015b: 25): much scientific works have evolved within economic sciences, including immigrant entrepreneurship (Ramos-Escobar et al., 2022), but also of sociology, however aside from the field of international entrepreneurship which actually focuses on cross border activities (Elo and Servais, 2018). As such, there is no finite clarity related to entrepreneurship theory (cf. Christensen, 2004: 303)

Since about the 1970ies, as a response to the decline of the many large corporations, a departure from the primacy of large firms to the economic unit of small businesses appeared causing a promotion of entrepreneurship (Drucker, 1976 and 1985; Casson and Casson, 2012; Wach, 2015a; Ahmadov, 2020). Economies progressed from regulated and managed economies dominated by the managerial firm that is large scale production based on capital and labor towards an entrepreneurial economy dominated by small(er) companies with a focus on production factors such as entrepreneurial capital and knowledge (Audretsch and Thurik, 2000; Berthold and Neumann, 2008). The knowledge-based economy paradigm arose that required adjustments in industrial structures and economic values. Relatedly, entrepreneurial activities by individuals started to play a key role when analyzing economic growth factors (Audretsch, 2009; Casson and Casson, 2012; Wach, 2015b). The policy-making question shifted from “How can governments encourage companies to exploit market potential?” to “How can governments co-create an environment that fosters the success and vitality of enterprises?” (cf. Wach, 2015b: 33). Specifically, entrepreneurs have been attributed to have ‘more’ ability and ‘more’ incentives to acquire, use and transform

(economic) knowledge effectively into (new) products desired by costumers (Audretsch and Keilbach, 2004). Consequently, their self-employment is crucial for entrepreneurship and growth rates (cf. Berthold and Neumann, 2008: 238), thus of academic interest.

3.1.2 Definition of key terms and concepts

3.1.2.1 Economic theories on entrepreneurship

For clarification and to the focus of this dissertation, economic theories of entrepreneurship may be divided into three different time periods to provide for the desired relationship between an entrepreneur, economic development and growth of a given economy: The classical theory (1776 - 1870), neo-classical theory (1880 to 1910) and the Austrian market process theory (since around 1870) (Khalil, 2006; Formaini, 2001).

The classical theories of entrepreneurship (representatives e.g., Smith, Ricardo, Marx) focus on the virtues of free trade, competition and specialization with the role of an entrepreneur relating to the production and distribution of goods in a competitive marketplace. However, there was limited distinction between the entrepreneur and the capitalist (Formaini, 2001). The economic problem was defined in terms of the production of surplus: Resources are available in heterogenous qualities, different gradations of quality or different proximity to a desired location but these resources are not as scarce (Khalil, 2006). To create growth, the individuals (agents) work productively and abstain from luxury consumption to effectively reach out to lower quality resources. The goal is to apply productive capacity (or means of production) on natural resources to make less available resources ready for consumption, though under cost covering scenario. Growth then takes place on a replicative scale. However, the agent may invent a new technology that improves on the method of production leading to greater output per input, i.e., he innovates at will to gain surplus and he does so by investing from actual surplus into R&D. However, the assumption that humans are driven to accumulate surplus or to innovate is based on “an essentialist, self-actional view” to explain entrepreneurship, ambition, or internal motivation by assuming these, and this limits the explanatory power of the theory (cf. Khalil, 2006: 9-13).

The neo-classical theories (including such scholars as Walras or Menger) emerged out of criticism against the classical theories and defines the economic problem in term of efficiency (Khalil, 2006;

Formaini, 2001). In essence, the impact of diminishing marginal utility and entrepreneurial response to them was emphasized: Resources are in fact scarce and the agent can only decide how to make the best out of them, i.e., efficiently and most satisfactory use or allocation out of given resources in such a way that the satisfaction received from the expenditure of the last monetary unit on each good gives an equal amount of satisfaction (cf. Khalil, 2006: 7). This can be expressed mathematically through the maximization of the utility function under income constraint which applies to both an individual (consumer) and a firm (entrepreneur). When considering the firm, input factors are applied at minimal cost as a firm can control input cost but not how much units it sells or at which price. Importantly, a firm can produce in different ways without technological innovation. This is because the underlying action is mechanistic: both players react to a stimulus such as price change but this does not imply innovation or creativity, the latter coming from external shocks outside the system but the theory does not explain this further (cf. Khalil, 2006: 8-9).

The Austrian market process theories (representatives including von Mises, Schumpeter, Kirzner, Knight) meant to respond to questions that remained unanswered in the neo-classical school of thought: These theories mainly focus on human and not mechanistic actions and these are based on knowledge regarding the economy. Entrepreneurship, respectively, is a developing character trait unique to humans. Those who possess (economic) knowledge, are regarded entrepreneurs. However, entrepreneurship is explained by assuming it (Khalil, 2006).

Despite, the quest for a general equilibrium has remained rather theoretical as in reality, only a current state of affairs can be disrupted by the entrepreneur and again by other entrepreneurs, thus keeping the economy running and therefore, equilibrium and disequilibrium complement each other and are not necessarily opposites. Developing growth rates or speed of growth depend on what these entrepreneurs do in and to the given economy. Respectively, no one else than the individual entrepreneur has been responsible for capitalist progress until today (Formaini, 2001). Only through influencing individual scholarly contributions over time, the role of the entrepreneur has re-received scholarly attention in economics. Respectively, economic growth originates from individual entrepreneurs and from the creation of new firms and new jobs (Rocha, 2012).

As there are no exclusive tools with regards to how to manage individual businesses, different schools of thought have evolved, each with its own notions of understanding of the personal characteristics, business opportunities and their management (Cunningham and Lischeron, 1991; Jons-son, 2017). Specifically,

- the Economic School of Thought (e. g. Chicago, Austrian, German) focuses on the effects of entrepreneurship while studies on the causes of entrepreneurship have dominated by contributions from i.e., sociology (society's attitude towards entrepreneurs), psychology (factors affecting entrepreneurial behavior), or biology (genetic research in light of being inclined towards risky actions) (Christensen, 2004; Grilo and Thurik, 2008);
- the Entrepreneurial Trait of School emphasizes the characteristics that make an entrepreneur successful: e. g., Great Persons School (entrepreneurs are born), or Psychological Characteristics School (entrepreneurs have unique values and attitudes that drive them);
- The Venture Opportunity School of Thought emphasizes opportunity recognition and development: Classical School (innovation and creativity are key success factors), The Management School (entrepreneurship can be taught and learnt) or The Leadership School of Thought (entrepreneurs are leaders and managers) (Kuratko and Hodgetts, 1998; Cunningham and Lischeron, 1991).

Connectedly, there are four theorizing mainstreams (Gedeon, 2010; Cherukara and Manalel, 2011; Wach, 2015b; Teran Yopez, 2018):

- Economic theories of entrepreneurship according to which entrepreneurship is based on economic incentives (non-fixed profit), individuality (creativity) or independence (from obeying to rules of employment law) which include risk taking and striving for profits, though profit may not always need to be the ultimate goal (as is for the state sector, or nonprofit organizations etc.), or not all businesses are entrepreneurial (Bosman and Fernhaber, 2018);
- Application of Management Theory which analyzes entrepreneurship from a practical point of view, e. g. Drucker (1985) applied management concepts and techniques as key to the creation of something new to manage entrepreneurial risk taking;
- Influence from the field of sociology, as the study of the relationship between group characteristics and entrepreneurial activity, by e.g., Sombart (1911) and Hoselitz (1963) who stated

that ethnic or social minorities show high level of entrepreneurship, or by Weber (1921) who emphasized that religious principles are part of culture and thus influence people's life;

- Influence from the field of psychology, focusing
 - a) on the causes of entrepreneurship, e.g., McClelland (1961, "Trait School") for whom entrepreneurial activities are not guided exclusively by economic attributes but by cultural values or personal characteristics, e.g., expressed by needs for achievement (personal accomplishment); respectively, further research on entrepreneurship evolved with regards to:
 - The unit of analysis: concerning the founder, the team, or the firm
 - The entity that is being entrepreneurial and its environment:
 - *Opportunity-driven* entrepreneurship by which individuals identify profitable business opportunities and benefit from specific market context, they develop business by career choice;
 - *Necessity-driven* entrepreneurship by which external factors force individuals to adopt to entrepreneurial behavior, entrepreneurship is the only choice to earn a living;
 - b) on the process of pursuing opportunities leading to articulating various stages of entrepreneurial activity including emergent, newness or transformation, e.g., Gartner (1989, "Behavioral School").

Additionally, considerable economic studies encompass mainly three fields: labor economics theories of occupational choice (who acts and why and causes; traits of human action), microeconomic theories of innovation (how disruptive innovations shape markets; processes and management), and macroeconomic theories (of innovation, economic growth, business cycles etc.) (Parker, 2018; Rocha, 2012; Wach, 2015b). They link characteristics like gender, age, education level, (previous) work experience, family history or human and social capital to the unit of an individual starting business (Audretsch et al., 2015). Specifically, and related to theory on occupational choice⁵, a decision into self-employment is today still based on income maximization rather than

⁵ The conceptual framework on the theory on occupational choice relates to scholarly work of e.g., Frank Parson Trait and Factor Theory/1909, Ginzberg, Ginsburg, Axelrad and Herma Theory 1951; Anne Roe Theory on Personality/ 1956; Donald Super Self-Concept Theory on Career Development/1957; John Holland Theory on Vocational Personalities in Work Environment/ 1969; Lent, Brown and Hackett's Social Cognitive Career Theory/1987; Dawis and Lofquist Theory on Work Adjustment/ 1984, 2002, 2005 (Arthur and McMahon, 2018).

e.g., out of unemployment (Jacobs, 2007). Extended findings by Sorgner and Fitsch (2013) suggest that the occupational choice of future entrepreneurs at the time of labor market entry is guided by a taste for skill variety, the prospect of high earnings, and occupational earnings risk.

3.1.2.2 Entrepreneur

As early as the 14th century, the original French term “*entrepredeur*” (“undertaker who makes things happen” = change) appeared and has ever since been adjusted to market and politico-economic changes, providing roots for confusion by vague or inexact translation (cf. Tanas, 2007: 47). The undertakers assumed risk, responded to incentives, initiated new ventures, innovated, or practiced rent seeking which are characteristics associated with the contemporary entrepreneur. Up to the 17th century, they were distinguished from the merchant adventurer who undertook trade with significant risk, e.g., across the oceans (Jonsson, 2017). Although since medieval times monarchs, kings, the church, or merchants all had engaged in activities showing risk, innovation, and judgement (Casson and Casson, 2012), it took until the industrial revolution of the 18th century that “the modern multi-faceted image of the entrepreneur” was produced (cf. Ricketts, 2008: 3).

Due to related modernization processes, new ways of economic thinking and productive logic allowed to transform from a feudalism to a capitalism economy with the “heroic” industrial entrepreneur becoming the central as well as the innovative link between pre-industrial times of the late 18th century and industrial maturity of the 20th century (cf. Boutillier and Uzunidis, 2014: 11), although innovation, initiative and creativity, “go back to the dawn of humanity” and are not outcome of the industrial age per se (cf. Jonsson, 2017: 17). From the early 19th century on, less importance was given to the entrepreneurial role in economic theory because there was no longer room for an individual as “production was a given” (cf. Tanas, 2007: 52), previous scholarly works misrepresented, ignored, or not understood, partially until today (Faltin and Ripsas, 2011; Rocha, 2012; Brown and Thornton, 2013). The revival of the role of the entrepreneur as of the 1970ies was reflected in its explicit incorporation into economic modeling, mainly in models of occupational choice problems in labor economics of developed countries (Jacobs, 2007; Rocha, 2012).

Looking at seminal influencing contributions, classical French businessman Cantillon (1680-1734) presented his ideas on entrepreneurship (1755) by emphasizing the term “entrepreneur” in light of

methodological and systematical analysis of economic features of human action, establishing “the entrepreneur as a central figure in the marketplace” (cf. Hébert and Link, 2006: 589). He is an intermediary between landowners and hirelings who actively self-engages in free exchanges of profits due to market discrepancies in demand and supply: buying at a fixed price and selling later for a yet uncertain price somewhere else with the difference being unpredictable profit or loss, which means uncertain and no fixed income (Nagarajan, 2011). The alert entrepreneur risks activities by effective supply and merchandising of existing goods and by arbitrage that is profitable trade between the countryside to bigger towns if transportation cost were covered (cf. Hébert and Link, 2006: 590 and similar cf. Parker, 2018: 541). The arising profit is to the risk taking individual while safe wages to the hirelings are result of decision-making by the entrepreneur (Brown and Thornton, 2013). His role and responsibility are to bring the two sides of the market together under full risk bearing and uncertainty (Boutillier and Uzunidis, 2014; similar Parker, 2018; Rocha, 2012). Consequently, the successful entrepreneurs survive while the others disappear from the market (Brown and Thornton, 2013; Parker, 2018). Innovation of the new is, however, not his role (Jonsson, 2017). In the 1920ies, Frank Knight will echo Cantillon’s views (Nagarajan, 2011).

Baudeau (1730-1792) developed Cantillon’s notion of an entrepreneur by introducing the function of the entrepreneur of innovation: his entrepreneur overtly applies new techniques and ideas to reduce cost to raise profit. This is based on ability: collecting and processing of information and knowledge by the active agent who, at times of economic event (harvest), may or may not have control over such events. Those events under control depend on his knowledge and ability which he combines creatively to reduce risk (innovation); at those not under his control, he places himself at full risk with little potential to innovation (Hébert and Link, 2006).

For Say (1767 – 1832), building on Smith (1723 – 1790) the entrepreneur, a rare and indispensable individual, was the main agent of innovative production with good judgmental abilities from producing new knowledge and skills to enable success but causing failure in lack of these (van Praag, 2003; Iversen et al., 2005; Pomianek, 2018). Explicitly, the entrepreneur has to manage a shifting of resources geographically from low to higher productivity areas, and thus creates value for others (Gedeon, 2010; Bosmann and Fernhaber, 2018). Such trade creates (new) opportunities and challenges not just in one industry but also in related other industries or even the society at large since

all markets are connected through trade. Say goes beyond Cantillon by stressing the managerial role of the entrepreneur as the entrepreneur changes the nature of products and processes and thereby transforms and disrupts the economy (Jonsson, 2017). Clearly, it “foreshadowed Schumpeter’s creative destruction and there is little doubt that Say’s discussion of the entrepreneur imbued the very term with new meaning” (cf. Jonsson, 2017: 22). Unlike Cantillon’s, Say’s entrepreneur by profession then brings novelty but at the same time uncertainty into the economy, and therefore holds a critical position within it (Boutillier and Uzunidis, 2014). As the entrepreneur fully owns or controls his business, he must input some of his own capital (Jonsson, 2017). His reward is then not as much from bearing risk (as the capitalist) but rather from applying a scarce type of labor and thus it is similar to wage (Iversen et al., 2005). Jonsson (2017) does not share this view: Say’s entrepreneur got rewarded for risk taking and this cannot be simple wage.

Classical English (British) economists regarded the entrepreneur more as government contractor (“undertaker”), a supplier of financial capital, a rational, modest and cautious agent of slow but steady progress (Smith 1723 - 1790) or as an agent of economic progress (Bentham 1748 - 1832), yet overall, there was a “sterile notion of entrepreneurship” at the time (cf. Nagarajan, 2011: 241; similar Tanas, 2007: 51). Bentham (1748-1832) elevated the capitalist and not the entrepreneur to the top of the economic hierarchy (Hébert and Link, 2006: 591). Entrepreneurship was understood as the study of human actions that may lead to (social) changes (Michael, 2007).

Following Smith, Ricardo (1772 – 1823) focused on the three (production) factors land (nature), labor and capital that received reward in form of pure rent, wage, and profit and on how created wealth can be distributed within a society; trade was productive if the entrepreneur reinvested profit into trading activities (Ricketts, 2008). Respectively, it is more the confidence in an entrepreneur’s self-interest than public interest that provides opportunity for maximum profit to such entrepreneur (Hébert and Link, 2006).

For Marx (1818 – 1883), the bourgeoisie contributed through (physical) work to technical progress and should be (solely) rewarded, however, thus becoming the risk bearer. There is no entrepreneur but a “capitalist” who must keep up production to continuously accumulate capital for economic survival, a process which may drive innovation (Boutillier and Uzunidis, 2014; Formaini, 2001).

The fewer, however, that survive in this capital accumulation spiral, the larger firms are created that take over control, and the longer this transition process lasts the more the state replaces capitalist forms of work by a centrally managed economy causing disappearance of the free market along with uncertainty, risk, prices, etc. (Boutillier and Uzunidis, 2014).

Other German writers extended on the (British) classical and advanced theory (Formaini, 2001: 4). They distinguished between capital provider and entrepreneur, the latter equipped with risk taking traits that to a certain extent cannot be lifted fully through means of insurances (Hébert and Link, 2006 and 2009; Nagarajan, 2011). Risk propensity is understood as the tendency to take actions that one judged to be risky. The deriving ability to calculate risk is then an important success factor and strengthens entrepreneurial orientation (Kushnirovich et al., 2017). Von Thünen (1785-1850) established an entrepreneur who spends sleepless though productive nights thinking of how to avoid business failure, different from employees (managers) who rest after a full duty day: “necessity is the mother of invention” (cf. Hébert and Link, 2006: 592). Respectively, wage-earners bear little risk about that the products will not be sold (Berthold and Neumann, 2008). Consequently, the entrepreneur (and not the capitalist) is both risk taker (Cantillon) and innovator (Badeau, Bentham) at the same time with a residual as reward for risk-taking and ingenuity (Hébert and Link, 2006; McFarlane, 2016). Van Mangoldt (1824 – 1868) distinguished production on order with fixed income and production on the market burdened with risk related to the uncertainty of changes on the market (Pomianek, 2018). Time now played a role: the longer the productive process goes on, the longer uncertainty and risk influenced the entrepreneurial function (Tanas, 2007). He was forerunning Knight who distinguished risk from uncertainty (Formaini, 2001).

By the late 19th century, neoclassical views arose with a focus on mathematic and scientific precision, emotionless resource allocation and hard pricing decisions with almost no more place for the (human) entrepreneur but for optimizing behavior by firms and consumers (Nagarajan, 2011; Iversen et al., 2007; Boutillier and Uzunidis, 2014). Marshall (1842 – 1924) neglected the role of the entrepreneur (Formaini, 2001: 6) as he considered land, labor, capital, and the firm as factors of production, coordinated through an organizer who commands over general or specialized abilities and knowledge that influence business development (Iversen et al., 2007; similar Ricketts,

2008; Karlsson, 2004; Tanas, 2007; van Praag, 2003). The (innovating) entrepreneur seeks continuously to minimize cost and thus moves the cost curve (Iversen et al., 2007).

Walras (1834 – 1919), contrasting Cantillon, removed the “visible” entrepreneur explicitly by introducing a sterile, purely rational (invisible) entrepreneur (auctioneer) “who bends without resisting to the market conditions through the price mechanism”, with the firm and the production imposing on one another (cf. Boutillier and Uzunidis, 2014: 16; similar Nagarajan, 2011; Cassis and Minolglou, 2005). An (ideal and rather unrealistic) model of pure and perfect competition evacuates risk and uncertainty. The function of the entrepreneur became a service given free of charge (Boutillier and Uzunidis, 2014) or a production factor as arranging production was not regarded entrepreneurial and thus rewarded by wage and not profit (Formaini, 2001). Though Walras had distinct understanding of the entrepreneur, it did not reach scholarly attention at times of creating the modern equilibrium system which is, at the end, only established by the auctioneer (Ibidem).

Menger (1840 – 1921), in contrast, focused on situations in disequilibrium (and thus uncertainty) with economic progress depending on development of tacit knowledge by the entrepreneur to reduce uncertainty and to develop on the dynamics of social networks when interacting with individuals which, at the end, leads to spotting business opportunities (Boutillier and Uzunidis, 2014).

For American economists, such as Hawley (1843 – 1929), the entrepreneur converted into the owner of a firm where the source of all economic activities take place (Tanas, 2007).

The German School of Economic Thought insisted on understanding a man’s behavior and constraining institutions, i.e., human motives and behavior had to be explained through more psychologically realistic terms (Hébert and Link, 2006) such as “purposeful, human action” vs. “mechanistic processes” (cf. McFarlane, 2016: 20). Schmoller (1838-1917), respectively, established the unique central factor of “enterprising spirit” that allows for a creative organizer to innovate and initiate new projects through imagination and daring (cf. Hébert and Link, 2006: 593).

The fellow German Historians (Sombart 1863-1941 or Weber 1864-1920) extended such view by rational entrepreneurs that combine powers of organizations (social systems) through certain

personality and ability to elicit maximum productivity from engaged individuals in the production and innovative change process (Hébert and Link, 2006; Croitoru, 2019). The underlying entrepreneurial process meant breaking away from old (industrial) methods of production (Fordist view) towards the creation of new ones (so-called post-Fordist view), and this disequilibrium process bring out new social systems such as free market systems through change (Ibidem). In Weber's view, the critical success factors contended that entrepreneurial growth depends upon the ethical (religious) value system of the society concerned in which entrepreneurs operate (cf. Hébert and Link, 2006: 594). He conceptualized rational individuals as acting according to their subjectivist interpretation of social context with profit in return for "systematic activity developed on vibrant principles" (cf. Croitoru, 2019: 39) and is thereby distinct to a centrally planned economy (Parsons, 2019). Moreover, it is the entrepreneur at will who leads the market through focusing on lucrative opportunities, and through his doing ("calling") there is change, e.g., in outcome. He benefits from business opportunity but also creates these through new needs or influencing social trends of consumption through marketing (Ibidem). Most particularly, the ability to actually break social values is more frequent among marginal and minority groups (e.g., immigrants, cf. Campagnolo and Vivel, 2012) due to their ambiguous situation (Hoselitz, 1963; Cherukara and Manalel, 2011).

Regarding economic theory building, the seminal increment are the contributions of Austrian Joseph Alois Schumpeter (1883-1950) (cf. Iversen et al., 2007: 7). He broke sharply with these neo-classical views towards an inherent disequilibrium nature of market dynamics in which entrepreneurial activity is almost identical with new (technical) innovation and not risk bearing or simple managing of (routine) operations (Freitag and Thurik, 2006; Parker, 2018; Nagarajan, 2011). Respectively, the creation, identification, application and carrying out of new combinations of (new) products, processes, qualities, markets, sources of supply, organizations etc. is the essence of successful entrepreneurial tasks and results, and effective leadership to profit from these is the appropriate reaction (Iversen et al., 2007; van Praag, 2003). Through revolutionary innovation and how these can be applied (Rocha, 2012; Parker, 2018) rather than (endless) capital accumulation, small-scale productivity or simple knowledge inventing, the market positions of the competitors are undermined to advance the economy (Ricketts, 2008: 8). In contrast to Walras' rational entrepreneur of equilibrium, Schumpeter's rather irrational entrepreneur actively shifts in a risky environment the production function through creating new ones, and thus becomes the disequilibrating force

for economic development and is, therefore, solely responsible for rise and decay of capitalism by disrupting deliberately and creatively the economy *out* of static equilibrium (cf. Ricketts, 2008: 8; similar see also Rocha, 2012; Acs et al., 2016; Croitoru, 2019). Capitalism then enables economic change (Boutillier and Uzunidis, 2014) and is (to date) crucial for vitality of capitalist societies and market economies (Cassis and Minoglou, 2005; Naudé, 2008; Stam and van Stel, 2011).

Innovations transform markets by reducing uncertainty through a temporary power of monopoly (cf. Boutillier and Uzunidis, 2014: 10). They are therefore a “precondition for [the quality of] entrepreneurship and economic growth in capitalist societies” (cf. Tanas, 2007: 113; similar Pomianek, 2018). It is the motivated individual by will and not intellect that “earns his profit, however temporary, from successful innovations” (cf. Hébert and Link, 2006: 594). Only as long as this individual continues to innovate there is competitive advantage leading to profit and thus economic growth (Hébert and Link, 2006; Parker, 2018; Szymura-Tyc, 2015; Cassis and Minoglou, 2005; Croitoru, 2019). Consequently, “Schumpeter means entrepreneurship” (cf. Rocha, 2012: 5; similar McFarlane, 2016), and the following years saw little progress in theory building because “Schumpeter said it all” (cf. Formaini, 2001: 7). However, it remains unclear what characteristics his innovative entrepreneur encompass (cf. Block et al., 2017). Moreover, defining “new” is non-trivial as it is relatively subjective, but also subject to convention and to term delineation concepts on international and national level - thus difficult to capture statistically what is entrepreneurial activity and what not, or who is considered an entrepreneur and who not (Ahmad and Hoffmann, 2007).

Similar to Cantillon, Knight (1885 – 1972, Chicago School), re-established the entrepreneur as a “key figure in the economic system” who reduces risk and uncertainty in an economy (cf. Cassis and Minoglou, 2005: 5; similar Dold and Rizzo, 2021). His entrepreneur though must accept and bear consequences of uncertainty that, however, arise from limited information about resources, his own innovation, availabilities, fluctuating sale prices, customer reactions etc. (Iversen et al., 2007) and that cannot be left to a banker or capitalist as Schumpeter saw it (Rocha, 2012; Ricketts, 2008). Entrepreneurship is then the ability to actively take and manage the risk of such market activity (Pomianek, 2018: 74). Uncertainty is a mix of calculable risk which is predictable and insurable and of incalculable uncertainty of the unknowable (Karlsson et al., 2004; Rocha, 2012). What to do and how to implement it is then the primary problem to be solved, including the hiring

of other input for which management (Ricketts, 2008) and leadership activity are needed (Iversen, 2008). To be successful requires powers of effective control, intellectual capacity, and self-confidence from a venturesome and foreseeing entrepreneur; the better the predictions, the more successful he becomes (Van Praag, 2003). Knight's entrepreneur plays the functions of exercising responsible control and securing the owners of productive services against uncertainty and fluctuations in their incomes (Thurik and Grilo, 2008). The provider function answers the question of occupational choice, especially by the more able ones (e.g., Lucas, 1978; Lazear, 2005) while the risk-bearer function provides the necessary attributes to occupational choice into entrepreneurship (Kihlstrom and Laffont, 1979; Thurik and Grilo, 2008: 5). Therefore, "Knightian entrepreneurship is closely connected to owning a business" (cf. Iversen et al., 2007: 9).

Once a Schumpeterian entrepreneur settles down to run such (routine) business just as any other businessman, he is no longer a Schumpeterian entrepreneur (cf. Parker, 2018: 542). He ceases to be an engine of growth once the economy converges towards equilibrium, but such "routine" entrepreneur is by no means useless (Hbert and Link, 1988; Karlsson et al., 2004; Boutillier and Uzunidis, 2014). This is because the "movement from disequilibrium to equilibrium is nothing but the entrepreneurial-competitive process" (cf. Ricketts, 2008: 9) that takes place even if there is no new information (Cassis and Minoglou, 2005; McFarlane, 2016). Kirzner (1930- , Austrian School of Economics) emphasizes such driving role of a more managerial than pure innovative entrepreneur. Such entrepreneur is more of an active agent (bargainer, price setter, arbitrageur) that generates profit by bringing the economy back towards equilibrium when coordinating and distributing products. He drives the market by spotting profitable opportunities *from disequilibria* through cognitive traits of "alertness to disequilibrium" "preparedness", and "spontaneous learning" (cf. Karlsson et al., 2004: 5, 6, 7; cf. Parker, 2018: 541; cf. Rocha, 2012: 8; cf. Ricketts, 2008: 6).

With a focus on competition and market processes, profit is reward for both taking the chance to discover and being able to anticipate how individuals will react to change (Boutillier and Uzunidis, 2014). Adjusting prices is the main role of Kirzner's entrepreneur (Gedeon, 2010; Smith, 2010). These small(er) scale entrepreneurs spot opportunities that larger firms overlook, through working alongside them and being alert to price differentials that stem from producing cheaper prices or selling for higher prices later (Casson and Casson, 2012; Smith, 2010). Once realized that the

existing production function has shifted, new opportunities exist and bring change as well as new uncertain situations from which someone else may spot again new profitable business opportunity contributing to economic growth etc. (Boutillier and Uzunidis, 2014; Karlsson et al., 2004; McFarlane, 2016). Moreover, if an entrepreneur fills a niche in the market, the possibility of complementary products or services is created and, as a result, more new entrepreneurial opportunities come into existence (Minniti and Levesque, 2008). The entrepreneur is then an equilibrator within his market and, simultaneously, a catalyst for economic activity and growth (Ibidem), an approach especially applicable to economies in transition (Ahmadov, 2020).

Von Mises (1881 – 1973; Austrian School of Thought) attributes a correctly foreseeing ability of the uncertain future of profit from arbitrage and speculation to an acting entrepreneur (Faltin and Ripsas, 2011; Parker, 2018). In applying reason and experience, he seeks profit by taking advantage in maximum price differences and in doing so, he consciously combines factors of production under the laws of the market such as supply and demand or price mechanisms and of dictations from customers to whom the capitalist entrepreneur must obey to realize desired profits (Boutillier and Uzunidis, 2014). Moreover, opposed to Schumpeter, socialism may not work as input and output are not valued rationally in such societal organization (Formaini, 2001). This was to be done by the entrepreneur as he is the driving force for capitalist processes. Decentralized entrepreneurs minimize the risk of poor choices instead of only one entrepreneur who would make the entire economy suffer by wrong choices (Ibidem).

For Hayek (1899 – 1992), similar to von Mises, entrepreneurs are rewarded by capitalist markets when they show superior judgment but get punished when they are wrong and thus underly a process that rearranges resources continuously in search of greater use efficiency (Formaini, 2001).

Schultz (1902 – 1998), in similar way to Kirzner, argues that entrepreneurship is the ability to deal with situations of disequilibrium, independently when equilibrium will come. In disequilibrium, agents reallocate resources efficiently to achieve higher levels of satisfaction and they do so based on their individual degree of entrepreneurial ability. However, reallocating resources requires time, either through trial and error or by investing in human capital which can be undertaken by everyone, i.e., “entrepreneurship exists in all aspects of life” (cf. Iversen et al., 2007: 11).

To Baumol (1922 – 2017, neo-Keynesian School of Thought), extending on Schumpeter, the supply of entrepreneurship in a society is constant but the outcome depends on the kind of entrepreneurial activity (Bjørnskov and Foss, 2016; Dallago, 2017). Innovation is not just about creating the new but finding creative ways to achieve objectives. In cases, there is a call for productive actions but sometimes also for unproductive or even destructive actions (Jonsson, 2017). Respectively, the quality of institutional environments play a decisive role for the development of entrepreneurship to either be useful or destructive to the society, i.e., questions arose to which activities an entrepreneur allocates his focus: to productive innovation or unproductive/ socially wasteful depredation, crime, or pure rent-seeking (Baumol, 1968; Ricketts, 2008; Sautet, 2013; McFarlane, 2016; Chepureenko and Sauka, 2017: 4). Societies that reward the productive focus grow economically; to handle the less productive side, political and legal factors came into play inhibiting entrepreneurial activity and growth rates, including costly securing property, implementation of a tax system, establishing of different types of laws etc. (Ricketts, 2008). Institutional environments that provide space for human creativity and productive entrepreneurship set conditions “that allow the entrepreneurial pursuit of self-interest to accord with social wealth creation” (cf. Rocha, 2012: 10). Baumol specifically attributed leadership to locating new opportunities and putting them into (productive) societal effect (Gedeon, 2010). Depending on the magnitude of implementation, economies of former communist countries experienced various degrees of success along their transition path (cf. Sautet, 2013: 5). Similar to Marshall, Baumol believes in SME and their innovation potential whereas large enterprises produce incremental innovations (Boutillier and Uzinidis, 2016).

Drucker (1909 – 2005), developing on works of Say and von Mises, focused on creativity when defining the entrepreneurial function. In case of low production, the entrepreneur creatively re-shifts (i.e., “manages”) resources to increase productivity effectively and efficiently, and this needs to be done through innovative business models (Faltin and Ripsas, 2011). The entrepreneur actively looks for change (as an event of discovery), responds to it and exploits it as opportunity (Gedeon, 2010; Bosman and Fernhaber, 2018). In this role, he “innovates in the sense that he can be a founder of a firm” (cf. Dallago, 2017: 10). Innovation may not only be the Schumpeterian innovation but may also come from organizing and managing existing resources, processes and principles and its effective *re*-allocation on demand to satisfy customer need or reduce cost, not requiring new patents or research (Faltin and Ripsas; Szymura-Tyc, 2015). There is a difference

in how a business idea is conceived on the individual's cognitive level and how business advanced after "an iterative process of shaping and development" (cf. Croitoru, 2019: 40). Drucker's view has formed the basis of performance management: wealth accumulation is a sign for business success through the availability of opportunity, luck, personality, and competence (Dallago, 2017).

Hébert and Link (1988) provide for a synthetic definition after having analyzed the entrepreneurs of e.g., Cantillon, von Thünen and Schumpeter (German School of Thought), Knight and Schultz (Chicago School of Thought), van Mises and Kirzner (Austrian School of Thought) which concludes that an entrepreneur is "someone who specializes in taking responsibility for and making judgmental decisions that affect the location, form, and the use of goods, resources, or institutions" (cf. Hébert and Link, 1988: 47). Their view connects historical traits (such as risk, uncertainty, or innovation), accommodates entrepreneurial activities (such as arbitrage, ownership, or resource allocation) and makes clear that the entrepreneur is a person and not an organization (Ibidem).

Shane (2000) states that individuals perceive entrepreneurial processes subjectively, based on knowledge built through prior experiences (Croitoru, 2019). For Shane and Venkataraman (2000), it then complements new information in the discovery of new opportunities for entrepreneurship (Iversen et al., 2007). Knowledge building, moreover, intersects with social environment and embeddedness which complementary set conditions for opportunity spotting and realizing (Croitoru, 2019: 40; Boutillier and Uzinidis, 2016). This applies to solo self-employed (Belt et al., 2015).

Modern Economist Casson (1945-; Behaviour School) extends neo-classical analysis by explicitly including the entrepreneur (Boutillier and Uzinidis, 2016) into theory building, i.e. he builds a "theory of the firm around the personality of the entrepreneur" (Casson, 1982) where the "skills of the entrepreneur are closely linked to the core competencies of the firm" (cf. Casson, 2005: 2). He believes that an entrepreneur is an individual person who performs a specialized role by making informed decisions relative to the coordination of scarce resources such as capital and labor (Pomianek, 2018; Boutillier and Uzunidis, 2014). He drives change by efficient allocation of resources and is therefore an agent of change (Boutillier and Uzunidis, 2014). Like Say's entrepreneur, Casson's entrepreneur applies qualities such as capacity for negotiation, organization, management, and innovation. Moreover, the entrepreneur is socially embedded in his surrounding environment,

Casson emphasizes the influence of non-economic elements that complement a contribute to economic success: network of relationships with the family as a source of information based on knowledge and with the mastery of information which includes efficient resource allocation and profit opportunities, with the magnitude of success depending on the quality and extent of these factors. He further details why an individual may choose to become an entrepreneur: no vacant job, desire for independence, the need for part-time addition to salaried work, or simply (entrepreneurial) will whereas only the last reason provides for a true (innovative) business path while the others serve as a springboard into “being busy”. As such, there is a close link between a wage earner and an (individual) entrepreneur (Ibidem).

3.1.2.3 The contemporary entrepreneurial persona

Though several scholars neglected an explicit, apparent role of the entrepreneur, it is, ultimately, “no one else than the entrepreneur who performs the entrepreneurial function and thus contributes to economic development and growth” (cf. McFarlane, 2016: 22). Individuals, however, encounter a situation from different perspective due to different backgrounds, experiences, values, cultures, and beliefs etc. which causes one individual to detect a business opportunity where someone else would not (Ibidem). As such, a fully accurate picture of who an entrepreneur is cannot be fixed (Ibidem; Virtanen, 1997; Rona-Tas and Sagi, 2005; Boruc, 2017).

As the scholarly entrepreneur “has worn many faces and played many roles” (cf. Hébert and Link, 2006: 589), respective conceptualizing may rather be established via the metaphor of a persona entrepreneur (cf. Boutillier and Uzunidis, 2014: 38). Such persona reflects the (rational) agent with the entrepreneurial function(s) closely which is linked to his privately owned firm in a dependent market economy (Ibidem). It unites the specific traits (human capital), particularly ability, creativity, analytical skills, risk-taking, judgment, self-confidence, education, experience, ambition and management, leadership, innovation, responsibility, will-to achieve, adaption, discipline, or need for achievement. Applying scarce skills properly will lead to profit. Risks associated with (new) entrepreneurial endeavors relate to decision making, contracting labor, resource allocating, overcoming liquidity constraints, developing finance strategies, opportunity spotting, and venture creating etc. (Levine and Rubinstein, 2018; Ricketts, 2008; Tanas, 2007; Unger et al., 2011; Faltin

and Ripsas, 2011; Boutillier and Uzunidis, 2014; Bosman and Fernhaber, 2018; Urban, 2021). Filion (2021) categorizes these into six main components: (1) innovation, (2) opportunity recognition, (3) risk management, (4) action, (5) use of resources and (6) added value.

One of the main entrepreneurial functions is, however, to actively look for profitable opportunities which arise only from successful entrepreneurship (Staniewski and Awruk, 2019). This is based on good judgement to invest when others are reluctant to do so (Casson and Casson, 2012). The entrepreneur takes the risk for investments made under uncertainty (Freiling, 2008) and is by that distinguished from employees. Executing the entrepreneurial function contributes to habitual entrepreneurial behavior and will increase competitiveness (Freiling, 2008). Exhibiting good judgement is also observable in households e.g., when one partner holds safe wage employment while the other one runs business, then risk is rather distributed than accumulated (GEM Report 2013).

The “duo uncertainty/ risk” remains at the base of the theory of the entrepreneur as in context of uncertainty he is alert (able) to spot and realize profitable business opportunities by anticipating customer needs (Boutillier and Uzunidis, 2014). He adapts economic activity to minimize associated risk (Andrejczuk and Jałukowicz, 2015). Both technological and non-technological innovation is crucial to entrepreneurs to grow the business (Ibidem) as it reflects the ability to act on changing market conditions (Ubrežiová et al., 2008). In addition, the need for achievement is a decisive factor, applicable particularly to entrepreneurs and economic migrants alike (cf. Vārpiņa et al., 2023: 5). It is the state of economy, of society, of science and of technology that, altogether, enable the entrepreneur to manage the business sustainably, though he does so individually based on and within his specific societal and historical reality (Boutillier and Uzunidis, 2014).

3.1.2.4 Entrepreneurial propensity

When analyzing human behavior in context of cross border entrepreneurial activity, it is necessary to consider the Theory of Planned Behavior (Fishbein & Ajzen, 1975/1980 and Ajzen, 1991). Accordingly, (rational) human behavior guided by systematical processing of available information (Mejía et al., 2021). It is prescribed by an individual’s intentions and these are formed based on attitude towards behavior, subjective norm and perceived control (Ibidem). In migration

context, one research aspect has for long been the analysis of the intention to migrate as a factor for predicting migration (Assfaw and Minaye, 2022). Attitude towards migration and high self-efficacy are important factors that form migration intention. The earlier such intention is developed, the likelier its realization, i.e., the individual migrates (Ibidem).

Furthermore, expressing a tendency to behave towards a certain behavior means an individual is inclined or prone to behave in that way or exhibits a (strong) propensity to such behavior (Cambridge Dictionary, 2023; Etymology Dictionary, 2023). Specifically, entrepreneurial propensity is the tendency of an individual's belief into being self-employed, including setting up a business and/ or accelerating its growth by developing new ways of operating it (Chen, 2014; Chelariu et al., 2008). It triggers a self-strengthening process (Bite et al., 2020) and serves to predict resulting individual activities, thus developing e. g. entrepreneurial culture (Chen, 2014; Chelariu et al., 2008)⁶. Main influencing factors are attitude towards work, risk, independence, personality, or experience (Ibidem). Additionally, entrepreneurial outcome is highly influenced by biological factors affecting an entrepreneurs' psychological traits and attitude which then influences the propensity to engage into entrepreneurship (Nofal et al., 2021). Personality is then specific to each individual and reflects a related mixture of genetic and environmental characteristics, including crucial life experiences (i.e., migration) which is why it varies randomly, i.e. is unrelated to these characteristics, within a given population rather than between societies (Casson and Casson, 2012: 1235).

Self-employment is regarded an occupational choice associated with risk, and individuals choose self-employment based on their risk propensity which reflects traits in their personalities linked to the tendency to either take or avoid a risk. The (subsequent) effect of risk propensity on self-employment entry is driven by high levels of risk propensity (Nieß and Biemann, 2014). The motivation, however, to actually take risk comes more from the success motivation rather than money alone (Kozubíková et al., 2015). Also, these individuals make more use of knowledge acquired in the past. They are therefore ('more') able to set a realistic picture of their doing (Ibidem).

In migration context, researchers link the interplay of push and pull factors to entrepreneurial propensity or refer to theory such as the ethnic enclave theory to explain entrepreneurial propensity

⁶ To investigate about the different entrepreneurial propensity models, reference is made to Chen, 2014, for instance.

among migrants (Zubair and Brzozowski, 2018). An attitude towards risk-taking is inherent to migration, i.e., to the journey itself but also to economic outcome due to uncertainty (IOM, 2020). Whether or not risk propensity influences business survival remains unclear, however, a moderate level of risk propensity seems to predict successful self-employment (Nieß and Biemann, 2014).

3.1.2.5 Business Opportunities

Opportunity is understood as an occasion, a chance or a situation that provides for an individual to do something (Cambridge Dictionary, 2023). With regards to Schumpeter, Kirzner and Schultz, the entrepreneur identifies and discovers chances (Iversen et al., 2007). For Schumpeter these are more of disruptive innovations while for Kirzner and Schultz these are more of occasions when information is revealed and individuals may want to react upon them to move the economy towards equilibrium (Ibidem). Hayek (1899 – 1992, Austrian School of Thought) defines that a process of discovery is ongoing for any entrepreneur, despite being limited in information or knowledge at times (Arc et al., 2009; Dallago, 2017). Discoveries relate to prior experience (Sorgner and Fritsch, 2013). For Eckhardt and Shane (2003) finding these chances generate ground for future chances.

Business opportunities are, in fact, real events and independent of the entrepreneur who needs to actively perceive them (Acs et al., 2009). His alert presence at times of creation is, however, crucial for establishing modes of realization and market implementation (Skibiński and Sipa, 2015; Unger et al., 2011) which heavily depend on market accessibility (Kloosterman and Rath, 2010). Through knowledge spill over, the stock of historical and new knowledge contribute to the ongoing process of identifying growth opportunities (Shane and Eckhardt, 2003; Acs et al., 2009; Wach, 2015b; Acs et al., 2016). Especially economic knowledge - because economically exploitable and thus entering the production process - stimulates entrepreneurship because entrepreneurs use it to further develop their firms but also other firms when transferred, reproduced or developed by them (Audretsch and Keilbach, 2004; Wach, 2015b). These circumstances influence entrepreneurial action and its management, especially for high ability and intrinsic motivated entrepreneurs (Croitoru, 2019), as is the particular case of immigrant entrepreneurs (Dheer, 2018). Moreover, cross border flows of people between economies and their cooperation enrich opportunity spotting and knowledge spillover: international businesspeople but also migrant workers with their entrepreneurialism, skill, and exposure to business along with a desire to return home, they become “very

important as a source of self-discovery in their country of origin” (cf. Stam and van Stel, 2009: 14). They develop the private sector and establish a new elite needed for building up civil society and for accelerating economic growth. As a critical mass of these entrepreneurs is needed, their entrepreneurship potential is to be attracted in policies (Ibidem).

How an individual then represents his business idea, including underlying logic and strategic choices, is expressed via the establishment of a respective business model that should aim to add value and to be different to competition. It is an intermediary between business strategy and the actual business process outcome (Shafer et al., 2005; Veit et al., 2014). However, in migration context, Elo and Servais (2018) state that due to exceptional embedment of two worlds, migrant entrepreneurs do not necessarily follow standard business models.

3.1.2.6 Entrepreneurship

The resulting human action with regards to spotting new opportunities, the creation of new things and emergence of new economic activity in a time-consuming, work-intensive, and risky process is deemed to be regarded entrepreneurial activity (Ahmad and Hoffmann, 2007; Ahmad and Seymour, 2008; similar Davidsson and Wiklund, 2001; Pichur and Wach, 2007; Bursiak, 2016). At most elemental level, entrepreneurship is perception, courage and action (Hébert and Link, 1988). Entrepreneurial people, respectively, as independent individuals or groups of individuals connect various markets, function at malfunctioning markets, obtain needed resources and develop them (Bernat et al., 2016). Entrepreneurial action is therefore discerned in human behavior everywhere in the world at many different times, in different ways and different contexts making sensitivity to context important when examining entrepreneurship (Casson and Casson, 2012), including an individual’s selection into entrepreneurship (Acs et al., 2016).

Respectively, entrepreneurship is the phenomenon associated with entrepreneurial activity (cf. Ahmad and Hoffmann, 2007: 4). It encompasses personal acting through an individual’s ability upon opportunities and ideas to actively transform these into (daily) value for others which can be financial, cultural, or social (Wach, 2015; Bacigalupo, 2021). It may therefore be understood as a continuous and active process of identification and exploitation of entrepreneurial opportunities

with a focus on innovation, novelty and value creation (Ibidem). It is a process that relates to creativity, innovation, risk-taking and (strategic) planning for driving economic growth and job creation, by setting the environment for creating new companies and for exploring new markets (EU Commission Website, 2022; Bernat et al., 2016; Croitoru, 2019; Gedeon, 2010; Wach, 2015). It is, additionally, a necessary activity for starting up, running, and survival of businesses under market uncertainty (Bernat et al., 2016). It is most important to innovation, change and competitiveness (Dallago, 2017; Scheu und Kuckertz, 2022) and therefore, crucial for the vitality of capitalist societies and market economies (Cassis and Minoglou, 2005; Naude, 2008; Stam and van Stel, 2011). Entrepreneurship requires ability to adequately deal with uncertain situations in which the entrepreneur reallocates resources efficiently to become and remain successful (Schultz, 1975). Lastly, entrepreneurship is distinguished by the need for capital which requires the accumulation of wealth (Gunewardena and Seck, 2020).

Entrepreneurship, respectively, encompasses several functions (Wach, 2015b):

- *Function of an individual entrepreneur* – [the who] concerns the microeconomic perspective, though it is not so much a specific individual entrepreneur but more the entrepreneurial function that is under analysis (risk taking, innovative, managing, arbitrage, or capitalist function);
- *Function of personality* – [the why] concerns research at individual level with a focus on characteristics of human action that are not strictly rational but without complete information:
 - Behavioral research: biological, evolutionary psychology, phenomenological, behavioral, or socio-cognitive approaches,
 - Management Schools of Thought: of great person, psychological traits, or leadership;
- *Function of managerial process/ activities*– [the how] considers entrepreneurship
 - as a process of creating new ventures;
 - as a process of discovering and seizing opportunities;
- *Function of market* – [the what] relates to the effects of entrepreneurship through the lens of macroanalysis, including elements of meso- and microeconomic theory; the level of entrepreneurship in an economy depends on three conditions allowing to determine specifically the impact of the SME sector with regards to GDP growth and employment growth:
 - free market economy ensure equal access to business opportunities recipients,
 - guaranteed private property,

- stability of institutions that strengthen the two conditions mentioned above.

Grilo and Thurik (2008) introduce the concept of engagement levels of entrepreneurial stages (“entrepreneurial ladder”): from “Thinking about it”, “Taking steps for starting up”, “Having a young business” to “Having an older business” (cf. Grilo and Thurik, 2008: 17; see also Thurik et al., 2010). The more a company develops, the more it may grow but may face new challenges, barriers, or risks from reached stages which need to be further managed (Stawasz and Ropega, 2014).

To summarize, the **entrepreneurial framework** comprises of the three elements: **entrepreneur**, **entrepreneurial activity and entrepreneurship** (Ahmad and Hoffmann, 2007). The underlying process of entrepreneurship consists of opportunity perception (conception), opportunity evaluation (gestation), firm creation (infancy), firm adolescence (maturity), and, at some point in time, closure (exit) (Naudé, 2008; Dheer, 2018). Entrepreneurship, moreover, happens in a regulatory framework, including e.g., administrative rules to market entry and growth, as well as labor market and fiscal regulations that affect performance (Ibidem).

3.1.2.7 Defining Small and Medium Sized Businesses

An economic system consists of different levels when it comes to understanding entrepreneurship, entrepreneurial activity, and outcome (Postaliuk and Akhmetshina, 2014). These are:

- Mega Level – concerns the global economy
- Macro Level – concerns the national economy (level of production)
- Meso Level – concerns the regional economy (level of entrepreneurship in industries)
- Micro Level – concerns the economy of a company (entrepreneurship in firms such as SME, Andrejczuk and Jałukowicz, 2015)
- Nano Level – concerns the economy of an entrepreneurial person (personal level): the “self-employed”, “solo self-employed”, “sole trader”, “own account worker”, “non-employer”, “solopreneur” (cf. Belt et al., 2015: 383) who have in the provision of goods and services much in common with [micro] SME (McKeown and Phillips, 2014), including (return) migrants and their businesses (Brzozowski et al., 2014; Wahba, 2022).

One of the most common and accessible organizational forms of (international) economic activity for individuals are, in fact, SME. SME are divided into micro, small and medium sized businesses depending on number of employees, balance sum, or annual income (Yakivna et al., 2019).⁷ They can be any organization engaged in economic activity, regardless of its organizational and legal form which encompasses the individual self-employed or family firms but also partnerships and associations, or “any subjects that regularly engage in economic activity” (cf. Yakivna et al., 2019: 71). It considers explicitly business interests of an individual (Ibidem). However, SME owners manage their business based on a more intuitive and common-sense management attitude approach pursuing temporary profits at low cost rather than acquiring and applying extensive knowledge of management, marketing, economic analysis, or development of long-term strategies like entrepreneurs, thus high failure rates occur (Haber, 2017). Profitable business opportunities are spotted by arbitrage as they are not limited to opportunities in their market (Freiling, 2008).

As part of the economy, SMEs form a competitive environment to large-scale businesses (firms, enterprises), as they activate innovation processes, saturate (new) markets quickly with (new) products and services depending on changing demand and supply but also influence price levels and affect employment through job creation at lower cost of capital (Yakivna et al., 2019; Urban, 2021). They each and to their extent provide for innovations that fuel the economy (Urban, 2021) as they cost efficiently produce intermediate goods and services for large(r) companies which “facilitates [their own] integration of the domestic economy to Global Value Chain” (cf. Ahmadov, 2020: 203). Innovation is, however, more related to process re-thinking than pure technical innovation (Freiling, 2008). Since SMEs are more flexible, mobile and adapt quicker to new economic and geographical environments, they grow in numbers more easily – they have low structural complexity due to flat hierarchies and lean administrative processes (Ibidem). Because of their size, SME do not suffer significant losses; they appear in sectors such as forestry, fish farming, wholesale, retail, repair services and are more profitable than large-scale enterprises (Ahmadov, 2020; Yakivna et al., 2019). Respectively, they should be addressed distinctively (Gherhes et al., 2016) and not used as synonyms for the wide concept of entrepreneurship (Wach, 2015b).

⁷ According to smeunited.eu (25.4.2023), there are about 22 mill SMEs in Europe which employ around 82 mill people; SMEs in Europe count for 99,8 percent of all enterprises, 2/3 of employment and close to 53 percent of the added value created in the EU. Micro-businesses, for instance, may engage up to 9 employees, the small ones between 10 to 49 and the medium sized up to 249 (EU Eurostat, 2023; Gherhes et al., 2016).

At the same time, SME are more sensitive to negative effects of the external environment, limited in absorbing new knowledge and in employing new labor from outside (Yakivna et al., 2019). Risk and uncertainty may become a growth constraint: as SMEs are more personalized, it is no one else than the owner (entrepreneur) who must manage business, bear financial and investment risk in an environment with small(er) customer bases, long-term investments (including credit), and limited bargaining power which, for protection reasons, needs effective control and management systems (Freiling, 2008). Especially with regards to the micro businesses, development and success depend on but at the same time reflect the (sustained) business capability of the owner (Gherhes et al., 2016). Success, additionally, depends to a great extent on what policies and assistance offer (Ubrižiová et al., 2008). Due to their importance to economies and to attract a choice into setting up business, fostering SME entrepreneurship has been high on the EU policy agenda in recent years with one - among other - outcomes that SMEs may apply for EU financial resources (Yakivna et al., 2019). Such financial support the economic foundation for any successful SME development since (individual) credit restrains are still one of the biggest obstacles in setting up and running micro businesses (Yakivna et al., 2019). Furthermore, a major obstacle to micro business development is the “small-scale trap” when the business focus is more on local-scale operations under high-risk aversion and management skill gaps (Czerniak and Stefański, 2022).

Specifically, despite high risk, low investment, close to zero market entry cost etc., start-ups offer chances to survival as they focus on easily scalable product or service idea development, lack formalism, adapt strategies easily despite operating in economies of precariousness and insecurity, and may therefore reach global success also out of semi-peripheral economies (Andrejczuk and Jałukowicz, 2015). Though they are designed and dedicated to grow fast, it is difficult to go beyond local markets and to attract partners or investors as non-economic factors such as abilities, building alliances or creating impact of their competitive advantage are limited in their extent. Respectively, social capital is a crucial component in relation to survival. There are higher failure rates to start-ups than to those who set up a traditional SME, as for instance they are high-risk ventures with high (global) competition (Ibidem). Additionally, the cultivation of start-ups may address concerns over immigration, i.e., in terms of providing activities for immigrants (Brooks et al., 2019).

3.1.2.8 Economic sustainability in return migration context

The term sustainability refers to the ability of something to continue for a long(er) time at the same level (Macmillan Dictionary, 2023).⁸ Economic sustainability is one pillar of dealing with sustainability besides social, environmental, and institutional dimensions (Spangenberg, 2005; Boar et al., 2020). It is therefore closely related to individual and collective survival, today and tomorrow. Economic sustainability is equated with economic growth which is valuable or viable as long as the total amount of capital increases, though at the expense of natural resources, ecosystem services or welfare (KTH, 2023; Markulev and Long, 2013). This concept includes cost-efficiency, increase of profit and business opportunities, operational stability, risk reduction methods etc. (Boar et al., 2020). It performs best when markets are complete and well-functioning as only then resources are allocated efficiently to their highest value (Markulev and Long, 2013). Moreover, economic sustainability is desirable as it prevents from firm death. During lifetime it is necessary, however, to ensure that the business survives through effective management and a leveraging of external and internal influencing factors. The effectiveness of such factor interplay indicates economic development on both the macro and the organizational level (Doane and MacGillivray, 2001). Among other criteria such as innovativeness or competitiveness (Spangenberg, 2005), profitability expresses success but also years in business/ service, though there is no minimum or maximum time threshold for duration (Doane and MacGillivray, 2001).

Applied to return migration context, the question of a sustainable return arises with regards to whether the returnee is able to find a suitable place at the home country labor market to meet the pay gap between the host country and the home country labor market (Glorius, 2023). Sustainability with regards to a migrant business is understood “as a situation in which this business becomes a stable source of income and the socio-economic security of the entrepreneur” (cf. Zubair and Brzozowski, 2018: 58; similar Mohammadi et al., 2018). To drive growth, the aggregate conditions of a home country economy together with the subjective perspective of and the objective conditions for the returnee then influence the magnitude of business sustainability (Van Houte and Davids, 2008). Specifically, once the returnee finds his place in the home country economy

⁸ With regards to sharing economic business models, reference is made to Boar et al. (2020). Since first introduced by the late 1980ies, sustainability embraces normatively the “development that meets the needs of the present without compromising the ability of future generations to meet their own needs” (Boar et al., 2020: 1).

through belonging and participation, sustainable livelihood of business can be established, maintained, and expanded that will respond to stress or shocks along with quick recovery from these (Ibidem). Consequently, such “modern entrepreneurship should slow down [e]migration flows” and secure economic development of the home economy (cf. Kriščiūnas and Greblikaitė, 2007: 24). On more aggregate level, migration is sustainable when, for instance, disparities between places or sectors of a given society are reduced (Franco Gavonel et al., 2021).

3.1.3 Delineation of enterprise vs. smaller scale business ownership

Theory on occupational choice has dominated the investigations around who decides for what reason and which consequence into self-employment (Thurik et al., 2010). Traditionally, there was only one occupational choice which was to be a worker and later to also be an entrepreneur (Jacobs, 2007). Initially, entrepreneurship meant “working for oneself” with trading off risk and returns while safe returns came from paid employment (Roy, 1951; Lewis, 1954; Ranis and Fei, 1961; Naudé, 2008; Rocha, 2012). People used to predict returns on each of the two sectors and choose for the maximum rewarding one, depending on individual risk attitude, productive capabilities and abilities (Knight, 1921; Rocha, 2012; Parker, 2018). Over time, characteristics such as arbitrage, speculation, or innovation have suggested more delicate difference exist between occupational forms such as wage-employment, smaller scale business or investment in larger, impacting enterprises (Parker, 2018; Naudé, 2008; Golob et al., 2020). Scholars have also investigated why some countries become economies with entrepreneurs employing workers in large factories while other countries remain represented by small proprietors and peasants (Jacobs, 2007).

Naturally, only few entrepreneurs realize large-scale opportunities of innovation that create “Schumpeterian new” and that earn more than a typical wage-employee. There are more of these business owners who are their own boss (“solo”), struggling along the line in similar earnings to wage-employees, low productivity, and little desire to grow (Levine and Rubinstein, 2018; Dal-lago, 2003; Ciešlik, Dvouletý, 2019). While the first group is a “powerful engine of growth”, the other group is “an important source of new jobs” (cf. Kim, 2008: 1). These two groups of self-employed have different traits and earnings structure and should therefore be grouped differently (van Stel et al., 2014), namely: 1) entrepreneurs (“incorporated”) and 2) other self-employed

(“unincorporated”), as Levine and Rubinstein (2018) suggest. “Incorporated” is linked to circumstances such as separate legal entity, large(r) investments, external financing, non-routine activities, complex problem-solving, managing others, visionary thinking, and willingness for high(er) achievements etc. while “unincorporated” is linked to manual skills, more routine activities, barriers from capital liquidity and assets (Jacobs, 2007; Levine and Rubinstein, 2018).

Compared to employees, the unincorporated “other” self-employed are ‘more’ autonomous, show ‘more’ initiative, need to adapt ‘more’, are imitative and reactive (Rona-Tas and Sagi, 2006). The effectiveness of their work depends on the amount and quality of acquired knowledge and balanced skills, level of motivation and willingness to act (Dvouletý and Orel, 2020). They may not necessarily look for pure profit maximization but rather maximization of household consumption enhancing social status. They are geographically locked, serve the local market and rely on support by networks such as family (especially in family business) and friends (and not banks) with earnings increase through working more and upgrading skills within their field of expertise, resulting in business development limitation (Rona-Tas and Sagi, 2006). Family tradition of being (small) business owners (experience, success), family education (upskilling, learning), family structure (work-life-balance, childcare), ethnicity (immigration), weak workforce demand, unemployment, or other disadvantages to labor markets (discrimination, language barriers, niche businesses, etc.) are boundary factors for a choice into smaller scale self-employment than entrepreneurship (Kim, 2008). These (“other”) self-employed may then be encouraged to continue business more on their own, focusing on personal professional skills with the role and magnitude of their networks determine success over failure (Belt et al., 2015). They often need to make a living from the business (necessity) and concentrate on the ‘self’ while the entrepreneurs concentrate on the business (opportunity) and are “the shakers and movers” (cf. Bates, 1993: 248).

Therefore, “bundling together these two different types of self-employments - conceptually and empirically - might yield misleading perspectives and inferences about entrepreneurs” (cf. Levine and Rubinstein, 2018: 4). The terms should not be used interchangeably, as often done in literature or by public institutions (Faltin and Ripsas, 2011; Rona-Tas and Sagi, 2006). Term delineation prevents from confusion in understanding and statistical capturing (Ahmad and Seymour, 2008).

Consequently, in context of this dissertation, the above explanation of the (metaphorical) entrepreneur should be further specified: The persona of an entrepreneur is an independent individual occupied with unincorporated, “other” self-employment who works merely on his own and for profit (Bjuggren et al., 2010; Iversen et al., 2007), though under high uncertainty (“subset of Knightian entrepreneur”, cf. Iversen et al., 2005: 13).

3.1.4 Key factors influencing a choice into self-employment

Jacobs (2007) emphasizes a combination of three major explanatory variables: human capital, risk aversion and initial wealth. However, related and additional factors play decisive roles.

For human capital, education is decisive: individuals with formal primary education and highest educated (tertiary education) show the highest propensity to be self-employed. The least educated that are marginalized at the waged labor sector choose so for some bettering of their situation while the higher educated become self-employed for more positive reasons such as desire for independence (Cowling et al., 2019; Kerr and Kerr, 2020). High-skilled people then prefer to enter high-barrier industries while less educated people are more likely to enter low-barrier industries (Poschke, 2008). The better educated the individual is, the easier a move along the entrepreneurial ladder (Thurik et al., 2010). Also, the more an individual is prone to self-employment, the more likely a move to a higher level of entrepreneurship engagement rather than a remaining on current stage (Ibidem). Relatedly, the development of competence in a variety of skills is important as competent individuals show a higher probability of being self-employed. Particularly, innate factors such as preferences, attitudes, and personalities drive the development of acquiring human capital related to entrepreneurship which leads to the accumulation of a balanced skills portfolio. Building on competence, individuals with more diverse employment histories are more likely to become entrepreneurs to which prior experiences have great influence (Sorgner and Fritsch, 2013).

Referring to economists such as Stiglitz and Weiss (1981), de Meza and Webb (1987), Parker (1996) or Evans and Jovanovic (1989), Banerjee and Newman (1993) explain that the propensity into business depends on 1) the degree of risk aversion and the differences in risk assessment: more risk-averse individuals become wage-employees while more risk-tolerant agents opt into entrepreneurship (Rocha, 2012; McFarlane, 2016); and 2) on initial wealth and/ or collateral: richer

people receive greater loans to start bigger businesses while less rich people receive smaller loans that allow for just low scale production or even none which then pushes them into poor wage employment (Jacobs, 2007; Wach, 2015b). More generally, people who (can) borrow capital will start a business if their income, after considering the cost of borrowing capital with interest, will exceed the wages offered to hired workers (Wach, 2015b). Furthermore, once young firms overcome initial financial constraints, they can grow in firm size (Naudé, 2008) which is why credit made available to SME is an important factor as to whether business is established (Rona-Tas and Sagi, 2006; Coleman et al., 2010; Gherhes et al., 2016). The better the economic development of an economy, the better the lending situation which creates more opportunities for more individuals to benefit from being eligible for credit making anyone to become an entrepreneur (Wach, 2015b).

Findings show that income maximization is (still) a major decisive factor for entering business (Jacobs, 2007). Starting a new firm, entering into an existing firm and remaining in business is a continuing trade-off between cost (i.e., forgone wages) and future profits (benefits): for the high-ability people uncertain future profits are high (incentive) so they start firms by opportunity while for the low-ability people forgone wages are not high but the opportunity are cost low so they start firms to meet the necessity for survival (Poschke, 2008, 15; Rocha, 2012; Naudé, 2008; Croitoru, 2019). For the intermediate skilled, the tradeoff is not as favorable: costs exceed benefits, so they work as employees (Poschke, 2008). For people, however, entering business is a deliberate choice even though expected returns may be below wage income because they misperceive risk or are overly optimistic (Naudé, 2008), preventing them from rational and critical market evaluation (Scheu and Kuckertz, 2022). If started a business as a desperate response to unemployment causes high risks of failure due to none or too little entrepreneurial ability (Beaver, 2003, Jacobs, 2007).

Lucas (1978) and Murphy (1991) thus emphasizes ability as a key influencing factor: it is the capacity to invest in capital productivity as opposed to working ability to produce income out of labor (Naudé, 2008: 7). Individuals will once or repeated (even after failure) start a new firm if a higher value is possible which depends on an individual's productive ability: the more able ones tend to run more productive firms ("ability to try again" cf. Poschke, 2008: 11; similar Naudé, 2008; Parker, 2018; Jacobs, 2007; Bates, 1993). To stress the importance of ability, Murphy (1991) incorporated entrepreneurial ability explicitly into the production function: individuals with higher

ability and talent face relatively better incentives to manage larger firms while those with less magnitude may, at the end, even exit for (safe) wage employment (Naudé, 2008). Moreover, there is consent among scholars that entrepreneurial ability is linked to personality, yet it remains unsettled whether this is inherited or acquired (Casson and Casson, 2012). However, societies may appear more entrepreneurial at times than others, and this is best explained through culture (Casson and Casson, 2012: 1236). Astebo and Thompson (2011) suggest that varied employment experience may foster entrepreneurship (Parker, 2018; similar van Praag, 2003).

Furthermore, some people engage in business if they are not only equipped with sufficient entrepreneurial human capital but also with extended social capital such as family, relationships, and business networks which they can rely on as needed (Boruc, 2018; Zapalska et al., 2005). Family business history drives into taking up business by the next generation because knowledge spill over is most sufficient in this form of business (Rona-Tas, 2006). Others may value non-financial over financial benefits in an entrepreneurial culture which per se encourages entrepreneurial diversity and heterogeneity (Naudé, 2008). For again others business is chosen in desire for securing social security coverage or risk diversification while holding a wage job (Szarucki et al., 2016). Others may wish to overcome regulations or to avoid taxes (Naudé, 2008). Furthermore, increasing outsourcing of large firms may pathway into entrepreneurial activities (Cowling et al., 2019; Bąk-Grabowska, 2014). Lastly, active labor market and policy and program design to increase flows into self-employment are pull factors entering into entrepreneurial activities (Cowling et al., 2019).

3.1.5 Successful entrepreneurship

A. Key influencing factors on firm performance and long-term success

Concerning defining and measuring derived business performance and success, mostly qualitative studies have been undertaken, and there is a lack of quantitative studies in abundance of universally agreed definitions on related terms and concepts (Staniewski and Awruk, 2019). Ahmad and Hoffmann (2007) emphasize six specific themes that affect entrepreneurial performance: access to capital, access to technology, capabilities, market conditions, regulatory framework, and culture.

Macroeconomic factors such as physical and human capital, labor, technology, institutional environment, the progress of market or structural reforms (supply side) but also the market itself (demand side) set the general framework in which (transitional) SMEs operate in a given economy (Próchniak, 2011). A favorable economic environment is developed through increasing economic freedom and liberalization, investment rates (FDI), international trade and exports, productivity gains, capital endowment and a reliable monetary policy. Efficient developments of the institutional environment (especially banking sector) support economic growth through access to resources, finances, grants, and business infrastructure (Gherhes et al., 2016). Respectively, a resulting high private sector share in GDP expresses actual economic growth, including from SME (Próchniak, 2011). However, growth oriented SME performance continuously requires such favorable environment which the business owner in fact needs to perceive as positive and therefore, makes effective use of it. External factors (competition, shocks etc.) that are out of the owner's control are constraints to growth ambition and to unfolding ability. It requires change strategy application and resilience by the business owner to overcome (Gherhes et al., 2016).

For individual business owners, performance and success are, however, more microlevel related as the individual is more personally and emotionally involved and responsible (Bernoste et al., 2019). Precise measurable factors such as earnings, years of service and duration, growth in number of employees, profitability, turnover, or return on investment express performance (Walker and Brown, 2004; van Praag, 2003; Bernoste et al., 2019). Firm "smallness" (rather than "largeness") is, however, critical since small businesses are more vulnerable and fragile to economic distress because their revenues depend on narrower range of products and services within a more geographically locked area, limited in brand effects, in penetrating markets or diversification (Coleman et al., 2010; Freiling, 2008). Besides, subjective aspects matter: flexibility in working hours, personal control, personal satisfaction, family closeness, willingness to work hard or true commitment (Alstete, 2008). Success may be perceived as the fulfilment of (only) these subjective and not solely through the objective criteria (Staniewski and Awruk, 2019; Berthold and Neumann, 2008; Belt et al., 2015). In return, some of these subjective factors bring, however, dissatisfaction: long working hours cut family time, being held responsible along with risk-taking may cause (mental) stress and pressure, etc. and require resilience building (Alstete, 2008). Risk avoidance is not contributing to performance (Kozubíková et al., 2015).

For Lazear (2005) the type of education is then important: practical skills suffice more effectively than high academic skills or narrow specializations (Naudé, 2008). When exposed to a range of activities and contexts, “entrepreneurship can be learnt, and [...] learning by doing [...] matter for self-employment” (cf. Mahé, 2018: 4, 6,13; similar Gherhes et al., 2016; Urban, 2021; Bajdor et al., 2021). Respectively, knowledge and information gathering reduce the level of uncertainty associated with innovation in dynamic environments and are therefore decisive performance and success factors in both high-technology industries and low-technology industries (Unger et al., 2011). Developing human capital should be task-related and directly related to knowledge and skill building to become effective. Furthermore, the more an entrepreneur has invested in his human capital, the more he strives for business growth to receive and sustain returns on investment. Respectively, increasing the level of human capital positively affects business performance year after year, a positive effect that scholars have repeatedly investigated (Unger et al., 2011). However, increasing education may cause volunteer business exit in case the individual earns better when in safe wage employment (Naudé, 2008). Small firms may, however, persist in the market when their owners have low or no outside options in the labor market (Poschke, 2008).

An owner’s age and experience matter: these factors expresses (informal) human capital accumulation, especially of the above mentioned work-related experience and experimental learning (Cowling et al., 2019). Van Praag (2003) finds for a US sample that the older the individual starts a business, the longer it lasts. He further demonstrates that the more and longer relevant experience in industry or occupation of the entrepreneur is developed, the more successful one is, though not necessarily always in self-employment (Van Praag, 2003). However, with increased age, a decay in physical and mental abilities may appear along with increasing risk-aversion and unwillingness to try new things (Cowling et al., 2019; Thurik et al., 2010). The older one starts a business, the lower the opportunity to recover entry cost are but self-employment offers flexibility elderly people need for daily recovery (Cowling et al., 2019). Low (state) pension income, clinging to the business or having no one to transfer the business to may be reasons to extend the duration of the business with increasing age, even beyond retirement age (Cowling et al., 2019). For some, success may be related to duration in business and not the venture itself (van Praag, 2003). In international context, Wach and Głodowska (2021) explain that with increased age, accumulated financial means, knowledge and experience may increase the possibility to take the chances into business

growth through internationalization; however, for those individuals that started out of necessity, age is not as much a factor for success.

Social capital grants access to critical resources enhancing performance, success and survival chances (Coleman et al., 2010). Additionally, interpersonal ties and the ability to create new connections matter: networking is crucial for knowledge exchange as it is a source for new ideas and innovations (Urban, 2021). Geographical capital then matters especially as in geographically dense areas spillover effects of entrepreneurial activities enjoy larger effects (Coleman et al., 2010). Micro business owners, however, generally do not engage in intensive networking which may limit business opportunities for recruiting, organizational and personal learning, or turnover increase which, all together, limits growth perspectives (Gherhes et al., 2016).

Experiencing positive feelings and emotions help realize available opportunities, build, and expand social networks, balance stress levels, increase motivation and effective responding to market changes, and therefore grow and sustain the business (Bernoste et al., 2019). Furthermore, belief in one's business idea and not adhering (too much) to what the competitors do, positively influences business. Also, success is possible when desired markets are already saturated but entering these through differentiating strategies enables the business to perform better through quicker adherence to customer needs (Urban, 2021).

Additionally, management and leadership strategies are required for owners to shift from a strong operational and product focus to a level of more strategic business management, including strategic thinking and planning but also IT infrastructure, marketing, and human resources to perform better and on long-term basis (Barnes, 2019; Gherhes et al., 2016). In advancing these skills owners can make more informed decisions and thus grow their business at given times (Barnes, 2019). Seeking external tailor-made advice is also positively related to business success (Bernoste et al., 2019).

A decrease in motivation to strive for competitiveness and growth retards investment in modernization of business, strategies, and infrastructure which keep especially small businesses in small scale or niches which limits performance and success (Dallago, 2003). If, additionally, growth intentions are limited to only a certain level of satisfactory income or risk-tolerance, there is

decreasing motivation to drive the business, though a will to achieve is in micro businesses a vital business continuity driver (Gherhes et al., 2016). As there is a positive correlation between personal achievement, motivation and entrepreneurial success (Staniewski and Awruk, 2019), policy makers should stimulate individuals to pursuing ongoing business ambition (Gherhes et al., 2016).

Though “success in self-employment has no unique definition or measure” (cf. van Praag, 2003: 2), performance and success encompass all the above key factors in mutual effects (Alstete, 2008; Staniewski and Awruk, 2019; Coleman et al., 2010; Ahmad and Hoffmann, 2007). As subjective factors leverage the more objective factors, they may limit business growth aspiration (Gherhes et al., 2016). As “success is a multidimensional construct” (cf. Unger et al., 2011: 15), the magnitude of performance and success does not so much depend on the fit between individuals and their ideas but on the fit between the process and the crucial elements of entrepreneurship (McFarlane, 2016). And therefore, “it is [once more] the man who makes the difference as he sets the conditions, the boundaries, the characteristics and, ultimately the value-creating ability of the newly founded firm” (cf. Van Praag, 2003: 1).

B. Key influencing factors on firm survival

Naturally, not everyone can be a successful businessman as entrepreneurship would no longer be a scarce resource and with no reason to reward it (Casson and Casson, 2012). Survival is linked to business set-up but also to failure rates (Cook et al., 2012). About half of new SMEs fail within the first 3- 5 years of operations, even less survive 10 years (EU Statista, 2022⁹; Van Praag, 2003). The biggest challenges remain covering financial and loaning costs (Nehrebecka and Dzik, 2013).

If “new” is defined in a boarder sense than only in the narrower understanding of Schumpeterian way, start-up rates reveal the initial point in measuring business ownership, provides the number of new entrepreneurs and the number of new businesses as a measure of new entrepreneurial businesses (Ahmad and Hoffmann, 2007). Young business owners initially suffer from the “liability of newness” compared to more established businesses that can, however, be balanced by high

⁹ Accordingly, the country with the highest business survival rate was Greece, which had a one-year survival rate of 96.7 percent while Lithuania had the lowest. For Poland the rate was at 74.56 percent, just behind Germany 74.86 percent and both behind CEE countries such as Croatia, Slovenia, Romania, Slovakia, Hungary, or Bulgaria.

human capital right from the beginning (Unger et al., 2011). Young firms may be more growth oriented but mature businesses may run with greater longevity (Gherhes et al., 2016). At a later firm stage, the “liability of adolescence” may be an increasing threat to survival when initial (start-up) resources become depleted and decline with further firm age (Coelman et al., 2010). The success or failure of business is then measured best through survival rates (Desiderio and Salt, 2010).

For some scholars, the quality of developed human capital in entrepreneurial context remains one of most decisive determinant for firm survival, even over financial capital or statistical measures (Coleman et al., 2010). Notably, industry-specific work experience and prior-start-up experience are complementary factors. Entrepreneurs know the fields in which they act, and they understand the entrepreneurial process and its various stages. From an owner’s perspective, a continued development of established levels of human, social and financial capital influence the likelihood of firm survival, and it is therefore the task of no one else than the entrepreneur to apply resources effectively and efficiently to provide a competitive advantage to secure firm survival (Ibidem).

Though not all businesses last long, exiting does not always mean firms were not at all successful as some individuals sell their business, give up, show a lack of willingness, or no longer want to continue the business while others enter retirement age (Coleman et al., 2010; Naudé, 2008; Beaver, 2003; van Praag, 2003). Again others want to remain in independence or flee the stigma of failure and therefore remain in business, despite struggling (Naudé, 2008). Respectively, “only compulsory exits are associated with lack of success” (cf. van Praag, 2003: 2) as there is a mismatch between resources, capabilities, and opportunities in the market (Coleman et al., 2010). Increased competition, falling profit levels, increased actual or opportunity cost, insufficient entrepreneurial or managerial ability, increased wages, unfavorable economic conditions, and policies may lead to (forced) endings of business (Naudé, 2008; Beaver, 2003). Terms like firm death, discontinuance, bankruptcy, insolvency, dissolution, or closure are often seen as synonyms for failure but “common sense dictates that these terms do not mean the same thing” (cf. Beaver, 2003: 118) but encompass further circumstances for firm endings (van Praag, 2003).

Advancing on the previous chapter, the following characteristics are key variables to consider in the empirical analysis of entrepreneurial propensity, firm performance and firm survival.

Table 2: Key variables for empirical analysis

Age	Migration status (e.g., return)
Gender	Geography (e.g., rural, urban, country)
Education level	Start-up point in time and duration, exit reason
Occupational status	Industry
Accrued knowledge and experience	Investment potential (e.g., earned money)
Household size	GDP development
Family status	SME

Source: own elaboration

3.2 Immigrant entrepreneurship

3.2.1 Definition of key terms and concepts

In addition to the earlier introduction on the term, an immigrant is a person who was born, raised, and educated in one country and migrated to settle permanently to or temporarily in another country, irrespectively of nationality (Aliaga-Isla and Rialp, 2013; Brzozowski et al., 2017). While at earlier scholarly research the individual used to find himself in a rather unrealistic socio-economic vacuum, determined at a fixed time neglecting the impact of dynamic, intervening variables (Storti, 2014), increasing variations between different groups of immigrants or group characteristics caused a shifting to define and explain the phenomena rather on group than individual level (Kloosterman and Rath, 2010). Immigrants have become considered as groups that are highly diverse but also contribute to diversity themselves (“superdiversity”, cf. Glinka, 2018). They are united by a set of socio-cultural connections and regular patterns of interaction among people who share common national background or migration experience (Davidaviciene and Lolat, 2016).

Out of those immigrants who spot new business opportunities and set up business soon after arrival in the host country shall be defined as immigrant entrepreneurs (Brzozowski, 2017; Glinka, 2018; Aliaga-Isla and Rialp, 2013; Barberis and Solano, 2018). Similar to general entrepreneurs, they identify, create, and exploit economic opportunities to start new ventures, though in the host country (Bakker and McMullen, 2023). There, they usually serve their ethnic community. In case they serve between different ethnic groups at the host country, they are considered “middleman minority” (cf. Gurău et al. 2020: 2). However, the diversity of people in businesses that are not of origins

from the country where founded remains a “fuzzy topic” as different terms flow around: migrant, immigrant, ethnic, foreign or expat entrepreneur and the many more (Davidaviciene and Lolat, 2016; Dheer, 2018; Kulchina, 2017). Reasons are missing or overlapping theoretical frameworks or scholarly agreed definition and delineation of term boundaries (Dheer, 2018).

Immigrant entrepreneurship is understood as “a socio-economic phenomenon that focuses on first-generation immigrants and their entrepreneurship” (cf. Elo and Servais, 2018: 371).¹⁰ It relates to the processes in search of profit, independence or social upward mobility (Dheer, 2018; Ramos-Escobar, 2022). The deriving development strategy depends on the individual home to host country combination and on the magnitude of the ethnic community at the host country that runs effectively on the adequacy of what its ethnic groups can and are allowed to offer, plus of the relationship between consumer demand and what these groups can supply (Garrido and Olmos, 2009). Since there is no unified definition, researchers often use the terms ethnic and immigrant entrepreneurship interchangeably (Kloosterman and Rath, 2010). However, the distinction between immigrant entrepreneurship and immigrant (“other”) self-employment also applies, in the same manner as for term delineation on the different kinds of general entrepreneurship (Brzozowski, 2019).

An ethnic enclave is defined as an immigrant group which concentrates in a distinct spatial location and organizes a variety of businesses serving their ethnic market and/or the general population (Malerba and Ferreira, 2020). To such ethnic ownership economy belong self-employed, unpaid family workers or co-ethnic employees (Light, 2021). They involve in economic activities as the owners of businesses that are mainly set up for economic survival and that are profit-oriented, yet primarily in ethnic markets (Brzozowska, 2018). They interconnect with other forms of entrepreneurship, e.g., international or returnee entrepreneurship (Malerba and Ferreira, 2020).

Ethnic entrepreneurship refers to entrepreneurial activity at the host country between people with common origins and migration experiences and that is based on their connections and interactions (Glinka, 2018; Starnawska, 2012). They do not form a majority population (Davidaviciene and

¹⁰ There are related fields that are omitted in this dissertation such as behavioral differences between first- and second-generation immigrant entrepreneurs (Thai and Turkina, 2013); increasing involunteer migration since 2015 towards Europe for investigating about (refugee) immigrants and their occupational choice, i.e., refugee entrepreneurship (Brzozowski et al., 2021); or the effect on the emergence of ethnic entrepreneurs for sectors and cities involved and the role of governmental and non-governmental regulations in it (Reeger, 2018).

Lolat, 2016). More generally, minority entrepreneurship is referred to when entrepreneurial activities are undertaken also by racial minorities (e.g., Africans in the UK), indigenous people (e.g., Native Americans in the US), or religious minorities (e.g., Muslims in the US) (Dheer, 2018). The delineating criterion is the social categorization of the business owners as they face unique challenges within their contexts (Ibidem).

Diaspora entrepreneurship is entrepreneurial activity conducted by migrants who have settled outside their country of origin but who maintain close ties with their home country through direct business from abroad (Osaghae and Cooney, 2019). They access unique resources through established intra-diasporic networks which link co-ethnic communities both internationally (e.g. Poles in the UK might be linked to Poles in the US and Germany) and locally (e.g. Turks in Cologne/Germany might be linked with their co-ethnic peers in Berlin/ Germany). Thus, they continuously benefit from country-specific cultural capital allowing for discoveries more effectively than in cases of foreign entrepreneurs (Brzozowski et al., 2017; Brzozowski, 2017).

Transnational entrepreneurship is entrepreneurial activity carried out recurrently by immigrants in a cross-national context who are actively and simultaneously embedded in at least two different social and economic environments with no definite return plans (Drori et al., 2009; Brzozowski et al., 2017; Brzozowski, 2017; Malerba and Ferreira, 2020; Dheer, 2018). Accordingly, they concurrently maintain business related linkages with their (former) country of origin and currently adopted countries and communities, either as an alternative form of host country adaption or as a secured pathway in case of potential return migration (Drori et al., 2009; Brzozowski, 2017).

Finally, transnational diasporan entrepreneurship is an entrepreneurial activity conducted by transnational immigrant entrepreneurs which is dispersed across multiple locations instead of only two (Brzozowski et al., 2017; Riddle et al., 2010).

3.2.2 Research field

In a given economy, entrepreneurship then encompasses entrepreneurial activities not only by non-immigrants but also by immigrants. The latter choosing into business is regarded as one way how they become productive and thus contribute economically to host country economic development

and overall societal well-being (Brzozowski and Lasek, 2019). This is regardless of whether the host country is a developed or a less(er) developed economy (Scheu and Kuckertz, 2022). In recognition, the research field became “a distinct area of investigation that deserves attention within broadly understood entrepreneurship research” (cf. Glinka, 2018: 27). In fact, an increasing population to about 300 mill international migrants with a share of about 60 percent labor migrants (IOM, 2023) and noticeable economic contributions of immigrant activities to host economic development have, consequently, “spawned a plethora of studies on immigrants and their participation in the labor markets, not only as employees but rather entrepreneurs, creating business” (cf. Aliaga-Isla and Rialp, 2013: 2). As such, immigrant entrepreneurship has established an important, non-neglectable socio-economic phenomenon and reality (Malerba and Feirreira, 2020; Kloosterman and Rath, 2010). Furthermore, immigrant integration and related policy design are increasingly dealt with by scholars (Brzozowski, 2019).

As of the beginning of the 20th century, many (economic) immigrant entrepreneurs were driven by survival necessity with their businesses established at the marginalized secondary market sector. Respectively, small ethnic business has established the most natural choice for immigrant business (Glinka, 2014; Brzozowski and Lasek, 2019; Garrido and Olmos, 2009; Brzozowski, 2017) with related scholarly approaches evolving around the ethnic economy (Brzozowski, 2019). Particularly, as of the 1980ies migrant entrepreneurship has become a field of interest to economists, sociologists, psychologists, anthropologists, as well as to the fields of international business and human resources but little yet to management (Dabić et al., 2020; Barberis and Solano, 2018; Glinka, 2018; Dheer, 2018). Due to heavy and steady migration influx to developed countries such as the USA or Canada over many past decades, the study on the subject pioneered out of these destinations. Due to increasing migration elsewhere, other destination areas like Oceania or Europe have been studied and included into research (Dabić et al., 2020; Aliaga-Isla and Rialp, 2013; Dheer, 2018). Accordingly, research on immigrant entrepreneurship has over years followed the path of advanced economies: international migration has become a critical feature of industrialized countries when immigrants from less-developed countries (South) migrated into developed countries (North) due to favoring immigration policies (Aliaga-Isla and Rialp, 2013; Guerrero et al., 2021; Okólski, 2007; Brzozowska and Glinka, 2019). Respectively, scholars used to study migrant entrepreneurship “down”, that is migration phenomena towards core (Western) states. Due to

recent migration developments in directions such as CEE (including Poland), scholars increasingly research migration “up”, e.g., from core states to lesser developed countries (“inverse migration context”; cf. Girling, 2021: 23). Traditional theories, approaches or concepts then may not necessarily work anymore, a wide research gap that remains to be filled (Ibidem).

Earlier research was mainly policy driven allowing limited theoretical reflection and generalization until the mid 1990ies when economic and socio-cultural embeddedness of immigrant entrepreneurs was taken up: the embeddedness of immigrant entrepreneurs in social networks and how this enables to spot business opportunities more effectively has thus become a major focus point (Thai and Turkina, 2013; Glinka, 2014). The research field has extended to ”encompass the notion of ‘social value’ [...] and the importance of ‘context’ [...]” (cf. Ram et al., 2017: 2). Advanced studies emphasized the dynamics of social networks and social embeddedness with social capital regarded the (sole) catalysator for successful immigrant business (Storti, 2014; Waldinger et al., 1990; Barberis and Solano, 2018).

Relatedly, major research strands have developed when analyzing immigrant entrepreneurship (Brzozowski et al., 2021):

- The usage of specific ethnic business networks to balance local deficits in cultural, financial, or social capital, i.e., diasporan and transnational networks;
- The creation and development of the ethnic (minority) enclave economy which is a subsection of the host economy from which ethnic entrepreneurs may ultimately break out into the mainstream market to further develop their businesses;
- The economic integration of immigrants and the evaluation of public policies that encourage the inflow of immigrant entrepreneurs and immigrant business creation to enhance entrepreneurial spirit among the native population.

To the focus on the economic side of immigration is considered to be crucial for understanding immigrant groups, their motives, and actions (Brzozowska, 2018; Brzozowski, 2019). Derived from general entrepreneurship, scholarly analysis of immigrant entrepreneurship has increasingly explored on where and why respective opportunities for business creation arise, what their features are, what factors enable their exploitation (Dheer, 2018; Guerrero et al., 2021) and what makes

immigrant business successful (Barberis and Solano, 2018). Furthermore, the analysis of economic benefits for the host economy has received scholarly attention (Malerba and Ferreira, 2020; Garrido and Olmos, 2009; Dheer, 2018; Brzozowski and Pędziwiatr, 2015).

Despite these developments, research has remained fragmented and contextual due to missing comprehensive theory, revealing “a shortage in theory-building” (cf. Aliaga-Isla and Rialp, 2013: 1). Instead, a modelling in favor of mono-causal analysis on micro and individual level through case studies or focus topics has appeared (Klosterman and Rath, 2010). Importantly, these accelerate the understanding of the heterogeneity of immigrant communities and their influence upon immigrant entrepreneurship (Aliaga-Isla and Rialp, 2013; Dabić et al., 2020). However, such rising academic interest increased complexity, “creating challenges to maintaining its focus and intellectual vitality” (cf. Dheer, 2018: 3). Accurate exploration of the phenomena through systematic application of acknowledged research methods have become necessary (Glinka, 2018).

3.2.3 Theoretical approaches to immigrant entrepreneurship

As for general entrepreneurship, the process of immigrant entrepreneurial activity consists of critical dimensions such as business opportunity, business environment, enterprising individual, and modes of organization (Dheer, 2018; Storti, 2014). However, diverse motives behind undertaking immigrant entrepreneurial activity influence its forms, clustering, and type of business as well as development strategies (Brzozowska and Glinka, 2019; Glinka, 2018). Generally, two major (economic) reasons drive setting up immigrant business: For immigrants, engaging into (“other”) self-employment is the only occupational option at the host country despite remaining or (still) being marginalized in the labor market (necessity). For others it is a strategy to avoid labor market marginalization (i.e., very unattractive local job, poorly paid under unfavorable working conditions) and thus aiming for upward mobility, where possible - two contrary approaches of structuralists and culturalists that have over time become combined in interactive modelling (Starnawska, 2012). Nevertheless, immigrant entrepreneurship may have been a long planned and deliberate choice ahead of migration, especially if the future migrant already has a business idea while still being at home. This suggests that choosing entrepreneurship is not always a choice out of necessity but out of (distant) opportunity (Knight, 2015). The latter may hold true especially when the immigrant

already has information about the host business environment and can rely on an established transnational ties, infrastructure, and local networks (Ibidem). Again, others just see opportunities and take the chances (Brzozowska, 2018). For instance, the opportunity hypothesis focusses on related interaction between a migrant's resources, the migrant's community resources (capital, advice etc.) and business opportunity structure in the host country (OECD, 2010a).

The main related contributing theories and theoretical approaches of immigrant entrepreneurship are (Girling, 2022): 1) Ethnic Enclave Theory (concerning high rates of entrepreneurship among migrants and ethnic minorities), 2) Disadvantage Theory (turning to entrepreneurship out of necessity), 3) Mixed Embeddedness Approach (inclusion of agency, structure, and their interactions). With regards to why immigrants take up entrepreneurial activity, one should also include 4) cultural theory as it adds necessary perspective (Glinka, 2018; Brzozowska, 2018). Since these theories and approaches have historically developed from the views of large groups of immigrants leaving the lesser developed economies to the developed economies (Girling, 2022), they have not yet fully been developed for economies with (very) small immigrant groups or (very) small ethnic economies, a research gap which is still to be filled (Brzozowski and Pędziwiatr, 2015; Glinka, 2018). In what follows, the chapter describes these theoretical approaches in detail.

A. Ethnic Enclave theory

One of the first and to date seminal influential general theory of ethnic business was developed in the 1970ies (Ruef, 2010; Zubair and Brzozowski, 2018). Bonacich (1973) developed a model of middlemen minorities who intermediate between different ethnic host country markets (Gurău et al., 2020). The immigrants want to return quickly back home and thus stay temporarily in the host country to maximize financial gains through trade-related or independent businesses. Consequently, they develop strong social and cultural ties among co-ethnics and generally do not integrate fully at the host country, potentially causing a “sojourner mentality” hostile perception (cf. Gurău et al., 2020: 3). Wilson and Portes (1980) and Wilson and Martin (1982) extended the model by introducing the minority enclave theory by which mobilizing resources from the ethnic community develops the enclave further. Waldinger et al. (1990) extend these theoretical approaches by explaining group variations through pre-migratory conditions (human capital), deployment and

evolution of migration and post-migration characteristics (Ibidem). Relatedly, the hypothesis links migrant groups and economic sectors: individual migrants or ethnic groups gravitate into specific occupations or sectors. Respectively, belonging to a minority group is regarded social capital that “facilitates the access of immigrants to independent activities” (cf. Desiderio and Salt, 2010: 18).

Accordingly, similar ethnic groups or groups of similar immigration background (culture, habits, identity, solidarity) form enclaves within spatial, geographic areas from which business needed resources arise, are satisfied and used in order to set up and operate business (Osaghae and Cooney, 2019). Sharing of resources and information - in many cases free of charge among co-ethnics - allow for advantageous low startup cost, quick ramp up and long-term establishment of the business (Jamaludin et al., 2020). The host country market is segmented onto a primary (mainstream) and into a secondary section, the latter with small business in niches involving the minority workers or minority entrepreneurs (Ibidem). The enclave supplies reliable resources to the small business such as co-ethnic hirings that cheapens labor operating cost, provides loans or advice, and is a source of buying and selling products or services thus satisfying specific needs in the host country (Girling, 2022; Brzozowski et al., 2014; Garrido and Olmos, 2009; Glinka, 2018). The labor is flexible and does not expect to be paid like in case of mainstream workers but it receives the status of worker, thus paying tax and social security, however, that status is often not reachable in the mainstream market (Chrysostome and Arcand, 2009; Chrysostome, 2010). Moreover, immigrant business fills labor gaps caused by emigrants, serve knowledge spill over, increase volumes of (cross border) trade, revitalizes certain sectors (competitive pricing etc.), set up new supply chains, create worker demand for services or industries that had not existed before, create new places for leisure and consumption, despite their businesses are often bound in their ethnic community or engage in not very profitable sectors or petty trade (Garrido and Olmos, 2009; Barberis and Solano, 2018; Brzozowski and Lasek, 2019; Glinka, 2018). Consequently, the enclave offers opportunity spotting and realizing necessary for business performance and survival (Osaghae and Cooney, 2019). Through transferring these business ethics to newly arriving members of the community, “perceived uncertainty of the venture” is mitigated (cf. Brzozowska and Glinka, 2019: 27) which is required to reduce uncertainty due to limited knowledge and to prevent from risk of failure (Scheu and Kuckertz, 2022). Once entered into self-employment, it is difficult to change occupation and therefore, there is threat of the entrepreneurial trap (cf. Brzozowski, 2019: 600).

In doing immigrant business, the immigrant entrepreneur is enabled to outperform foreign suppliers of same or similar products or services and thus to sustain business on a longer-term basis (Ramos-Escobar et al., 2022). This creates unique competitive advantage over natives (Malerba and Ferreira, 2020). Low margins keep large firms away from their market (Osaghae and Cooney, 2019). Within their ethnic communities, immigrant business is particularly protected from competition and development on the mainstream labor market. Moreover, regional agglomeration of 'role model' entrepreneurs may further decrease risk associated with new ethnic business, thus increasing start-up rates through spillover effect (Dheer, 2018). Group size, particularly, facilitates start-up rates as the larger the group the easier to acquire capital, to serve a large customer base and thus gain higher profits more quickly (Dheer, 2018). However, these effects are debated since too many entrepreneurs may cause individuals to not enter entrepreneurship (Brzozowska, 2018).

Relying solely on enclave businesses, however, means operating business in conservative structures which hinders business innovation and expansion development. The more segregated an immigrant group is, the more difficult it becomes with regards to economic improvement in forms of upward social mobility (Garrido and Olmos, 2009; Curci and Mackoy, 2010). A breaking out from these circumstances into mainstream market is regarded "progress" (cf. Girling, 2022: 35). Once the products and services are established in the ethnic economy, progress is then sought through integration into mainstream markets (break out strategy) before expanding across borders (internationalization, transnationalism). However, this is only reached through awareness, assimilation, adaption, and integration at host (Malerba and Ferreira, 2020: 1; similar Glinka, 2013: 106). Those who break out of the ethnic enclave economy seem to be more successful than others (Curci and Mackoy, 2010: 109; Starnawska, 2012: 5; Curci and Mackoy, 2010: 109). The more social capital from ethnic communities is used, the more business with co-ethnics arises whereas the more social capital comes from outside the ethnic community the more mainstream business strategy is applied (Dheer, 2018; Glinka, 2014). These strategies pre-set the type of industry and prospects of upward mobility (Dheer, 2018). Relatedly, the level of economic independence is decisive for overcoming exclusion and disadvantages, allowing for "self-negotiation of the terms of participation and competition in the (global) labor market", once desired (cf. Garrido and Olmos, 2009: 207).

However, these traditional perspectives are extended, for instance with respect to popular immigration destination countries such as the UK with its long and diverse immigration history. There, this “old migrant economy” in which immigrants, e.g., from the Caribbeans, rely heavily on co-ethnics to find jobs, finds its place more and more next to the “ethnic economy” by immigrants from, i.e., CEE, who increasingly use employment or institutional agencies rather than ethnic ties to find occupation, especially in the service sectors. They develop to have more in common with other migrants than their co-ethnics (Edwards et al., 2016).

B. Blocked Mobility and Disadvantage hypothesis

Two theoretical concepts require attention: the previously introduced segmented labor market theory¹¹ and the blocked mobility and disadvantage hypothesis (Brzozowski, 2019). With regards to the latter, immigrant (“other”) self-employment is a response to a split labor market situation in which mainstream opportunities are blocked to immigrants. Language barriers, education credentials and discrimination or legal, administrative, financial, personal, and other obstacles such as stereotype perception hinder both the setting up of a business and equal competition in a (hostile) host market (Ruef, 2010; Garrido and Olmos, 2009; Brzozowski et al., 2017; Aliaga-Isla and Rialp, 2013; Vinogradov and Kolvereid, 2010; Brzozowska and Glinka, 2019). Relative to the host country environment, immigrant entrepreneurs are forced to remain small in the ethnic community but also because of the ethnic community (Curci and Mackoy, 2010; Brzozowski, 2017; Dheer, 2018; Girling, 2022; Irastorza and Peña-Legazkue, 2018). This is despite them having the same rights as natives and being treated like them legally. Consequently, they may therefore face worse economic development and show higher failure rates (OECD, 2010; Brzozowski et al., 2014; Reeger, 2018). It is, consequently, the ethnic enclave strategy that surrounds “the core issue in the discussion about immigrants, ethnicity, and entrepreneurship” (cf. Malerba and Ferreira, 2020: 14).

However, Girling (2022) questions whether the above approaches are in fact applicable for immigrants who nowadays purposely turn away from well-advanced “core states” to choose lesser developed countries (i.e., semi-peripheral countries, cf. Wallerstein 1984) to engage in immigrant entrepreneurial activities. It is under discussion whether in these cases a (high) reliance upon co-

¹¹ See chapter 2 “Theoretical aspects on international and return migration” for detailed description.

ethnic social capital is likely to appear, and whether immigrants can be assumed to be disadvantaged or in fact may actually be privileged to not having the obligation to rely on co-ethnics. However, Brzozowski and Pędziwiatr (2015), for instance, extend traditional perspective to such an economy with (very) small shares of immigrant groups (i.e. Poland). They state that immigrant entrepreneurs are forcibly being pushed into the mainstream market and do remain disadvantaged in lack of an efficient ethnic economy at the host country to fall back onto because immigrants lack matching human or financial capital for mainstream market activities (Ibidem).

C. Mixed Embeddedness approach

In explaining and determining the scale and type of entrepreneurial activity, the interplay of social, economic, and institutional context has remained a crucial research issue (Glinka, 2018; Curci and Mackoy, 2010). To go beyond purely US- dominated models, an analytical framework of a Mixed Embeddedness Approach has been developed, applied, and extended by Kloosterman, Rath and van der Leun (1999) when systematically researching migrant entrepreneurship in country specific analysis and opportunity structure (Aliaga-Isla and Rialp, 2013; Dheer, 2018; Starnawska, 2012; Kloosterman and Rath, 2010). Widely applied, the approach has become “the standard reference” (cf. Barberis and Solano, 2018: 3, 8; similar Ram et al., 2016), though it was criticized for being static, more of an instrument for classification than explanation as well as “fuzzy, difficult to operationalize and to verify empirically” (cf. Bisignano and El-Anis, 2019: 974). The topic goes back to Polanyi (1944) according to whom social relations are embedded in an economic system (Kuchenbauer et al., 2020). Respectively, embedded at different levels, in different countries and different social contexts etc., the immigrant becomes mixed embedded (Ibidem). The more the immigrant and the immigrant business become embedded in the host country, the more successful the business will be (Zubair and Brzozowski, 2018).

Distinctively, the approach acknowledges a spatial dimension of a migrant entrepreneur’s embeddedness (national, regional/urban, neighborhood level), super diversity (ethnicity in time and space), and (to some extent) transnationalism (Barberis and Solano, 2018). Embeddedness has an underlying concept of extended places and groups: a migrant’s’ entrepreneurial ties may span over the home country, the host country and other countries (“multifocality”), from groups of co-

ethnics, natives, other immigrants to diasporas around the globe, and these links grow the opportunity structure at the host country sustainably as these are sources of supply in ideas, material, work force, funding, information and such (Ibidem). These environments are dynamic where related processes of embedding, dis-embedding, re-embedding, over-embedding, and under-embedding are interwoven realities among market participant groups (Ibidem; similar Lassalle et al., 2020).

Specifically, immigrants are embedded in their individual, societal and institutional environment when spotting and realizing business opportunities but at the same time they are dependent on and influenced by it (Barberis and Solano, 2018; Scheu and Kuckertz, 2022). Embeddedness elaborates on a migrants' involvement in the migrant's social network and the social-economic and politico-institutional environment in the host country, and therefore plays a pivotal role in host economic development (Agoh and Kumpikaite-Valiuniene, 2018). The interplay between (meso-level) dynamic market opportunities for business and the (micro-level) immigrant entrepreneur is reflected in a respective (macro-institutional) framework approach (cf. Kuchenbauer et al., 2022):

- The Micro level concerns the extent to which a migrant can use critical resources to start a business through a) Structural Embeddedness (configuration of the network) and b) Relational Embeddedness (quality of the network);
- The Meso level concerns the market opportunity structures of migrant entrepreneurs, including the opportunities to start a business successfully;
- The Macro level concerns the institutional sphere, including the extent to which cultural-cognitive institutions, normative institutions, and politico-regulatory institutions either hinder or encourage migrants to start a business.

Applying this framework, the migrant's entrepreneurial function is put in overall societal context for analysis to what extent social, economic, and institutional aspects as well as the interplay between them would affect the engagement of the entrepreneurial individuals at the host country (Kloostermann and Rath, 2018; Kuchenbauer et al. 2020). It thus goes beyond ethnic circles and ethnic markets by looking at existing host local structures both institutionally and socially (Alvarado, 2018; Kloosterman and Rath, 2010; Garrido and Olmos, 2009; Ram et al., 2017). This is done by incorporating the demand side as well as combining agency and structure since business

opportunities depend on market conditions and access of ownership (Ibidem; similar Edwards et al., 2016). The matching process between the migrants' skills, human and social capital as well as opportunity structure and the ability to mobilize resources from all networks reflects the essence of migrant entrepreneurial activity at the host country (Barberis and Solano, 2018; Lassalle et al., 2020). And it is then the type of business and level of embeddedness in a local society that makes a difference between niche business and a large company with growth potential, this influencing the magnitude of economic and social impact (Scheu and Kuckertz, 2022). "Embeddedness is [therefore] key concept in explaining entrepreneurial action" (cf. Lassalle et al., 2020: 6).

The concept especially provides the immigrant entrepreneur with having the possibility to act like the Schumpeterian creative destructor to introduce innovation on small, local scale with a certain growth potential to be successful (Glinka, 2014). This is new since for long innovation in context of migrant entrepreneurship has not much been studied "because of the assumption that ethnic entrepreneurs only have the opportunities to replicate business activities within ethnic markets" (cf. Alvarado, 2018: 90-91). However, the application of human capital (related to innovation) in the host country differs from the home country situation: due to a mismatch and imperfect transferability of human capital from the home to the host country, skills acquired by the migrant produce similar work trajectories at the host country. Since migrant entrepreneurs to the majority display business ideas based on their previous experiences from the home country, some of these ideas are new and will indeed be innovative to the host market allowing for unfolding (Schumpeterian) innovation potential through spill over. Those who truly innovate or adapt early to innovation are followed by those who are less innovative ("S-shape distribution", cf. Alvarado, 2018: 95). Immigration policies should thus foster mixed embeddedness and innovation opportunity (Ibidem). This is important also from the perspective of returnees: from these institutional settings, they may encounter opportunities such as extending human capital but also disadvantages in form of downgrading which influences identification processes in the host and also home country, and thus respective levels of embeddedness (Stahl et al., 2024).

With reference to the relational embeddedness, social capital plays a pivotal role in occupational trajectories of individuals (Andrejuk, 2016). Besides family, friends and the home society, the sources of social capital in immigrant cases encompass the ethnic community and host society,

though all of them “substitute for each other and facilitate each other’s procurement” (cf. Dheer, 2018: 41-42). Ties to friends and family are strong and marked by trust providing for the cheap labor, the required financials, and the reliance on solidarity (“bonding social capital”, cf. Chrysostome, 2010: 138) with the (genetic) ties to the family being the most vital ones (Dheer, 2018). For immigrants with low(er) human capital, the reliance on such social capital is high as they are more dependent of it (and vice versa; Dheer, 2018). Strong cultural ties, community presence as well as exchange of knowledge and advice determine the intensity of support the immigrant receives from these sources (Dheer, 2018; Ramos-Escobar et al., 2022). Immigrant entrepreneurial activities are therefore not solely commercial (Lasalle et al., 2011). However, “bounded solidarity” (sentiment of solidarity) or “enforceable trust” (obligation to abide to societal values in their social structure) limit an immigrant entrepreneur’s freedom (Jamaludin et al., 2020; Thieme, 2006, 15; Portes and Sensenbrenner, 1993). Additionally, for those immigrants who have held return options up during migration or for whom return is easy to realize, social capital will not be developing as much as for those for whom a return home is blocked (Portes and Sensenbrenner, 1993). Those who are, however, unconnected may fail aboard (Smans et al., 2014; Ndofor and Priem, 2011; Kloosterman and Rath, 2010; Storti, 2014; Girling, 2022).

Storti (2014) extends the mixed embeddedness framework. He integrates dynamic entrepreneurial action and its roots as he analyzes the mechanisms whereby immigrant entrepreneurship emerges and spreads. The immigrant entrepreneur becomes an actor with cognitive rationality who judges situations based on rational reasoning, and whose resulting action is simultaneously influenced by both constraints and opportunities which are determined at the micro, meso and macro level. Accordingly, the immigrant’s occupational choice is result of a combination of individual beliefs and hopes as well as available opportunities (micro level). Decisions are made within structures of social interdependence (embeddedness) such as e.g., capacity of (social) networking (meso level). Regulations into a (foreign) market and information about development tendencies (macro level) complete his framework in light of the New Social Economy, Political Economy (market regulations, incentives for entrepreneurial action) and Neo-Institutionalism (institutional environment consists of regulative, normative and constitutive rules) (cf. Storti, 2014: 5).

With a newly developed framework, Lassalle et al. (2020) extend on the concept by stressing the dynamism of embeddedness and by including the effectuation theory (Sarasvathy, 2011): migrant entrepreneurship is conceptualized as the interplay of dynamic processes of embeddedness and related opportunity creation that occur in a rather iterative way (Lassalle et al., 2020). The longer the immigrant entrepreneur is abroad, the relevance of home country networks decreases while the relevance of host country networks increases up to a point in time when the migrant increasingly leverages all resources, including from other networks or ad-hoc partnerships to create and develop (further) business opportunities. In advance to return migration discussion, these migrant entrepreneurs could act as “bridging agents” upon return supporting new (and existing) migrant entrepreneurs to access and widen their networks when searching for business opportunities (Ibidem).

D. Cultural theory

Culture and cultural theories add to the analysis of influential factors on immigrant entrepreneurial activity (Brzozowska, 2018; Ahmad and Hoffmann, 2007). Culture comprises of an individual’s assumptions, adaptations, perceptions and learnings and therefore behavior, attitudes, and effectiveness (Ahmad and Hoffmann, 2007: 16). Cultural theories explore related complexities.

Since racial, ethnic, and cultural identity are part of an individual’s original identity, it is enriched by but also changed through the event of international migration and an increasing host country societal integration (Brzozowska and Postuła, 2022). While living abroad, the identity of immigrants and their labor market activities are shaped through constant ongoing interactions and dialogue with other (entrepreneurial) individuals: local nationals, other minority groups or groups from their own ethnic origin, wherever they may live (Glinka and Brzozowska, 2015; Andrejuk, 2019). Immigrants then build new cultural identity (Brzozowska and Postuła, 2022): the interplay of home and host country values, beliefs, and social norms develop upon available and applicable “cultural heritage” (cf. Glinka, 2014: 99) which affects economic activity, building social networks and self-confidence of the individual but also of entire communities (Brzozowska, 2018).

Being able to construct and express one’s (changing) identity is an important aspect of belonging as it provides a place in society thereby a connection between the self and the society (Van Houte

and Davids, 2008). The metaphor of “home” reflects the level of belonging and influences the graduating process of “becoming” (cf. Brzozowska and Postuła, 2022: 91). Curci and Mackoy (2010) emphasize that integrating is not only a dynamic but more of an iterative process of mutual understanding of the immigrant within his personal background of origin and the host society through actively adopting to settling into the host society and at the same time the opening of the host society towards the immigrant (Kelm et al., 2019). Integration then reflects the degree to which the participants gained knowledge and capacity to build a successful together through factors such as sense of belonging, economic standing (income), social or cultural settings (Coşciug, 2018). Being integrated allows for performing well, though not necessarily equal to natives: it involves circumstances such as possession of occupation, skill match or employment (Kaczmarczyk et al., 2020a). Societal integration at the host country influences entrepreneurial propensity and the way of realization of opportunities (Glinka, 2014). The developing rate of successful immigrant business is result of applying societal and institutional structures (Chrysostome, 2010).

As a result, the cultural dimension in cross border context lifts the immigrant entrepreneur beyond non-immigrant entrepreneurs and expresses its uniqueness as an influencing factor on behavior etc. (Bakker and McMullen, 2023). Initial, or more concrete return plans, however, influence the quality of the application of human, social and financial capital, behavior, investment, and performance at the host country (Wahba, 2022; Adda et al., 2022).

Specifically, cultural distance or proximity affects host country selection (Guerrero et al., 2021: 531). Hofstede (1994) analyzed the dimensions of national cultures out of which uncertainty avoidance and long-term orientation play a decisive role in explaining self-employment propensity: immigrants from less-uncertainty avoiding cultures and more inclined to long-term orientation should more likely be involved in entrepreneurial activities (Szarucki et al., 2016; Starnawska, 2012). Moreover, immigrants from a culture that fosters entrepreneurship seem more prone to take up business, independently of where they go (Brzozowska and Glinka, 2019). These immigrant entrepreneurs may then be analyzed as a distinct group by showing these cultural characteristics which point out that entrepreneurship is culturally attributed to these ethnic groups (Aliaga-Isla and Rialp, 2013; Vinogradov and Kolvereid, 2010). In fact, as immigrants face the same economic conditions at the host country as locals, immigrant group differences then explain differences in

actual immigrant self-employment rates (Vinogradov and Kolvereid, 2010; Szarucki et al., 2016; Garrido and Olmos, 2009). In cases, immigrants transfer home culture characteristics to the host society and rely on their historical knowledge and pre migration experience (Brzozowska and Postuła, 2022). Consequently, home country business trajectories are reproduced in similar set ups abroad which explains why certain immigrant groups set up the businesses types they set up (Glinka, 2018). Some immigrants may, however, choose entrepreneurial activities because they culturally misfit the host country culture and thus may not be able to enter (preferred) wage employment (Ibidem). However, opposite characters to low uncertainty avoidance or high individualism are found may cause a lesser likelihood of institutional support in fostering favorable SME environment (Šimić Banović, 2016).

E. Human Capital theory

It is observed that choosing into business consist along a broad continuum of skill qualification from primary schooling to college to university degrees (Kloosterman and Rath, 2010). The Human Capital Theory (Becker, 1983) has been referred to when analyzing critical characteristics such as skills and abilities of immigrants that they have acquired both at the home and the host country and that are available for current and future application (Gruenhagen, 2019). The theory builds on NE claiming that human capital accelerates migration (Rutkowska-Ziarko et al., 2017).

From the perspective of education, knowledge and skills (human capital) it is, however, not fully clear from research why and with what success immigrants enter into self-employment: the ones with lower levels of human capital because they may not be able to comply with the host country requirements (language, regulations etc.) or the ones with higher levels of human capital that have no interest in self-employment because of lucrative wage employment (Dheer, 2018). However, some may find discrimination (or other disadvantages) at the workplace which pushes them, at the end, into self-employment (Ibidem). Respectively, labor market conditions of the host country such as (non)recognition of education, diplomas etc. (“de-qualification”, cf. Reeger, 2018) guide the self-selection process of immigrants into self-employment (Guerrero et al., 2021). Moreover, premigration experience (skills, work) enable immigrants to pursue business opportunities because labor hiring firms undervalue it and thus do not consider it when hiring into wage-employment

(Dheer, 2018; similar Ramos-Escobar et al., 2022). However, the greater technical knowledge, managerial skills, and fluency in the host country language, the more an aspiration to Schumpeterian entrepreneurship may occur (Dheer, 2018). Additionally, immigrants from educationally advanced nations may learn and apply new rules, policies, structures etc. more efficiently compared to immigrants from lesser developed nations (Ibidem). Overall, strong human capital of both the home and host country offers access to higher value market sectors (Ramos-Escobar et al., 2022: 181).

3.2.4 Persona of an immigrant entrepreneur

Over time, these theoretical approaches have gradually shifted from a pure ethnic perspective to a larger context that recognizes multiple individuals and multiple influencing factors from the surrounding environments of an individual (Gurău et al., 2020). Consequently, a stand-alone analysis of a neoclassical entrepreneur or of an ethnic entrepreneur that is detached from individual aspirations, circumstance and change does not fully capture the characteristics of an immigrant entrepreneur. This is particularly true because entrepreneurial decision making in migration context is often a result of a household collective decision-making process and of the interplay of aspirations, dreams and personal goals of the migrant and his family located both in the host and home country. Respective decisions at the host country are therefore not made purely from an economic point of view but more from a holistic cross border social capital perspective (Ibidem). In the absence of standardization, some central elements associated with immigrant entrepreneurship have evolved: the individual resources of the immigrant entrepreneur (profile, resources), socio-economic embeddedness in various networks (personal, professional, social) and specific entrepreneurial characteristics (mental structures) (Ibidem). The following discussion contains in more delicate manner related peculiarities in order to delineate the immigrant entrepreneur from the general entrepreneur.

According to studies such as by the OECD, most immigrant entrepreneurs are middle-aged (around 35ish and over), just slightly younger than non-migrant counterparts but older than employed counterparts. This is because the immigrant entrepreneur needs to accumulate resources before migration and setting up business (OECD, 2010a). The immigrant entrepreneur is said to be ‘more’ distinct due to prior education and experience making the individual different from local host country population (Ramos-Escobar et al., 2022). The immigrant entrepreneur shows a higher

education level than local non-migrant entrepreneurs in the host country (OECD, 2010a). Through self-selection into migration, the immigrant decided to change country of residence to maximize lifetime utility abroad, and to take the opportunity to make the most of skills, knowledge, and experience resulting in high entrepreneurial motivations, ambitions and capabilities (Dabić et al., 2020). Immigrant entrepreneurs generally stay longer in the host country than employed migrants (Ibidem). Often, immigrant business perform better compared to native ones for which the rate of immigrant businesses may exceed that of the natives. On major reason for this is because the immigrant is more tolerant to risk taking, since migration itself is a risk (Brzozowski and Lasek, 2019; Mahé, 2018; Kushnirovich et al., 2017; Minniti and Levesque, 2008; OECD, 2010a; Naudé et al., 2017; Dheer, 2018, 40; Stoti: 2014; Szarucki et al., 2016; Ramos-Escobar et al., 2022).

Similar to general entrepreneurs, the immigrant entrepreneur creates employment, seeks innovation and impacts the society, and if done successfully acts as a promoter of sustainable economic development for which immigrant businesses are considered “one of the most important economic benefits of immigration” (cf. Brzozowski and Pędziwiatr, 2015: 184). The immigrant entrepreneur runs business either alone or with co-ethnics, workers from other ethnic groups or local workers (OECD, 2010a). Depending on the host market situation, ethnic but also non-ethnic customers are served and cooperation with ethnic or non-ethnic suppliers are established (Glinka, 2013). Immigrant businesses therefore complement rather than substitute local entrepreneurs and may even inspire natives to establish new business (Brzozowski et al., 2019; Kemeny and Cooke, 2018), enhancing an even more entrepreneurial host country society (Brzozowski and Lasek, 2019). However, a migrant’s work effort is higher than that of locals as economic incentives are higher for the immigrant (Wahba, 2022). From niche business, the immigrant entrepreneur usually earns (small) profits with low margins under harsh working conditions; yet, as long there is this demand for respective (ethnic) products and services, these opportunities and profits realize the desired positive income differential for what the economic migrant left the home country initially and trusts it is worth operating the immigrant business. The immigrant entrepreneur is also in this respect distinct from the native entrepreneur (Brzozowski, 2017), and more so as “it is the intensive utilization of such practices that is likely to account for the survival of migrant businesses, sometimes for much longer than their native-owned counterparts” (cf. Ram et al., 2017: 6).

Different to general entrepreneurs, the cross-border migration event enhances the contextual entrepreneurial landscape with regards to the immigrant entrepreneurial processes as these take place in a different reality now: they are built, implemented and developed at the host society based on the individual's (multiple) pre-migratory experience with regards to institutional, social, and economic conditions and therefore, become more specific (Glinka, 2018). Immigrant entrepreneurial activities at the host country are derived from at least two such contexts, though at times completely discrepant (Ibidem). To ease circumstances, immigrants may tend to choose host countries that are geographically closer and with similar social context to the home society (Thai and Turkina, 2013). In these cases, an assimilation strategy is applied by the immigrant (Grzymała-Kazłowska and Okólski, 2003). In more distant cases, the ethnic enclave strategy applies that consists more of isolation and separation to locals, or the surface accommodation strategy is chosen with a functioning at work with little identity reconstruction and acculturation effects at the host society (Ibidem). With the remembrance of the home country market (and culture), the immigrant entrepreneur then exploits new or existing business opportunities that are (more) lucrative to invest in than i.e., by unfamiliar native entrepreneurs (Dabić et al., 2020), as the immigrant best understands the needs of ethnic consumers and suppliers and how these can be satisfied (Dheer, 2018). Respective opportunity recognition is clearly linked to the views of Schumpeter (innovation opportunity) and Kirzner (opportunity arbitrage): entrepreneurial skillsets such as alertness, ability, decision making under risk and uncertainty, (prior) experience and useful knowledge need to be applied sufficiently when developing on business opportunities (Vinogradov and Kolvereid, 2010; Aliaga-Isla and Rialp, 2013: 10; Belt et al., 2015; Dheer, 2018; Ramos-Escobar et al., 2022). Importantly, judgement to entrepreneurial opportunity is derived from what an entrepreneur does but also from who does it, revealing that migration directly affects business judgement (Kushnirovich et al., 2017).

Moreover, spotting business opportunities is further differently recognized between a general and an immigrant entrepreneur as for the immigrant, financial (start-up) capital does not as much influence the set up as social (network) capital does (Jamaludin et al., 2020). Social capital is “the sum of actual and potential resources embedded within, available through and derived from the network of relationships possessed by individuals or social units” (cf. Jamaludin et al., 2020: 94). It relates to cross border and local information flows, trust, and norms, and is situated at the host

country within geographical proximity (one area, neighborhoods) enabling active and direct social exchanges between the immigrant, their co-ethnic groups as well as local communities at all times (Ibidem) but friends and families or diasporas (Brzozowski, 2017). Such complex set of personal linkages mutually influence decision making (Ibidem). It further influences the (ongoing) process of opportunity spotting with the ties to co-ethnics being the most decisive factor in this respect (Ibidem; similar Dheer, 2018). Evidence shows that the more an immigrant is rooted in his ethnic host country community, the less likely a return to the home country is considered as for instance is in the case of migrant wageworkers (Knight, 2015). This emphasizes “the predictive power of contextual variables in addition to individual variables”, a perspective that goes beyond the pure neoclassical economic perspective (Portes and Sensenbrenner, 1993).

Additionally, immigrant businesses are mostly smaller terms of employees hired with comparable or higher sales per employee, though they usually pay similar wages but less benefits, they operate more internationally or geographically diverse, but they are found less diverse when it comes to industry sectors (Kerr and Kerr, 2020). Furthermore, the immigrant entrepreneurs often operate in the low-value-added sectors because of capital constraints, limited social and human capital, lack of local market knowledge, difficulties in navigating through foreign legal frameworks and legal type of stay (Desiderio, 2014). Most particularly, immigrant business may then suffer from “the liability of foreignness”, that is a competitive disadvantage due to not being familiar with the new environment (cf. Kulchina, 2017: 8). At the same time, the “liability of foreignness” may become a competitive advantage, though more in case of transnational business as the immigrant entrepreneur (as middleman) combines opportunity structure from two economies instead of only one (Gurău et al., 2020). These circumstances may cause the immigrant entrepreneur to actually have lower performance and survival rates than businesses by natives because business opportunity spotting beyond niche markets is limited, though not impossible (Desiderio, 2014). However, the longer the residence in the host country, the magnitude of the obstacles decrease as the immigrant adapts and develops a belonging to the host society (Ibidem). As societal integration fosters self-employment (Brzozowski, 2019), the topic is required to become “of primary importance to host governments” through respective welcoming and integrating policy (cf. Curci and Mackoy, 2010: 108; similar Ramos-Escobar et al., 2022; Gurău et al., 2020).

This is further required as the immigrant entrepreneur is also embedded in broader institutional social networks as comparative judgements about working conditions between the home and host country, the individual perception of and confidence in institutional quality at the host country economy as well as proximity and linguistic similarities impact the immigrant entrepreneur more than the local entrepreneur (Kloosterman and Rath, 2010; EU Commission, 2018). Members of ethnic minorities face specific challenges when it comes to economic integration in the host country, namely in form of disadvantages (racial, geographical, labor market entry etc.), lack of host cultural capital (e.g., host language proficiency, intercultural competence etc.) or lack of home skill and education recognition from pre-migration times (Szarucki et al., 2016). Immigrants may to a certain extent adapt to the host country but may not necessarily integrate economically, thus hardly overcome some of the existing barriers (Brzozowski, 2019). There may be in addition subtle obstacles such as prejudice towards difference but there are also limits to an individual's adjustment potential to host country realities (Ramos-Escobar et al., 2022).

As a result, the difference between the general and the immigrant entrepreneur lies in the migration situation as it makes entrepreneurial life more complex (Glinka, 2018; Storti, 2014). It causes the immigrant entrepreneur himself to hold more and different roles while abroad: he is, firstly, an immigrant, secondly an entrepreneur, thirdly a member of a specific ethnic community and/ or the community and society of the home country, and fourthly a member of the host society (cf. Glinka, 2018: 29). It is him that enables a) the transfer of unique competences into the host country, b) revivifying local communities through the „entrepreneurial spirit” c) boosting specific sectors as well as geographical areas that may be less attractive to entrepreneurs from the host country, d) stimulating economic exchange between the host country and the country of origin (cf. Glinka, 2018: 28).

Consequently, it becomes clear that “immigrants start, operate and sustain ventures in broader context” than general entrepreneurs do (cf. Dheer, 2018: 8; similar Ramos-Escobar et al., 2022). Additionally, values and beliefs in general and business specifically differ between home and host economies and may sometimes provide opposite criteria for innovation: this can be a source of both threat and opportunity “and definitely makes an entrepreneurial process distinct from the one performed by entrepreneurs in their home country”(cf. Glinka, 2014: 99).

3.2.5 Performance and survival of immigrant business

There exists no single or universally agreed approach or formula with regards to performance and survival measurement of immigrant businesses and their development potential (Brzozowski et al., 2014). Limited research exists on the differences between native and immigrant entrepreneurs (Starnawska, 2012). Referring to the neo-classical perspective, risk management, work experience, innovative ideas and educational level are, respectively, influencing factors (Chrysostome and Arcand, 2009). As immigrants are said to be positively self-selected into migration, in possession of distinct human capital from the home and the host country as well as able to take (effective) advantage of vacancies that mainstream left, their business may fare better than businesses by non-migrants (Brzozowski et al., 2014).

Research on immigrant business performance at the startup phase exists but research in performance and survival observation after the initial start-up phase is limited (Irastorza and Peña-Legazkue, 2018). Therefore, whether or not these businesses truly foster a more profitable earning over wage-employment remains, at the end, unclear as research shows contradictory results (Dabić et al., 2020).

Opportunity-driven immigrant entrepreneurs should be performance measured by established quantitative performance indicators such as revenue growth, profit margin, growth in employees, firm size, innovation etc. (Chrysostome, 2010). They relate two major categories: survival and growth indicators (Ibidem). Survival includes age (duration) of business and profitability (profit relative to expenses) while indicators for growth (process of increasing in sizes) include (rising) volume of sale, market share, net profit, number of employees, returns on investments, assets, or sale etc. (Chrysostome, 2010; Naudé et al., 2017).

For more necessity driven immigrant businesses, growth is a difficult factor to rely upon as for instance increasing numbers of employees may be due to bounded solidarity and not because of growing business. Ethnic market size may not be relevant for niche businesses as the ethnic community may not grow in size nor does it get relocated geographically to larger places and thus may remain stable (Chrysostome, 2010). Profit (income) is difficult to rely upon as it is a heavily biased

factor, e.g., immigrant entrepreneurs might not always report real income due to tax evasion or they could have family working time unreported etc. (Brzozowski, 2019; Cieřlik and Dvouletý, 2019). Consequently, “the success of the necessity immigrant entrepreneurs should be measured by survival” (cf. Chrysostome and Arcand, 2009: 5).

Chrysostome (2010) summarizes five categories of survival factors: ethno-cultural factors (that offer advantage to the immigrant over natives with regards to ethnic market access), financial factors (from co-ethnic social networks rather than financial institutions), managerial factors (education, previous experience), psych-behavioral factors (risk aversion, commitment), and institutional factors (incentives, initiatives, policies). Additionally, location (metropole vs rural, commercial business environment), level of urbanization, local support of ethnic business, or demand and supply structures are influential factors on host country business performance and survival (Irastorza and Peña-Legazkue, 2018).

The immigrant family unit, once more, becomes highly influential also with regards to survival as once it has been re-united in the host country upon a more permanent stay, collective integration becomes a must for their survival (Lasalle et al., 2011; Ostrovsky and Picot, 2018).



Length of stay is, additionally, a decisive performance and survival factor as with increasing (migration) duration, the individuals mature along the integration process into the host country society – however, many businesses are set up at entry into the host country when none of the capital or experience has developed which may cause high early failure rates (Brzozowski, 2017). Moreover, with increasing migration duration, the profile of immigrant and non-immigrant business show increasingly similar profiles, i.e., they converge, though only when a final settlement in the host country is desired (OECD, 2010; Brzozowski, 2019).

However, understanding how one’s own business generates profit helps to become and to remain profitable since profitability is regarded an important source of internal financing (Siekelova et al., 2019). Established immigrant businesses may either remain with the initially chosen business model or receives adjustment to ensure survival until a return to the home country is realized (Brzozowski, 2017). The classification of immigrant business types presented below explains

maturing business integration on the market(s) that allows for strategic ahead planning of the immigrant for their long-term establishment (Brzozowski and Pędziwiatr, 2015; Lasalle et al., 2011).

Accordingly, the higher the category number, the higher the immigrant-owned business level of integration into the host market. Depending on levels of integration, business development and outlook, it might be lucrative for the immigrant entrepreneur to move from one to another category to sustain or expand the business through exploring and realizing new opportunities (Curci and Mackoy, 2010). Lasalle et al. (2011) suggest diversification strategies with regards to supplier networks, greater customer base, larger and more diverse geographies etc. Additionally, applying intercultural and language skills along with accrued human, social and entrepreneurial capital, the more the business may expand from niche to mainstream markets (Dheer, 2018). Enhancing resources and abilities along with the development of an adaptive behavior to internal and external factors as well as strategic location (populated, urban) and industry sector decisions (turbulent sectors) secure and extend duration of the business (Irastorza and Peña-Legazkue, 2018).

Table 3: Types of ethnic minority entrepreneurs, business classification, success strategies

		From serving ethnic customers to serving mainstream customers 	
From ethnic products and services to non-ethnic, mainstream products and services		Enclave-Market Entrepreneur who serves own community; highly segmented (i.e., ethnic food market)	Middleman Entrepreneur who is either an immigrant self-employed and serves non-ethnic customers or an entrepreneur who sells ethnic products and service to mainstream customers; market integrated (i.e., ethnic restaurant)
		Niche Entrepreneur who sells non-ethnic products or services such as financial services, legal aid or other to own community; product integrated (i.e., real estate)	Mainstream Market Entrepreneur who sells non-ethnic products and services into mainstream market and are a direct competition to local entrepreneurs; highly market integrated (i.e., construction firm)

Sources: adapted, and based on Brzozowski and Pędziwiatr (2015), p. 185; Lasalle et al. (2011), p. 180; Curci and Mackoy (2010), p. 109.

For economies without developed ethnic economies, Brzozowski and Pędziwiatr (2015) linked these transitional scenarios to the length of stay at the host country and thus age of business as the evolution of a business is closely connected to the integration of the business owner. Immigrant businesses in the split labor market or at the far end of the mainstream market develop from highly segmented into either market-integrated or product-integrated sections, followed by being highly

integrated, i.e., when the immigrant entrepreneurs serves both ethnic and non-ethnic customers (Ibidem). Through applying new ways of operating business and new combinations of information, resources, and skills, the immigrant becomes innovative (Zubair and Brzozowski, 2018).

In lack of sufficient (cross border) data collection systems, it remains rather unclear how many immigrant businesses fail after what periods of trial since mainly the “survivors” are recognized (Brzozowski and Lasek, 2019; Brzozowski, 2017; Curci and Mackoy, 2010). However, immigrant entrepreneurs, especially, “must strive for success even while balancing two cultures” (cf. Ndofor and Priem, 2011: 791) as they are said to be self-selected for success because of being more able, ambitious, and entrepreneurial than non-migrants (Crockett, 2013; Mahé, 2018). This is especially true when (“other”) self-employment was their ultimate occupational choice under risk and uncertainty, and business failure would mean failure of the immigration project (Chrysostome, 2010). Immigrants need strong internal motivation to succeed in the host society, and therefore accept “fierce competition, small profit margins and limited growth prospects” (cf. Ramos-Escobar et al., 2022: 171). Through commitment and determination, the immigrant must cope with the disadvantaging challenges at the host country (Chrysostome, 2010). Respectively, the individual context plays an essential role in immigrant entrepreneurship (Scheu and Kuckertz, 2022).

For the following outlook on returnee entrepreneurship, extending business scope by e.g., transnational entrepreneurship improves and sustains current immigrant business but also prepares for successful return as it implies maintaining business not only in and from the host country but at the same time with the home country (Brzozowski et al., 2014). Access to transnational networks allow extended access to financial, social and human capital as well as crucial business information by facilitating the recruitment of skilled workers at lower cost, the set-up of partnerships needed for a new project, product or supply chain, and the exploitation of flows of knowledge and technology between the business partners (Brzozowski et al., 2014; Faist, 2000). The magnitude of ongoing embeddedness in the home country affects overall business performance and thus survival of the immigrant business at the host country (Naudé et al., 2017). Relatedly, the macroeconomic and microeconomic characteristics of the specific home country plays a decisive role. If positively perceived by the immigrant entrepreneur, transnational business becomes a valuable back-up option in case of economic difficulties at the host country, and a “safe haven in the case of a possible

return migration”, especially for immigrant entrepreneurs with explicit homeland orientation and future home income security (cf. Brzozowski et al., 2014: 552).

From host country perspective, losing successful immigrant entrepreneurs due to return migration has significant (macroeconomic) effects to the host economy, as discussions show for large economies with a high share of them: if there are no signs of the remaining local population to balance out these losses, return migration becomes “a problem” of how to fill the gaps (Kauffmann Foundation, 2011). The selectivity of returnees is again fundamental to the performance of an economy, especially with regards to the remaining immigrants and their assimilation (Wahba, 2014). Return migration of the more skilled individuals among the migrants makes the remaining immigrants over time less and less skilled with impact to the magnitude of host productivity, growth, and revenues (Rooth and Saarela, 2007: 91; similar Wahba, 2021: 6, 8). If the unsuccessful leave, the host society gains financially (less commitment for social spendings etc.) but even those vacancies may need refilling to some extent, notably on the segmented labor market. Entrepreneurship policies should thus aim to support entrepreneurial individuals throughout their full life cycle and should including vulnerable groups such as migrant entrepreneurs (EU Commission, 2022). True “government-backed policies” often already include educational modules on topics such as networking, business planning, or management (Ramos-Escobar et al., 2022).

Based on the above discussion, table 4 provides a comparison of a general to an immigrant entrepreneur which will be extended in the next chapter by characteristics on returnee entrepreneurship.

Table 4: Comparison of a general to an immigrant entrepreneur, major characteristics

General entrepreneur	Immigrant entrepreneur
Alertness (i.e., Kirzner), arbitrage (i.e., Cantillon, Kirzner); risk-taking under uncertainty (i.e., Cantillon, Knight, van Mises), decision making (i.e., Marshall, Menger, Schultz), SME establishing by opportunity or out of necessity (i.e. Schumpeter, Knight) , innovation potential (i.e., Bentham, Schumpeter, Weber), financial requirements (i.e. Smith), stock of knowledge to be applied efficiently (i.e., Say, Sombart, Kirzner), opportunities (i.e., Hayek)	
	Higher entrepreneurial activity, more educated, active in ranges of occupations/ sectors, lower survival rates, credit constraint, propensity into business depends on country of migration origin, self-selection; (Mestres, 2010)
Active in primary and/ or secondary economy	Active more in secondary economy of the host country, strong efforts to reach blocked mainstream market
Embedded in one society	Embedded in at least two societies (“mixed”); preparedness and readiness count, cultural heritage extending
Geographically unlocked	Generally geographically bound to ethnic communities
Human capital (knowledge, skills) acquired in home country	Human capital extended by migration experience Potential downgrading, unused human capital from home
Financial capital more decisive	Social capital more decisive
Permanent business character, different types of SME	Temporariness of stay, limited business duration, rather niche businesses
Liability of newness, liability of adolescence	In addition, liability of foreignness
Profit seeking	Migration target seeking (smaller profit, savings, etc.)
Competition on the market	Complement to local business, competitive advantage from ethnic businesses
Traditional business performance and survival factors apply (growth in turnover, number of employees etc.)	Level of host country integration counts, survival (age of business and profitability) is decisive
Home country policies apply	Host country policies apply that need to target vulnerable groups to be effective (programs, funds etc.) In transnational cases: also home country policies apply

Source: own elaboration

3.3 Returnee entrepreneurship

Due to migration experience, immigrants are said to be ‘more’ prone to another migration such as return migration because they have a better understanding of how related processes work, of the income situations in the involved countries, about living conditions, institutional set ups, or how to make use of or expand established (transnational) networks etc. (Constant, 2021). The following section extends on returnee entrepreneurship as an occupational choice by returnees upon return.

3.3.1 Definition of key terms and concepts

There are no universally agreed definitions on terms like returnee entrepreneur etc. (Grosu, 2015). In fact, many scholars still need to provide definitions (Gruenhagen et al., 2020). The largest influence is derived from studies in countries such as China (Grosu, 2015).

In early definitions, the returnee was more of a scientist or engineer, i.e., of higher education (Gruenhagen et al., 2020). More recently, Obukhova et al. (2012), for instance, understand returnee entrepreneurs as (any) return migrant who establishes new business in the home country after working in developed economies. Other scholars regard a returnee entrepreneur as a return migrant who comes back to the home country in order to be an entrepreneur for occupation (Akkurt, 2016; Ahuis et al., 2017). For the latter, Rudaku et al. (2023) suggest the term returned entrepreneur when entrepreneurship has rather been a lifelong trajectory for the individual. While in the first definition the reason for return is not per se the establishment of business upon return, the other definitions imply setting up business as (more or less) sole reason for return. However, the returnee becomes an entrepreneur firstly based on a choice into return and secondly based on a choice to setting up business, two conscious decisions that may be independent of each other, be variously interconnected, be successive or coincide, yet such interwovenness has not been fully researched by scholars (Gruenhagen et al., 2020). There is, moreover, lack of consent on the direction (Gruenhagen et al., 2020) or the duration of times abroad (Filatotchev et al., 2011). Through the creation of successful entrepreneurial ventures upon reintegration, the term is associated with notions of “agent of development” (Riaño, 2023) or even “agent of change” to the home country (Gruenhagen, 2018; Vercauteren, 2019; Mejia et al., 2019).

There is also no explicit definition of a returnee entrepreneurial firm (Bai, 2017). In line with literature, it is understood as the new business created by a returnee (Ibidem). Further, literature has focused on two different types of returnee entrepreneurial activities: own account workers (similar to “other self-employed”) or entrepreneurs with employees (Gruenhagen et al., 2020). The final set up depends on individual context through migration experience, skills acquired, amount of financial capital, or social and economic circumstances at given times (Ibidem).

Return entrepreneurship occurs when returnee business is in fact launched and run (Malerba and Ferreira, 2020; Ramos-Escobar et al., 2022), irrespectively of where the returnee returned from, i.e., from less developed or developed countries, or movements that occurred between the countries at the same level of economic development (Dheer, 2018; Gruenhagen et al., 2020).

For the purpose of this dissertation, a returnee entrepreneur is a return migrant who comes back to the home country after emigration and who choose for occupation into setting up business in the home country at some initial re-adaption time after arrival in the home country, independently of anticipated or actual business duration or performance¹².

3.3.2 Research field

Evidence on the economic impact of return migration on a home country economy has for long been understudied by scholars as a strong focus laid on migrants leaving their home country with what consequences for the host society and not so much for the home society (Wahba, 2014; Brück et al., 2018), despite of increasing return migrant flows (Ndreka, 2019) or remittance flows and migration savings accumulation during emigration. The World Bank reports on remittance flows towards low- and middle-income countries to have reached 630 billion USD (2022) and with regards to diaspora savings, estimates amount to more than 500 billion USD (2012) for developing countries (Akay et al., 2018). Such investment potential has been discussed among scholars at home countries mainly from a policy making perspective (Croitoru and Coşciug, 2021). Empirical results are, however, mixed as to whether or not remittances in fact lead to setting up business (Naudé et al., 2017). This is because they are considered migration cost and thus vary per migration

¹² This definition complements the statistical one provided in the introduction, where a returnee is an individual who had emigrated for work purposes for at least 3 consecutive months and was residing back in Poland at the time of the survey.

project (Wahba, 2021). Additionally, remittances may be used for home country consumption making the recipients reluctant to economic activity (Vercauteren, 2019). Moreover, it may be rather migration savings that ignite the set-up of business upon return (Bilecen, 2022), however only partially as part of the savings amount are used for consumption (Vercauteren, 2019).

One broad strand of literature on return entrepreneurship looks at free and volunteer return migration. Through economic modelling of migration, it defines ways in which returnees mobilize resources acquired abroad in order to achieve economic mobility upon return (Hagan and Wassink, 2020; Brzozowski and Coniglio, 2016). Topics such as decisions into return migration, related processes, or factors of societal reintegration as well as the economic impact of return migration have increasingly been analyzed (Battistella, 2018; Mahé, 2018). The other strand concerns with the actual re-integration processes, performance and impact of changing political realities that are additionally shaped by involuntary and forced return (Brzozowski, 2011; Hagan and Wassink, 2020; Brzozowski and Coniglio, 2016). Specifically, research on returnee entrepreneurship has remained mostly micro-oriented (Gruenhagen et al., 2020) with findings scattered and evidence on research questions rather mixed (Martin and Radu, 2012; Mreji and Barnard, 2021).

Following massive return migration, a very strong geographic focus in scholarly research lays on Asia and China in particular, and its high-tech industries most specifically (Ibidem; similar Akkurt, 2016). However, as migration has become characterized by new migration routes, patterns, and forms in terms of circular, temporary, liquid, or free movement as well as other phenomena such as transnationalism, these have notably been studied since the EU enlargement in 2004 and 2007 and particularly in CEE context (Favell, 2008; Kohlbacher and Matusz Protasiewicz, 2012; Gruenhagen et al., 2020). More recently, new migration routes towards the lesser developed countries are under research as transfer of knowledge especially to these countries bears great potential for their economic development (Gruenhagen et al., 2020). Enhanced interest of the relation (nexus) between (return) migration and country of origin development arose also in light of the global financial crisis in 2008 (Battistella, 2018; King, 2022; Brzozowski and Coniglio, 2016).

Remarkably, over the past decade, there has been a noticeable increase in the publication of articles on return entrepreneurship in recognized research. From the beginning, these publications have

analyzed topics such as propensity into self-employment while on topics such as firm performance only in more recent years (Gruenhagen et al., 2020). When it comes to analyzing the propensity to become entrepreneurial upon return, research topics have more in depth elaborated on topics of human, financial or social capital as determining factors. The longer the migrant had stayed abroad, the higher is proof of a choice into (micro, other) self-employment upon return (Naudé et al., 2017; Wahba, 2014). This also holds true with regards to the u-shaped relationship between formal education and self-employment: individuals with higher education positively select into self-employment upon return to maximize the returns to their human capital investments while individuals on the lower end of education acquisition gravitate towards self-employment for necessity reasons (Cowling et al., 2019). With regards to the degree of self-employment, different types of returnee businesses into different sectors have emerged (Gruenhagen et al., 2020). Knowledge spill over and transfer have, in fact, proven to bring innovation to the home economy (Ibidem).

Concerning performance and survival, the comparison between returnee businesses and non-migrant business has established standard (Mahé, 2018; Gruenhagen et al., 2020). Accordingly, some few existing studies show slight positive performance of being self-employed upon return in CEE countries (Martin and Radu 2012), but also for Egypt (Wahba and Zenou 2012), or Tunisia (Mesnard 2004) (Hagan and Wassink, 2020). For outcome measures, however, the topic is understudied in literature (Gruenhagen et al., 2020; Vārpiņa et al., 2023). Research has further investigated return entrepreneurship in institutional context as it influences and frames return migration and occupational choice upon return (Gruenhagen et al. 2020).

3.3.3 Theoretical approaches to returnee entrepreneurship

Nevertheless, there is no stand-alone theory or theoretical approach to return migration entrepreneurship, much less standardized tools to capture statistically international return migration and occupational choices of returnees upon return (Battistella, 2018). Moreover, some literature does not even specify any theoretical basis in their works (Gruenhagen et al., 2020). For certain geographies as CEE this is because of high dynamism in the new patterns of migration (Croitoru and Coşciug, 2021). Indeed, and due to heterogeneity and overlapping with other research fields, it remains rather feasible to not call for a stand-alone theory but to research in broader context within the domains of entrepreneurship, international business, or management (Gruenhagen et al., 2020).

Sinatti (2022) finds for the discussion on return migration, entrepreneurship, and development two scholarly strands: the more state-centered approach that frames the discussion from above through policy making while the migrant-centered approach involves practical experience etc. and thus frames from below (cf. Sinatti, 2022: 344). These two strands should unite in order to fully exploit the power of the macro and micro approach for a holistic understanding of the complexity of the phenomenon in question, and to allow for a meso level approach. The role of returnee entrepreneurship then becomes more than just mobilizing migration related capital but true contribution to societal development (Ibidem), possible through the great potential of transfer of knowledge through spill over, innovation or internationalizing (Gruenhagen et al., 2020). Alike to immigrant entrepreneurs, returnee entrepreneurs may pull non-migrants into labor participation, contributing to a more entrepreneurial society (Hausmann and Nedelkoska, 2018).

Though because structural factors for return migration are not yet fully revealed by scholarly research, it is still to a great extent the complementary and not the self-sustaining distinction between opportunity-driven vs. necessary-driven entrepreneurs that surrounds important research questions as to who returns, why and with what consequences in order to draw economic, societal, or institutional consequences from return migration (Croitoru, 2019). While for the returnee consent has been found on main characteristics such as personal traits, resources, and level of preparedness (Vercauteren, 2019), there is an obvious gap in literature that focusses on returnee entrepreneurs' characteristics (Akkurt, 2016; Bai, 2017). For scholarly analysis, some features have been adapted from transnational entrepreneurs due to similarities in their characteristics, though acknowledging their differences (Akkurt, 2016). Other scholars consider them distinct as the locus of entrepreneurial activity and therefore degree of embeddedness differs (Bai, 2017). Specifically, ethnic entrepreneurship is linked to high host country embeddedness while returnee entrepreneurship is linked to higher home than host country embeddedness, and transnational entrepreneurship is high in degree of embeddedness at both the home and the host country (Ibidem).

Respectively, with regards to returnee entrepreneurship, researchers apply existing theoretical frameworks as follows: 1) social capital theory, 2) knowledge-based view, 3) human capital theory, 4) institutional theory, 5) network theory, 6) NELM, and 7) cultural theory (Gruenhagen et al., 2020; Ahuis et al., 2017; Akkurt, 2016). The next sections therefore extend on previous discussions and selects specific aspects to develop a persona returnee entrepreneur.

3.3.4 Level of entrepreneurial propensity of returnees compared to non-migrants

Research suggests differences between migrants and non-migrant entrepreneurs (Gruenhagen et al., 2020). Moreover, returnees as a group have much in common, yet there is “within-group variation” (cf. Bai, 2017: 34).

Though migrants are risk takers, they might have likely earned better wages than non-migrants anyways or started a business even without migration (Grabowska and Jastrzębowska, 2023). When in lack of information of their productivity level upon return, it becomes difficult for returnees to be hired as workers and therefore they tend to open business, oftentimes in the secondary or informal markets (Gunewardena and Seck, 2020). There might, however, be a preference for the informal sectors as there is a low degree of regulation which allows for quick start up (Gruenhagen et al., 2020). Piracha (2015) adds that such returnees may show a desire to develop their business towards the formal sector. El-Mallakh and Wahba (2021) find upward social occupational mobility among the highly skilled individuals. De Coulon and Piracha (2005) find premiums from migration experience exist, i.e. there is a return on investment. Brück et al. (2018) find return migrants opting for self-employment upon return in cases on more temporary basis suggesting self-employment to be a “parking lot” before entering wage-employment. Van Stel et al. (2014) argue that the more the home country economy develops, the larger firms appear and the less need for small businesses arises, however, convenient subcontracting or outsourcing to self-employed individuals re-incentive start up rates. Barrell et al. (2007) refer to studies that find returnees to be more productive than natives due to migration experience (Barrell et al., 2007, similar Jephcote, 2022). Kerr and Kerr (2020) report that more UK immigrants started a firm there compared to UK natives. Vārpiņa et al. (2023) also show that the share of entrepreneurs and self-employed can be higher among returnees than among the local population without foreign experience. Zulfiu and Adnett (2021) show that both male and female returnees may opt into business.

Additionally, having worked in developed countries has equipped returnees with advanced (economic) knowledge than that found locally at return to lesser developed countries which makes returnees, along with spillover effects, rather complements than substitutes of non-migrants (Hausmann and Nedelkoska, 2018). Iara (2006) confirms for CEE that male returnees receive migration

premiums on the home labor market, though in relation to positive self-selection for emigrants and returnees. The returnee has, in fact, some opportunity to bring change to practices at the home country (Gruenhagen et al., 2020). Furthermore, enhanced social capital across borders enables returnee business to follow an early internationalization or even globalizing strategy, and thus to gain ‘more’ competitive advantage, in cases right from the beginning (Gruenhagen et al., 2020; Akkurt, 2016). However, this path is influenced by domestic demand and barriers to internationalization (Gruenhagen et al., 2020).

Labor migrants usually set up returnee microenterprises for (other) self-employment (Bai, 2017), further influenced by the following factors that are different to that of local entrepreneurs and thus influence the propensity into business differently, e.g.,

- The propensity to set up business upon return is higher for returnees from host countries with higher earning potential and types of skills acquired (Martin and Radu, 2012);
- Having a return migrant in the family seems associated with increased probability of owning a business (Batistella et al., 2017);
- The type of business is expected to be different to established firms because the new business depends on the entrepreneur’s established interpersonal, cross border relationships (Bai, 2017).

To be successful, the returnee entrepreneur needs a more business generalist rather than a specialized skill mix profile (Lazear, 2005; Mahé, 2021). The entrepreneurial process remains highly knowledge-focused with an underlying need to transform and make use of it actively and consciously (Bai, 2017: 24). The more tacit and contextual knowledge the returnee holds and applies, the better for business performance and survival (Croitoru, 2019; Vārpiņa et al., 2023). As such, returnees are said to (positively) differ in their propensity to start business upon return compared to other individuals (Mahé, 2018; Croitoru, 2019), however, the magnitude depends on whether or not skills acquired are in fact applied effectively (Brzozowski and Coniglio, 2016).

Despite these SMEs being seen as an option for jobs and poverty reduction, Martin and Radu (2012) find that in cases, return migrants actually prefer to initially not participate in the labor market, especially in the first year upon arrival which adds up to a three times higher unemployment rate of returnees compared to non-migrants. They furthermore find for their sample a choice

into self-employment among returnees but no differences in the average self-employment rate between non-migrants and returnees in the first year upon arrival. Gibson and McKenzie (2012) find that although returnees deploy extended knowledge, they are not more productive as entrepreneurs. De Coulon and Pirarcha (2005) find that returnees are negatively self-selected and underperform compared to non-migrants. Brzozowski and Coniglio (2016) find for returns with failed migration projects that the gains from migration are then at best modest. Additionally, repeated skill waste might cause economic inactivity: if acquired home country education was not used during emigration, and skill acquisition during migration is also not used upon return, then there will be no motivation to deploy the ‘more’ (Brzozowski and Coniglio, 2016).

Though migrants may often be seen as “super entrepreneurs” (Naudé et al., 2017), in lack of widely confirming empirical robust evidence, these linkages, however, need to be viewed more nuanced, since migrants may, in fact, not be in all cases more entrepreneurial than non-migrants, not use remittances and saving (exclusively) for start-up investment, not bring and apply valuable skills from abroad (Ibidem), or do not have the ability to impact economic development of the home country (King and Kuschminder, 2022; Wahba, 2014). In cases, migrants may impact more sustainably as employees rather than (necessity) entrepreneurs, however, the magnitude of occupational choices depend on the state of the economy in which each migrant is embedded in (Naudé et al., 2017). Also, it may not be fair to burden development onto returnees by governments as a replacement for not actively designing effective return programs (King and Kuschminder, 2022).

3.3.5 Persona of a returnee entrepreneur

As overall research is limited – also in English speaking literature (Akkurt, 2016) - and authors not always providing descriptive information, it is more difficult for the case of a returnee entrepreneur to draw a reliable metaphor persona (Gruenhagen et al., 2020).

Generally, returnees are more likely to be male and older than non-migrants and current migrants (Bensassi and Jabbour, 2017; Vercauteren, 2019). A defined spread of age class is not possible as statistics show mixed results (Akkurt, 2016: 8). A returnee entrepreneur is further and by minimum identifiable by the home and host country combination, industry of returnee business, details on

lifetime education and migration duration to align different research streams and to find common understanding (Gruenhagen et al., 2020). Furthermore, the returnee is in most cases married, and comes from a household of three (Akkurt, 2016), confirming that migration is influenced by household decision making. The returnee does not necessarily have to have been an entrepreneur in the host country or at the home country before migration, as premigration self-employment seems in cases less likely to foster a choice into self-employment upon return (Brück et al., 2018; Tibajev, 2019). Referencing to the general and immigrant entrepreneur, the returnee possesses ‘even more’ enhanced abilities, skills, and ideas due to migratory experience and dual social context but also a deeper understanding of relevant economic and social settings of the home country, e.g., from visits or contacts (Croitoru, 2019).

The most important reasons for return seem economic opportunities at the home country or family reason (Ahuis et al., 2017). The returnee has, on individual basis, accumulated additional overseas business and industry experience (Mejia et al., 2021), knowledge, and skills in predominately English-speaking, developed countries which is of particular value upon return to developing countries (Gruenhagen et al., 2020; Colic-Peisker, 2013).

Moreover, the accumulation of social capital over lifetime and across borders has developed even ‘more’ by time of return. Return allows for a unique maintenance of cross border social ties from the home country which keeps granting continued access to foreign networks and knowledge beyond return. This is especially beneficial in times of advancing technology (Croitoru and Coşciug, 2021). This social capital becomes more of bridging than bonding social capital and leads to competitive advantage over locals and bears potential of internationalization (Gruenhagen et al., 2020).

However, acquired knowledge from at least two cultures equips the returnee not only with competitive advantage over domestic entrepreneurs (both non-migrant and immigrant) but at the same time requires to actively re-adopt to the home country society. If the magnitude of related processes have been to such an extent that re-adaption, re-acculturation and re-integration into the home country society becomes struggling, the returnee faces the “liability of return” (Gruenhagen et al., 2020). The longer the migrants stayed abroad and the more distant the involved cultures were, the more difficult it will be to reintegrate sustainably (Battistella, 2018). As with any migration event,

the timely mobilization of all kinds of resources (“preparedness”, “readiness”) grants and accelerates related processes (Brzozowski and Coniglio, 2016). These, however, differ compared to the process at emigration as migrants would, generally, not expect difficulties when returning home but when emigrating (Gruenhagen et al., 2020). However, the home country society with its economic and entrepreneurial ecosystem has also changed over migration times, and it may already therefore be possible to experience difficulties upon return.

The new firm is then both medium and outcome of entrepreneurial action and that is, once more, based on discovery, enactment, evaluation, and exploitation, though in light of (former) cross border settings (Bai, 2017). The ability to now spot opportunity stem from the returnee’s social, human, financial and experiential capital that was acquired through migration (Dheer, 2018). Change of environments may influence the motivations to recognize and realize opportunities more effectively (Gruenhagen et al., 2020). Distinctively, the business activities of returnees are unique in that as these are - unlike in immigrant, ethnic or transnational entrepreneur cases - are directed mainly towards environment, embeddedness, market, and benefit of the home country (Dheer, 2018; Gruenhagen et al., 2020).

3.3.6 Performance and survival of returnee business

As with other entrepreneurs, “we should not necessarily expect all returnees to be Schumpeterian entrepreneurs” (cf. Croitoru, 2019: 46). Of course, “return for innovation” is the most desired and by policy makers targeted type of return as it is connected with fueling economic growth for the given economy (Sinatti, 2022). Setting up successful business upon return, however, requires a returnee to be convinced of his entrepreneurial abilities for which migration is most supporting if originally chosen for enhancing entrepreneurial abilities and thus innovation (Brück et al., 2018).

Influencing performance and success factors are again the individual factors, i.e., age, family status, gender, networks, work experience, or well-being and satisfaction (Akkurt, 2016). Depending on opportunity structure and deployment chances, developed soft skills such as self-awareness or self-confidence contribute additionally to a successful re-integration process (Brzozowski and Coniglio, 2016). Specifically, higher education of the individual and firm performance are then

positively correlated (Bensassi and Jabbour, 2017: 13). The business will be more profitable when the returnee entrepreneur does not have a side employment job (Akkurt, 2016). A company's age has a positive relationship to survival due to risk-reducing effects over time (Iwasaki et al., 2021; Bensassi and Jabbour, 2017). Two factors drive revenues: larger start-up capital and accumulated experience (Bensassi and Jabbour, 2017). Respectively, due to international entrepreneurial orientation from migration, extended learning, extended social capital and remaining transnational ties, returnee businesses are said to perform better than business run by non-migrants (Mahé, 2018; Gruenhagen et al., 2020). However, their magnitude is a constraint to the amount of migration savings and structures, norms, and conditions of the home country economy (Vārpiņa et al., 2023; Vanhonacker et al., 2014). For those returnees for whom these advantages no longer exist, underperformance towards non-migrant businesses will occur, however, in decreasing extent with rising business duration at the home country (Gruenhagen et al., 2020).

Alike for the immigrant entrepreneur, social capital strives more than human capital, although human capital is a decisive factor, especially for knowledge deployment (Akkurt, 2016). Previous work experience, including different employers or migration, complement the current undertaking (Ibidem). The quality of business relationships directly influences business performance with regards to information access or competitive advantage but it is conditioned on home country institutional uncertainty (Bai et al., 2021). Institutional relationships, respectively, provide for support towards the returnee entrepreneur, especially for necessity-driven returnees through fundings, contacts, policies etc. (Ibidem; Iwasaki et al., 2021). Respectively, also the geographical place of return is decisive: not all migrants return to the place of migration origin but reintegrate (with their families) at different places where there is better opportunity for entering into and running business, i.e., cities (Battistella, 2018). Failures of return in the origin location may cause re-migration of these individuals (White, 2022).

The line between business survival and failure remains fragile, especially for necessity-driven (other) self-employed (Croitoru, 2019). Niche business based on low start-up cost and using one's own human capital is frequently the answer to occupational choice questions upon return, though opportunity-driven entrepreneurs generally receive higher returns to education (Ibidem). In general, state ownership and size of business are threats to survival of small firms, although among

small firms, the larger ones gain more benefits from better institutions (Ibidem). With passing time in the business, the migration related influential factors may, however, vanish more and more, and the performance gradually become measured in the same manner as local SME entrepreneurs (Gruenhagen et al., 2020). Subsequent convergence then establishes between the firms of returnees and non-migrants (Ibidem).

Table 5 extends the previous main findings on entrepreneurial characteristics and circumstances by the ones derived for the returnee entrepreneur. It supports attributes in search of who returned to Poland and whether or not choosing into returnee business was a rewarding choice.

Table 5: Extension table 4 by including major characteristics of a returnee entrepreneur

General entrepreneur	Immigrant entrepreneur	Returnee entrepreneur
Alertness to spot profitable business opportunities (i.e., Kirzner), arbitrage (i.e., Cantillon, Kirzner); risk-taking under uncertainty (i.e., Cantillon, Knight, van Mises), decision making (i.e., Marshall, Menger, Schultz), SME establishing by opportunity or out of necessity (i.e. Schumpeter, Knight) , innovation potential (i.e., Bentham, Schumpeter, Weber), financial requirements (i.e. Smith), stock of knowledge to be applied efficiently (i.e., Say, Sombart, Kirzner), opportunities (i.e., Hayek)		
Active in primary and/ or secondary economy at local market Internationalization potential	Active more in secondary economy of the host country, strong efforts to reach blocked mainstream market	Active in local market, in cases with transnational ties Early internationalization potential
Embedded in one society	Embedded in at least two societies (“mixed”) Self-selection	Re-Embedded into one society but in some cases in two (transnational ties) Double selection
Geographically unlocked	Geographically bound to ethnic communities, incl. middlemen	Geographically locked to areas where opportunities are more sustained available to deploy extended capital, i.e., in cities
Financial capital decisive	Social capital decisive	Social capital decisive, though savings accumulation is distinct resource for business setup upon return
Human capital (knowledge, skills) acquired and deployed in home country	Human capital extended by ‘more’ (migration experience)	Human capital again extended If not used comprehensively upon return: repeated skill waste
Permanent business character, different types of SME Opportunity and Necessity driven	Temporariness of duration Niche businesses Necessity-driven	Permanent business character Nano/ micro-SME Necessity driven SME as “parking lot”
Liability of newness Liability of adolescence	In addition: liability of foreignness	In addition: liability of return
Profit seeking Growth oriented	Migration target seeking Small profit, oftentimes survival	Migration saving usage Profit seeking
Competition on the market	Complement to local business Competitive advantage (ethnic business)	Complement to the market Competition to the market
Traditional business performance and survival factors (Growth in turn over, number of employees etc.)	Level of host country integration counts Survival rates (age of business, profit)	Reintegration is decisive Survival (age of business, profit) Convergence in measures towards traditional performance factors by increased duration of business
Home country policies apply	Host country policies apply that need to target vulnerable groups to be effective (programs, funds etc.)	Home and (potentially) host country policies apply that need to set the environment for returnee entrepreneurship

Source: own elaboration

4 Developments of international migration from and return migration to Poland

To understand patterns of return migration it is important to consider historical perspective (Hagen-Zenker, 2008), especially in the case of Poland with its long and complicated history (Kusek, 2020). For most of its history, Poland was peripheral and lagged behind industrialization (Piatkowski, 2021). Before the end of the 18th century, no large-scale Polish migration movements occurred. From the First Partition of Poland in 1772 up until the end of the 1930ies, some 12 mill labor migrants had left Polish lands, for both political and economic reasons (Burrell, 2013). Moreover, through postwar, post communism and EU accession by and after 2004, migration opportunities arose making the Polish to be recognized the most mobile nation in Europe (Isanksi et al., 2013 Kaczmarczyk et al., 2020a; IOM, 2004), confirming a high propensity of the Polish into migration (Okólski, 2021). By the beginning of the 21st century, some 20 mill people in more than 90 countries claim Polish ancestry, which is nearly half of the population of the Polish Republic (van Heuckelom, 2019). It is therefore safe to assume that “migration has become inscribed in Polish tradition as a popular, rational and effective livelihood strategy”, forming a distinct “migration culture” (cf. White et al., 2018: 17-23).

These developments have for long attracted attention of politicians and scholars to analyze both political and economic consequences of migration in historical and contemporary perspective (Walaszek, 2002) with their outcomes linked to each other (Grosfeld and Zhuravskaya, 2013). In what follows is therefore the historical outline of migration developments concerning Polish territories with the aim to further develop the persona metaphor, more specifically to the Polish case.

4.1 Historical milestones in Polish history and migration context

4.1.1 From the partitions as of 1772 to 1945

A. 1770ies to 1918: Times of partitions towards state formation

By the 1770ies, the multi ethnical Polish-Lithuanian Commonwealth, quite uniquely, had consisted of 11 to 14 mill inhabitants of ethnic Poles, Ukrainians, Lithuanians (Ruthenians), Russians, Estonians, and others (Bideleux and Jeffries, 1998; Davies, 2005; Łukowski and Zawadzki, 2001; Roos, 1968). With regards to economic development, corn farming in the Southern area backed up the aristocracy that focused on inner strengthening of the local economy (Heyde, 2017). Upper north-west, mainly livestock breeding for the textile industry served for economic development, especially in and for the bigger cities providing ground for a development of a bourgeoisie. Hence, the areas developed quite differently. As peasants were not allowed to relocate to cities, no significant migration took place (Ibidem). The annual population grew at 0.5 percent p. a. (Borowski, 1975). Recognizable Polish migration patterns ignited in upcoming years when Poland experienced four consecutive partitions splitting the geography of the Commonwealth between the imperial powers of Austria (Habsburg; later Austrian Empire of Austria-Hungary), Prussia (German-Empire) and the Russian Empire. The period 1772 to 1815 is known as the “period of partition” (Zubrzycki, 1953; van Heukelom, 2019).

Inner political paralysis, the aftermath of several wars and Russian hegemony caused a first partition of the territory in 1772 to ease rivalry among the three powers (Heyde, 2017). From inner urges for modernization reforms, a resulting Polish-Russian war ended in regaining Russian upper hand which led to the second partition between Prussia and Russia in 1793. As a reaction, a national insurrection arose against liquidation of the Polish state which led to a third partition in 1795 between Austria and Russia, later Prussia (Ibidem). In lack of reliable surveys, the Polish population on this split territory was hardly recordable (Zubrzycki, 1953; Kamusella, 2017). Based on different studies (e. g. Wandycz, 2001) it is estimated that

- Austria gained ca. 18 percent of the Commonwealth territory with 32 percent of the population (3.85 mill people; similar Kamusella, 2017: 30 percent, 3.8 mill people)

- Prussia gained ca. 20 percent of the Commonwealth territory with 23 percent of the population (ca. 2.6 mill people; similar Kamusella, 2017: 22 percent, 2.7 mill people)
- Russia gained about ca. 62 percent (ca. 80 percent according to Nowak, 2016) of the Commonwealth territory with 45 percent of the population (3.5 mill people; but Kamusella, 2017: 37, 48 percent, 6 mill people).

By 1797, Poland was declared extinct as a state and disappeared from the political map of Europe until 1918 (Heyde, 2017; Krzoska and Kneip, 2019). As a response to these political developments, some 6,000 insurgents left for Western Europe exile or formed a Polish Legion in Italy (Heyde, 2017; Zubrzycki, 1953). The three powers negotiated the “Treaty of Vienna”, 1815 to reshape the territory borders with Russia gaining significant parts from Prussia. This act led to establishing a “Kingdom of Poland” (Congress Poland) on Russian ground with the Russian tsar as the King of Poland. Known as the fourth partition, The Duchy of Warsaw was divided into a Grand Duchy of Posen (Prussian Part), a free city of Krakow, and some parts were given to Congress Poland (Heyde, 2017; Grosfeld and Zhuravskaya, 2013). Afterwards, about two-thirds of the former Commonwealth inhabitants lived in the Russian part, one sixth in the Prussian and one sixth in the Austrian part. Altogether there lived about 6 mill ethnic Poles that split into about 4.5 mill serfs and about 1.5 mill nobles and clergy (Kamusella, 2017).

The partitions impacted sustainably the lives of the Polish population: three different empires supposedly formed their geographic areas with different socio-economic structures and policies that influenced types and characters of Poles with regards to mentality, habits, and way of life (Krzoska and Kneip, 2019; Grosfeld und Zhuravskaya, 2013). Russia established politics and policies that aimed for standardization, conformity, and assimilation (Russification; cf. Grosfeld und Zhuravskaya, 2013: 10). However, it guaranteed the Polish elite advanced fundamental order and self-administration. Their recently established new (inner) unity, local governments, freedom of the press, independent courts or the use of Polish language remained in place, except for schools and churches (Ibidem). In return, the territory and its inhabitants were bound to Russia (Heyde, 2017). Quite opposite, in the Prussian part religious and cultural tolerance characterized life, however, Germanification threatened causing tensions as on the one hand being Polish was to be preserved but on the other hand German efficiency of political and economic institutions were a

gateway into modern life (Grosfeld und Zhuravskaya, 2013). It was therefore Prussia that industrialized the fastest compared to the Russian or Austrian parts, building railway networks and other big scale infrastructure projects helped to enhance economic growth (Ibidem; Koryś, 2018). Despite these positive developments, the overall economic situation remained exceedingly bad with a poor standard of living because agriculture was highly unproductive (Zubrzycki, 1956).

However, increasing mistrust in excess of given guarantees, rising rivalry among the powers and their allies as well as fear of inner revolutions through spillover effects of revolutions in Germany, France or the Netherlands, Congress Polish soldiers were called to fight against Western Europe where Polish emigres lived which caused inner riots and political turbulences. A resulting insurrection in 1831 (November Uprising) enabled Russia to regain once again upper hand that ended Congress Poland (Koryś, 2018). Noticeable emigration migration took place: about 50,000 soldiers, officials and politicians of noble origin and high political and cultural profile decided to emigrate to self-imposed exile to France, Belgium, the UK, Turkey, or the USA (Pacyga, 2005) where they were generally warmly welcomed as the uprising was regarded a new modern spirit against old imperialism (Heyde, 2017). In France up to 20,000 emigrants were accepted as political refugees (Pacyga, 2005) and formed one of the most important Polish exile populations (Heyde, 2017). At the French College in France, for instance, a chair for Slavic language was established to which Adam Mickiewicz, one of the leading influencing poets of Poland and progressive thinkers of the Polish national consciousness movement, was later appointed chairman. Many of the emigrants returned sooner or later, except the political diaspora. Moreover, about 10,000 Polish prisoners were forced to Siberia (Pacyga, 2005; Stola, 1992). In retrospective, these emigrant movements were the first noticeable political emigration movements from Polish land in modern times, despite their small numbers (Zubrzycki, 1953; Zubrzycki, 1956; Tilly, 1976).

At Polish territory, emigration, however, was associated with demographic losses, social sickness, and bloodletting (Walaszek, 2002) but also with nation-state-oriented Poles that were active not only from within but also from outside in politics and social life in order to revive Polish spirit and identity (Burrell, 2013; Pacyga, 2005). Consequently, the self-imposed political exiles of the 19th century became regarded more as a necessary pilgrimage and something unfortunate rather than a finite circumstance, prospecting a return to Polish land at some point as actually “Poles are not

wanderers. Most of the time they stay put” (cf. van Heuckelom, 2019: 21-23). There was little understanding for other forms of migration such as economic migration: it put self-interest over collective interest that was betrayal to the nation (Ibidem; Walaszek, 2002). However, the abolishment of serfdom left a large landless population without land to settle which is why emigration for economic reasons necessarily developed, to about 90,000 by 1910, mainly landless (42 percent) or landed (24 percent) peasants (Zubrzycki, 1956). Economic emigration had become an option under unfavorable circumstances (Ibidem).

Due to further political change and inner riots in the Russian part, a second wave and more consecutive waves of political emigration to Western Europe occurred (Zubrzycki, 1956). Despite, the textile, iron, coal, and leather industry developed since the railway now linked Germany and Russia (Ibidem). Moreover, private enterprises developed dynamically and sizable in the regions of Warsaw, Lodz (“Polish Manchester”) and to some extent of Kalisz due to the inflow of foreign entrepreneurs, investment capital and technologies from Germany, France or Belgium which created with locals a side by side of different race, language, and confession, yet the development distance to Western Europe remained (Koryś, 2018; Heyde, 2017; Zubrzycki, 1956).

In the Prussian part, increasing anti-Polish politics lead in the 1870ies to continued political emigration, i.e., especially because von Bismarck suppressed Polish national consciousness fighting for supremacy of the German culture, especially in the areas of Polish Pomerania, Poznania and Silesia (Zubrzycki, 1956) for which i.e., he resettled German farmers on Polish land leaving the Polish famers homeless, affecting ca. 32,000 peasants, land workers and jews (Heyde, 2017). The agricultural sector in Prussia then developed, however, more prosperously as the downstream industry demanded workforce (Zubrzycki, 1956) causing increasing internal migration towards the richer and better developed provinces and the urban area populations to grow (Koryś, 2018). This development intensified in Upper Silesia through labor immigration into non-agricultural employment from neighboring Austria and Russia and the poorer provinces of Prussia (Koryś, 2018; Tilly, 1976). Additionally, Polish workers went rather freely and for economic reasons to the coal mines in Germany causing economic emigration of about 500,000 Poles by 1890 out of which 350,000 were ethnic Poles (Pacyga, 2005). Moreover, Silesian farmers that had begun emigrating in large numbers from the mid 1850ies onwards mainly to certain areas in the USA, establishing “the fourth

province of Poland” (Walaszek, 2002: 6) and Chicago the capital of “American Polonia”¹³ (cf. Pacyga, 2005: 258), or to Brazil establishing the “fifth province” or even “New Poland” (cf. Walaszek, 2002: 3-6; similar Pacyga, 2005; Araújo-Filho and Brzozowski, 2005).

In the Austrian part, the overall developments of towns or cities happened slower due to its peripheral geographic position, land maldistribution, peasants’ high illiteracy, and agricultural crisis. Related emigration waves left some few urban centers such as Lwow, Krakow, or Przemysl to maintain their function regarding education, economics, or administration (Koryś, 2018; Pacyga, 2005). Polish culture, respectively, could develop freely due to granted autonomy but the lack of industry and capital, backward agriculture and no job opportunities maintained a poor standard of living (Zubrzycki, 1956). Especially a maintained traditional inheritance system retarded economic progress in the agricultural sector: through excessive parcellation, Polish peasants kept dividing their lots between all male children causing each new generation to survive from farming on a smaller piece of land, allowing just little improvement opportunities for increasing sustainable productivity. Furthermore, a newly built railway system brought in products from elsewhere that destroyed the local agricultural trade. The only logical outcome was economic permanent emigration which started as of the 1870ies, especially to Germany (Ibidem).

Such permanent migration was initially labelled “a Polish problem” because it meant a weakening of a Poland that “had to be strong and populous” (cf. Walaszek, 2002: 2). Furthermore, a return and as such regaining demographic losses seemed out of question in lack of a distinct Polish community spirit, lack of strong home country ties and local assimilation at destination being a threat to national feeling. These concerns caused a scholarly dealing with migration pattern from a socio-economic perspective concluding, at the end, that emigrants living abroad should not remain separated but be included in homeland’s life through establishing strong ties that in return could support in developing Poland from abroad. Their use of Polish language, their maintenance of Polish traditions, customs, or religion expressed their belonging to and a longing for their homeland and thus helped building the desired ties, national consciousness, sentiment, and spirit (Ibidem). Furthermore, they established growing business and migration infrastructure abroad: besides peasants,

¹³ Polonia is a synonym for Polish diaspora, often used in Polish literature but also in migration studies. It was used for the first time 1875 in the USA and meant “the imagined community of Polish immigrants in the US (and elsewhere)” (cf. Walaszek, 2002: 5).

many other professionals opened SME in the Polish neighborhood like grocery stores or saloons, ethnic printing businesses or building associations (Pacyga, 2005). Through sending home letters, prepaid travel tickets or remittances they created chain migration (Ibidem). Polish national identity was then getting much stronger the longer the emigrants were away: “wherever a Pole settles, there a piece of Poland is born. Origin forms a nation, not soil” (cf. Walaszek, 2002: 5). At distant Polish territory, Polish diaspora became regarded Poles and highly evaluated as a resource which should rather stay than return home. Therefore, Polish settlement abroad became increasingly a “chance for national expansion and enlargement of the Polish territory” (Ibidem). Despite, potential return migration would cause challenges, especially for the host countries with large diasporas as “massive returns [...] could cause deep economic disturbances” (cf. Walaszek, 2002: 8). This was especially true for the USA with a developed Polish diaspora of up ca. 4 mill by 1918. From Poland’s home country perspective, return migration of such large Polish diaspora was for long debated negatively in order to prevent from it because “it is not time yet. Feverish return migration might be harmful for Poland and for the returnees” (cf. Walaszek, 2002: 11), but also for the host country economy with regards to related labor vacancies (Walaszek, 2002: 12).

Despite, a more seasonal or circular character of migration gradually developed, especially to nearby Germany or Latvia, in order to learn new techniques, gain experience and earn more money for sending remittances home (Zubrzycki, 1956).¹⁴ However, migrants were often treated “second category” with no state protection but working the hardest and worst paid jobs enabling the foreign economy to develop on their expense (Radomska, 2012).

All together it is estimated that somewhat around 3.5 mill people, out of which 60 percent were Poles, left Polish lands between 1795 to 1918, mainly for economic disparity between the home and host economies (Oltmer, 2013; van Heuckelom, 2019; Walaszek, 2002; Heyde, 2017), with another 1.6 mill leaving in the upcoming interwar period (Brzozowski et al., 2020). It is estimated that at some point three out of ten emigrants returned home (Heyde, 2017).

¹⁴ There are no exact statistics for seasonal migration; for instance, from Congress Poland to Germany about 30,000 persons p. a. engaged in seasonal migration by end of 19th century, developing to up to 160,000 persons p. a. as of first decade in 20th century; from 1900 – 1913: 3 mill in total internationally (Zubrzycki, 1956: 23, 24). Those who went seasonal to Germany reached peak in 1913 of 345,000 seasonal migrants (Zubrzycki, 1956: 22, 24).

B. New independence as of 1918 and its end by WWII in 1939 (Interwar Period)

With Russia being defeated in the Russian Japanese war in 1905, socialists undertook revolutionary efforts to liberation while the nationalists stood alongside the Russians for which in return their strong anti-Polish politics was released: Polish language was now officially accepted in schools, freedom of religion was guaranteed, the promise of establishing a constitution and a freely elected parliament were given (Heyde, 2017). The decline of the Holy Alliance gave room for Polish nationalists to consequently pursue own interests in the reestablishment of a single Polish nation with a newly shaped national consciousness across the large Polish lands. After several military actions, governors under German emperor Wilhelm II. and Austrian emperor Franz Joseph declared the establishment of the Kingdom of Poland in 1916 under hereditary monarchy and its own armed forces but without defining border or authority (Ibidem). With the events around the Russian Revolution as of October 1917, Russia dropped out of the Holy Ally which gave way to form borders by the Western allies and, finally, to the proclamation of Polish Independence on 7 October 1918, the “Moment of self-liberation” (cf. Templin, 2018: 2). Marshal Józef Piłsudski took over Polish armed forces on 11 November 1918, known as the day of establishing the Second Republic of Poland and lasting until today as the Polish National holiday (Heyde, 2017). Full independence was internationally acknowledged by the Treaty of Versailles in 1919 (Ibidem). The passed constitution in 1921 characterized the Second Republic as a secular (mundane) democratic republic with building a united state following the basic principles of the French constitution, i.e., separation of powers, especially the legislative (Templin, 2018; Stachura, 1998). The following years were characterized by consolidation and restauration but predominantly by attempts to geographic border shaping, especially in the East and West (Borowsky, 2005). At the time, a diverse, heterogeneous population of about 27 mill people comprised of ca. 65 percent Poles, ca. 16 percent Ukrainians, ca. 10 percent Jews, ca. 6 percent Ruthenians, ca. 4 percent Germans and 1 percent others such as Lithuanians or Czechs that all were regionally unequally distributed in also unequal rural to urban ratio (Heyde, 2017; Radomska, 2012; Stachura, 1998).

With regards to migration, these developments removed the main impetus for political emigration of ethnic Poles (Burrell, 2013). Social insurance and increasing employment provided social welfare aiming for stability in Poland (Radomska, 2012). It seemed time to regulate return migration,

but this chance passed due to re-rising inner social and economic tensions and a population surplus of up to 6 mill people. One solution to solve the latter was granting a right for (economic) emigration (Ibidem). With rising protectionism of other countries, Poland entered into bilateral agreements to secure ongoing labor supply inflows from high developed countries like France or Germany but at the same time to also release emigration (Ibidem; van Heuckelom, 2019). To manage lack of the effectiveness of the bilateral agreements, migration policies, laws or regulations, additional Polish offices and institutions were established but each with different or contradicting ideas of how these should look like and therefore with little impact (Walaszek, 2002).

With regards to return migration in turbulent times, i.e., the approaching Great Depression by the end of the 1920ies, return migration waves occurred to Poland from France or Belgium in extent of 21,000 to about 31,100 between 1926 and 1935 due to increasing unemployment abroad, immigration quotas or requirements of financial means to proof sufficient living abroad (Anacka and Fihel, 2012). Particularly, a potential large scale return migration from Germany caused special political attention because of “mass remigration of radical leftists, communists, criminals, or Germanized Poles” after many years of undergoing “a process of denationalization” which was associated with difficulties to reintegrate to the new “Polish National Democrat’s concept of nation-building” (cf. Radomska, 2012: 113). Regarded an economic burden, the Polish government undertook strong efforts to prevent Poland from receiving mass returnees, especially the (seasonal) German workers with their families were heavily restricted in their legal returns, though illegal migration remained (Radomska, 2012). Through political compromising in 1927, a regulated return migration flow of about 42,000 Poles from Germany was negotiated causing critique that “migration was to be used as a political tool to obtain a guarantee for the Polish-German border” (cf. Radomska, 2012: 121). In 1932, in light of the heavy economic crises, the convention was terminated by Germany, closing its labor market to foreigners (Radomska, 2012).

Rising conflicting political ideas between the nationalists and socialists made it challenging for ethnic minorities to gain economic and cultural inclusion (Templin, 2018). Polish identity and what it (should) encompasses was to a great deal still built and supported from abroad but increasingly also from inside: in its sermons and publications, the Catholic Church defined Polish identity by clear delineation to other confessions of faith (Heyde, 2017). Furthermore, a highpoint of

divergent ideas was reached in 1926 with an impending rise to parliamentary power by the nationalists that almost caused a civil war. Piłsudski advanced to be military leader and took control over the republic leading her under authoritarian centrist regimented structure called Sanacja (but not dictatorship) that lasted beyond his death in 1935 (Templin, 2018). The Second Polish Republic has therefore been severely criticized for its non-inclusive treatment of minorities (Stachura, 1998), although there is “no denying, [...] that Poland’s struggle for survival against overwhelming odds on all fronts after 1918 is a most important factor to be borne in mind when her [Poland’s] approach to the minorities’ issue is considered” (cf. Stachura, 1998: 71). Moreover, during the following years until 1939, Poland faced economic difficulties to integrate lands that had been ununited for more than 120 years: it faced integration of three different civil, fiscal, commercial, and political systems, different currencies, or customs and traditions (Tanas, 2004). However, with respect to business development, SMEs reached fast turnover in skilled and unskilled employment causing falling unemployment rates and rising GDP. The shift from agriculture to modern industry was achieved (Ibidem). Poland became a fast-growing economy in Europe which made Poles more reluctant to emigration (Tanas, 2004; Zubrzycki, 1956; Stachura, 1998; Borowsky, 2005).

From outside, rapid growing anti-Polish political developments through the Stalin imperium or Hitler’s developing vision of large-area Germanification threatened the young republic severely as the victorious powers were not willing to vouch for Poland openly and to resolve open border questions once and for all (Templin, 2018; Heyde, 2017). Germany’s increasing violation of existing agreements, the Hitler-Stalin-Pact and accompanying protocols of land partition and border establishing, Hitler’s attack on the republic and Stalin’s occupation of Eastern Poland sealed the fall of the Second Republic as of 1939, followed by an (interim) hand over of political affairs to Polish exile government in France and later London (Ibidem). These exile governments organized armed resistance across Western Europe and Poland to keep the Polish spirit alive (Heyde, 2017). However, the Polish state was declared extinct on 27th September 1939 by Hitler, later Stalin (Ibidem; Burrell, 2013). The outbreak of WWII thus marked the end of Poland’s independence and free market-based economy until the break-up of the Soviet Union in the late 1980ies (Tanas, 2004). WWII “put a halt to any business activities of Polish firms” (cf. Tanas, 2004: 4).

In what followed is known: participation in war, forced eviction, deportation, killings, dispossessions, industrial atrophy, annihilation of life and war damages resulting in ruined infrastructure and life (Heyde, 2017). About 25 percent of the Polish population was killed in WWII, 12 mill have been resettled, deported, or dispersed around the globe (Brzozowski et al., 2020; Pacyga, 2005). Needless to say, that “this sort of wrenching high mobility caused unfathomable suffering and is not related to economic development as it is normally understood” (cf. Moch, 2013: 4). The Potsdam Conference in 1945 sealed Germany’s defeat while the victorious powers UK, USA, Soviet Union, and France determined border questions (Heyde, 2017). A provisional Polish government was established and “handed to Stalin by Britain and the UA under the terms of the 1945 Treaty of Yalta” (cf. Tanas, 2004: 4). The way into a communist regime was pathed aiming once again for inner unification of the land, both geographically and ethnically (Heyde, 2017). In 1952, the insurrection of People’s Republic of Poland under Soviet influence took place. Unlike before, ethnic minorities were now neglected in a vision of a homogenous population of ethnic, catholic Poles (Ibidem; Maybelin et al., 2016). In 1946, about 20 mill Poles, about 2.3 mill Germans and about 800,000 people of other or unidentified nationalities were counted on Polish ground (Leslie, 1980). The below graphic reflects the border shaping as of 1815 and shows established Polish borders as of 1945 until today.

Figure 2: Border shaping process of Poland 1815 to 1945; Poland situated in Europe



Source: Bukowski and Novokmet (2021), p. 230.



Source: Encyclopedia Britannica (2023)

4.1.2 From postwar times to the fall of the iron curtain in 1989

Once the Allies took over, migration took place: about 3 mill Germans were evacuated from the Eastern Polish provinces and allocated across the four occupation zones, being forced into hard labor at coal mines or industries, e.g. in Germany (Heyde, 2017; Anacka and Fihel, 2012). About 2 mill Poles were relocated from Eastern to Western Polish areas whereas about half a mill Ukrainians, Ruthenians, and Lithuanians were relocated to the Soviet Union. After a severe pogrom in 1946, many Jews fled into exile, e.g. Israel (Ibidem; Maybelin et al., 2016). Polish return migration was visible from Germany, Western Europe, and the USA: about 2 mill Poles returned but also prisoners of war or forced workers (Heyde, 2017; Zybrzycki, 1956). Return migration, in general, could be a means of reversing ethnic cleansing (Van Houte and Davids, 2008). Many of those who stayed were granted Polish citizenship, latest by 1951, which marked the end date of mass relocation (Heyde, 2017). Poland, at the end, became homogenous: 94 percent of the population were ethnic Poles, 96 percent of the population were Roman Catholics, 95 percent of the population used Polish language at home (Grosfeld and Zhuravskaya, 2013; Józwiak et al., 2014: 10). However, with the communist regime installed, Poles abroad did no longer return but settled permanently overseas, or established new diasporas across Europe (Pacyga, 2005; Burrell, 2013).

Under Soviet regime, the introduction of a controlled economy and a socialistic corporate structure ignited postwar Polish economic growth through centralization: a collective work environment with rewarding the working class provided for prospect, stability and security, except in the agricultural sphere where a collective reorganization was possible only in the Northern and Western parts of Poland (“Soviet kolkhoz” - *państwowe gospodarstwa rolne* - PGR) (Heyde, 2017). The government managed about 14 percent of collectivized land, about 86 percent remained in private hands. Importantly, “this resulted in Poland becoming a unique socialist country with a central government and the existence of private entities” (cf. Tanas, 2004: 5; similar Stoica, 2021: 73).

In 1948, the Polish communist Party took over control diminishing most of the formerly achieved democratic values by suppressing opposition rather violently. Also, a decrease in supply of goods and rising inner conflicts caused uprisings in parts of Poland (Heyde, 2017). Moreover, until 1955, border fences were set up to bolt the country (Stola, 2005), making Poland a “country with no exit” (cf. Kaczmarczyk, 2013:1) which is why return for sentiment or for retirement were the mere

reasons to come back to Poland at the time (Anacka and Fihel, 2012). With regards to international migration, the country was relatively locked up to any international travels as passport issuing had become extremely difficult.

These developments caused disempowerment and a change of leadership to Gomułka in 1956 who longed for independence and reforms for modernization, though in acceptance of the communist regime. After Stalin died in 1953, Gomułka eased the total lock up of the country to some extent with regards to the passport politics, causing the number of applications and approvals for a permanent leave from Poland to drastically increase to 30,000 emigrations by 1956 and to 148,000 emigrations by 1957 (Stola, 2005). Most of the emigrants were non-ethnic Poles that were now allowed to move, in most cases to East Germany for family reunions or limited also to West Germany, others went to follow diasporas. However, as the interest in emigration did not pass, the politics had become stricter again as of 1958 but more moderate again in the following years with numbers of 20,000 to 30,000 emigrants p.a. between the 1960ies to the 1970ies (Stola, 2005). In light of the acceptance politics, Gomułka further negotiated orderly return migration of formerly expelled Poles (Ibidem). However, as communist Poland was prevented from participating in the Marshall Plan, there were not enough funds to finance urbanization (Tanas, 2004). Consequently, much of the Polish population remained trapped in small towns and cities forced to commute daily to work to the cities as for instance it was difficult, if not impossible, to get an apartment in a bigger or big city because these were reserved for elites (Leslie, 1980). The degree of urbanization differed from region to region: high in the Western territories, low in the Eastern and Central provinces (Ibidem). Thus, internal migration then became the dominant form of migration (Dziekońska, 2021) while emigration was regarded contrary to practiced politics, and for the ethnic minorities there was just the option of assimilation (Stola, 2005).

Inner political conflicts arose as of the late 1960ies between the political generations: on the one hand a calling for liberation under the influence of the “Prague spring”, on the other hand antise-mitic campaigns which caused Gomułka to resign in 1970. Gierek followed, a former coal miner and emigrant to France and Belgium who was even more open to the Western countries, and pursued a policy of *détente* (cf. Heyde, 2017: 115). Hence, in the 1970s, coal miners and industry workers experienced an economic upswing through, e.g., foreign investments. Furthermore, Poles

could travel more freely to Western countries due to the availability of passports for tourist visits enabling them to learn about the perception of Poland from outside (Ibidem; Dziekońska, 2021: 144), to petty trade, i.e., making money through irregular trade (Iglička, 2000), or to undertake short-term illegal seasonal migration for economic purposes, mostly to Western Germany, Austria, or France. As the official exchange rate was kept artificially at a low level, even relatively small savings from foreign currency allowed for a significant increment of life quality in Poland upon return(s) (Stola, 2005; Okólski, 2012a). Furthermore, as many Polish public companies engaged in business with countries from the socialist bloc, including Eastern Germany, Cuba, or Libya, but also some Arab countries like Iraq, Egypt or Jordan, large numbers of Polish construction workers, engineers and specialists were allowed to migrate to these countries on short-term basis (Knopek, 2002). This form of incomplete migration has become again widespread after and beyond the fall of the communist regime in the 1990ies (Okólski, 2012a).

However, inner political risings and an economic crisis due to overwhelming state loan responsibilities and the oil crisis caused another decrease in standard of living and change of political leadership in the early 1980s to General Jaruzelski (Heyde, 2017). The support by the Polish population decreased during the following years of deprivation (Stola, 2005). Respectively, a larger wave of more than 1 mill educated Polish emigrated (Pleskot, 2015; White et al., 2018). 15 percent of the Polish scholars left mainly to the USA (Iglička, 2001) but were not allowed to return which led to their political exile and support of Poland from abroad (Pleskot, 2015). Travels to the West increased, counting to about 1.2 mill trips from which about 120,000 people did not return. These developments were again followed by a new lock up of the borders as of 1981 (Stola, 2005). Due to inner pressure, travel restrictions to the West had been eased again ending up in a free passport politics with every Pole being entitled to get one. By 1988, about 2.8 mill of such travelers were counted with not everyone returning back to Poland (Ibidem). Furthermore, between 1980 to 1989, about 1 mill so called ‘invisible migrants’ existed which emigrated temporarily but turned into long-term absence of more than 12 months (Anacka and Okólski, 2010). The post-war and communist Poland can be characterized as an emigration country (Stola, 2005; Mayblin et al., 2016), with about six mill people having left Poland (Iglička and Ziółek-Skrzypczak, 2010).

In light of political developments, dialogues with the opposition led by Wałęsa of the Solidary Citizens Committee had become inevitable and led once more to changes in the political landscape. In what followed is also known: the fall of the communist regime in the late 1980ies and the insurrection of a non-communist government based on (partial) free election. Its first elected president became Wałęsa who was introduced into duty by London-exile president Kaczorowski. He handed over the insignia of the Second Republic of Poland, marking the end of the exile-government (Heyde, 2017; Stachura and Komorowski, 2004). Political emigration once again came to an end (Burrell, 2013; Isanksi et al., 2013). The elections on the 4th of June 1989 shaped not only new political and social structures in CEE but also new migration trends (Okólski, 2007; Nowicka-Franczak, 2018).

4.1.3 Times of transition towards EU accession of Poland

The 1989 revolutionary act across the countries under Soviet Union Power symbolized an evolutionary change, including Poland (Heyde, 2017). The past was to be sealed and the new beginning was marked by building trustful foreign political relationships and by reorganization of the economic system. Economic mismanagement had caused the domestic market to break down, making it difficult to establish a free market economy. Due to deep reforms, the economy experienced a stable rising over the coming years while from a political point of view, the country underwent constant changes of re-orientation after each election leading to a perpetuated rivalry between the leading political parties and coalitions, causing again dissatisfaction and political apathy among the population (Ibidem; Grosfeld and Zhuravskaya, 2013). Moreover, several changes to the political landscape led to rather controversial foreign politics making Poland a rather “awkward partner” (cf. Szczerbiak and Bil, 2013: 40). From a foreign policy perspective, Poland followed Western oriented politics, culminating for instance in the EU accession in 2004 (Heyde, 2017).

Unsurprisingly, the initial years after 1989 represented a decisive turning point in how Polish generations perceived life: there was the elderly population that valued past traditions, and there was the young population that longed for new alternatives in lifestyle, self-realization, and commerce (Dzięglewski, 2016). Though there was desired freedom brought to the Polish more of a sudden, the change caused especially the working age population to deal with their lives now on individual

basis which was challenging in times of steeply increasing unemployment and pessimism about an unknown future (White, 2011; Akhurst, et al., 2014; Luthra et al., 2016; Kaczmarczyk, 2010). Despite or because of these developments, mobility took up heavily: A total of 19 mill cross border movements were counted according to Polish government data, though not all of them migration (Iglicka, 2000; Stola, 2005; Burrell, 2013; Kaczmarczyk, 2013). Moreover, doors opened to Poles and their descendants to return to Poland, with a first larger wave of ca. 100,000 from overseas and Western Europa (Fihel and Górny: 2013), including a large share of permanent return with some of them having re-emigrated already before (Anacka and Fihel, 2012).

Returning to Poland during the years of transition was - among other reasons such as the legal possibility to return, family reunions or retirement - driven by the fact that new and specific work opportunities occurred from the transition (Fihel and Górny, 2013; Financial Times, 2019; Kionka and Żak, 2020; Okólski, 2007). Relatedly, return migration from e. g., Germany was observable for middle aged Poles who originated from rural Poland and had vocational educational level, suggesting strong selectivity among returnees is indeed exercised (Anacka and Fihel, 2012). They returned to wage-employment in higher positions to mostly the private sector, i.e., they were economically active upon return. Factors like dual citizenship (e.g., Polish - German), unused human capital on an unfavorable Polish labor market as well as looser home network ties or in cases more simple jobs, however, motivated for subsequent re-emigration (Ibidem; Fihel and Górny, 2013), not necessarily to the same destination country (Zaiceva and Zimmermann, 2016). Specifically, between 1989 and 2002 about 87,000 Poles returned out of which about 28 percent re-emigrated again, mainly because of societal reintegration and re-adaption challenges, especially for the accompanying family as they returned to a 'different Poland' (Chlebek, 2011; Karolak, 2020).

Since the right to return was now given and real again, a temporary leave has developed to soon become the dominant strategy in economic emigration behavior while permanent migration declined, especially due to continued stricter immigration policies in the Western countries plus costs of migration had lowered significantly through cheap travel or cheap communication etc. making migration more profitable (Kaczmarczyk, 2013, 3; Iglicka, 2000; Okólski, 2007). Many of the temporary migrants were, initially, the poorly skilled with low social status and limited job opportunities looking for "gainful employment" abroad under sometimes harsh working conditions to

“earn abroad and spend at home” (cf. Kaczmarczyk, 2013: 3). As such, they lived their migration lives as “Spartans” with their work “embodied in forms of ‘organic work’” (cf. Starnawska, 2012: 6). They left families behind but stayed in close contact with them while abroad (Kaczmarczyk, 2013; Dziekońska, 2021). Continuously circulating back and forth to Western Europe along with a restrictive spending attitude abroad provided for a fast way of improving living standards at home and a survival during the hardest period of economic transformation when most of the publicly owned industries had either been closed or restructured (Okólski, 2012b). This process was possible due to still unfinished modernization processes and life predominately occurring in rural areas or small cities (Ibidem). Migration became connected to terms like temporariness, economic survival, small profits, and household contribution through migration savings. However, in many cases, migration in did not mean an escape from societal margin, at the end (Iglicka, 2000). By 2002, Poland’s population amounted to about 38 mill. people with about 97 percent of Polish nationality, about 2 percent of unspecified nationality and the remaining share of other nationalities (immigrants): e.g., German, Belarus, Ukrainian, Russian, Lithuanian, or Slovak; some Poles declare their nationality as belonging to ethnic groups of Lemko, Kashubian or Silesian (Leśniewska and Mazur, 2008). Poland was homogeneous also from a linguistic point of view as about 97 percent of the population spoke Polish and all (state) administration was to be performed in Polish, the sixth biggest mother tongue in the EU (Leśniewska and Mazur, 2008).

4.1.4 Migration developments in Poland since her EU accession in 2004

A. Emigration

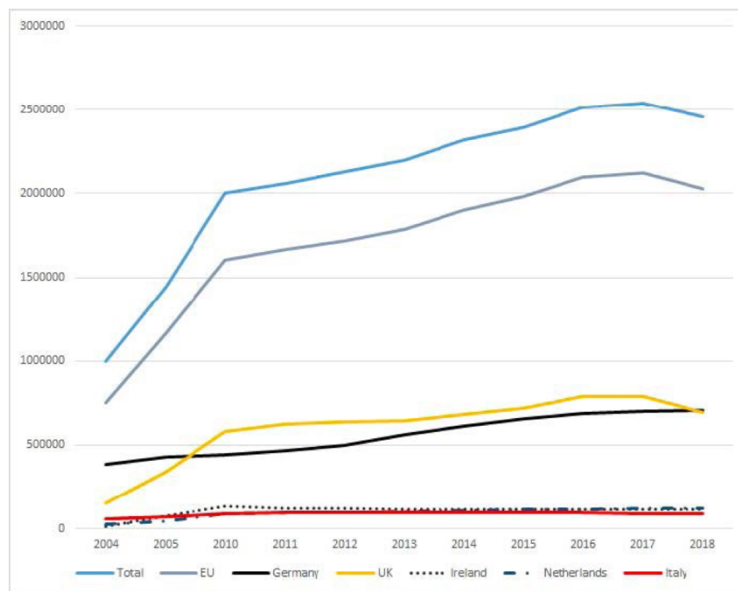
With regards to the SD data set for the empirical analysis, migration outflows developed as follows and alongside expectations with regards to returnee structure (Dustmann et al., 2012; Glorius, 2023). In 1998, almost one third of all Polish emigrants lived in the USA, just under 30 percent in Germany, and only 5 percent in the UK. The newer flows of emigrants, however, were mostly directed toward Germany (36 percent), to a lesser extent the USA (15 percent), 6 percent of new emigrants went to the UK and no emigration to Ireland. By 2007, in contrast, the situation was reversed: one third of Polish emigrants were now living in the UK, 18 percent in Germany, 12 percent in Ireland and only 6 percent in the USA. This shift reflects a sharp change in the

destination choice: in 2007, 37 percent of new Polish emigrants chose the UK, 12 percent chose Ireland, 16 percent chose Germany and 3 percent moved to the USA. In that same year, 88 percent of the entire population of new Polish emigrants moved to EU countries which accounted for 84 percent of all Polish emigrants, up from 55 percent in 1998 (cf. Dustmann et al., 2012: 13). The anticipated and materialized EU accession of Poland in 2004 greatly accelerated the desire for migration (White et al., 2018; Miłaszewicz et al., 2015; Anacka and Okólski, 2010). Relatedly, Polish emigration from 1998 to 2007 with an emigrant share increase from 0.5 percent to 2.7 percent contributed to an overall home wage growth for intermediate skilled population (Dustmann et al., 2012). A decrease in emigration numbers sparked as around of 2016 because of gradually materializing of the modernization processes and because of an “exhaustion of the emigration potential of Poles and economic convergence within the [EU] community” (Matusz and Aivaliotou, 2020). By 2016, about 2.5 mill Poles lived outside Poland and have, in fact, migrated (Armstrong, 2017). The below figure 3 provides an overview of Polish emigration as of 2004 to 2017 both in numbers and EU geographies (Brzozowski et al., 2020; see also appendix XI).

Figure 3: Overview of Polish emigrants from 2004 to 2017 (return migration potential)

Estimated stock of migrants from Poland residing temporarily abroad

Source: Statistics Poland (2019). Please note: migrants temporarily residing abroad are individuals staying abroad for more than 3 months (2 months for 2004-2005) at the end of a given year.



Source: Brzozowski et al. (2020), p. 12.

Due to the opening of EU foreign labor markets in 2004 - initially by Denmark, Ireland, UK, and Sweden, and later by other EU Member States - large scale emigration served Poland as a political safety valve that diminished the demographic pressure on the Polish labor market (Kaczmarczyk et al., 2020a; Dzięglewski, 2015) and that continued to make room for necessary transformation, needed to increase economic indexes, to foster economic development and modernization (Anacka and Okólski, 2010; Kindler, 2018). Emigration first peaked in 2006 and 2007 when more than 1.3 mill Poles left (Brzozowski, 2011), particularly to the UK which developed over time to the most popular destination country of Poles (Grabowska et al., 2023). These migration developments were viewed negatively in Poland (“migration hysteria”) (cf. Brzozowski, 2011: 2) as the attracted Poles were said to have been literally “crowded out” of the regional labor markets (Lesińska, 2013). Moreover, as self-employed individuals were exempt from labor market restriction rooted in transnational agreements, discussions arose whether self-employment becomes a means to evade restriction but also whether self-employment rates would rise abroad (Ulceluse and Kahanec, 2022).

An Unemployment rate of about 20 percent was a strong push factor into emigration among first-generation Polish males in working age, usually educated and unattached, with some level of English, not all much work experienced and either from rural or urban regions (Akhurst, et al., 2014; Dustman et al., 2012; Kindler, 2018; Drinkwater and Garapich, 2015; Anacka and Okólski, 2010; Chlebek, 2011; Grabowska et al., 2023). The predominance of male emigrants reflected “the migration-for-work nature of migration” (cf. Kępińska, 2007: 12; similar Rokita-Poskart, 2014). Among these economic migrants, the young and relatively well-educated Poles were over-represented because post-communism had caused many of them to enroll in further education but they still faced unemployment after finishing (White, 2011; Bukowski and Novokmet, 2021; Grabowska et al., 2023). This was true especially for specific groups of high tertiary educated younger Poles such as doctors, nurses, R&D scientists etc. (Kaczmarczyk and Okólski, 2008; Brzozowski and Coniglio, 2021). This crowding out of brain overflow additionally allocate efficiently labor surplus on the Polish labor market (Brzozowski, 2011). However, as they generally left just with no or little professional experience, they faced overqualification problems abroad when taking on jobs below their qualification (Brzozowski and Coniglio, 2016). Furthermore, during migration, they may not all have acquired additional skills needed for reintegration into a changed home labor market upon return, leading in many cases to not to return permanently but to migrate back and

forth between the migration countries, a form of migration known as incomplete migration (Okólski, 2012a). The individuals got stuck in the “migration trap”, yet it provided for economic stability (Brzozowski and Coniglio, 2016). With increased economic growth after 2004 and decreasing unemployment rates for coming years, Polish elites have recognized that such emigration was loss of valuable human capital and initiated several campaigns and policies aiming at their return migration, though rather unsuccessfully (Iglicka and Ziołek-Skrzypczak, 2010). Those with accompanying family did not return in large scale but settled abroad turning temporary migration intentions into permanent migration (Bahna, 2016; White et al., 2018), therefore completing their “social capital abroad”, (cf. Kępińska, 2007: 12). Moreover, there are drifters in the case of UK with the wish to simply enjoy life abroad (Chlebek, 2011: 20).

Liberal immigration policies, demographic challenges, favorable labor market entries along with high wage differentials were strong pull factors by Western countries, especially in case of the UK (Barrell et al., 2007; Chlebek, 2011; Rutkowska-Ziarko et al., 2017; Bahna, 2016). Not imposing immigration restrictions was due to the country’s expectation of positive economic impact from immigration (Bahna, 2016; Rutkowska-Ziarko et al., 2017). Immigrants took mostly more simple jobs in the UK secondary economy while in Ireland also jobs that required higher education (Bahna, 2016). Taking on jobs that natives would not take was “the single most important factor why Polish migrants [were] so competitive on the British labour market” (cf. Chlebek, 2011: 32). This resulted for many Poles to work excessively long hours for fixed income in construction, agriculture, service, or hospitality to meet overall migration earnings expectation (Drinkwater et al., 2009, 173; Akhurst, 2014; Engbersen et al., 2010). Following their goals consequently, Poles appeared to have the highest UK employment rates among immigrant groups from other EU countries (Drinkwater et al., 2009) but also compared to UK locals (Rutkowska-Ziarko et al., 2017).

Besides wage-employment, many Poles made use of the opportunity to set up their own businesses as an eased entry strategy to the labor market (Drinkwater et al., 2009; Engbersen et al., 2010; Rokita-Poskart, 2014). Specifically, this led to an increase in the establishment of SME from 4,400 in 2004 to 14,300 in 2005 (Okólski, 2007). Most of these immigrant businesses were run by the owner only, but some also with hired employees (Mestres, 2010). Respectively, the large-scale inflow of Poles to the UK allowed for beneficial local “economies of scale in the formation of

organizations that facilitate social interaction and informal employment” (cf. Bahna, 2016: 386). Since, moreover, more immigrants started a firm there compared to UK natives (Kerr and Kerr, 2020), an entrepreneurial spirit of migrants is confirmed but these developments also reflect the (favorable) economic structure of the UK economy in this respect (Mestres, 2010). Despite and against negative perception of immigration, Barrell et al. (2007) show that EU-8 immigrants, including Poles, to the UK and Ireland did not relieve unemployment rates by large on these host country labor markets suggesting that (at least for these cases) immigrant activities can indeed be more of a complement rather than a substitute to natives or other immigrant groups. The return on human capital investment, however, was in the Polish case lower compared to other EU migrants or non-migrants (Drinkwater et al., 2009; Kaczmarczyk, 2010; Filimanou and Mika, 2019).

One reason of Poland to be part of the EU was to speed up the process of economic convergence (Kaczmarczyk, 2018). When looking at the migration differential and thus at the earnings situation, the Polish average salary was far below UK earnings (EU Commission, 2018). Bahna (2016) has looked at emigration waves of EU-8 migrants to the UK between 2004 to 2014 revealing considerable initial diversity of earning levels: while the average annual net UK earning was 7.37 higher than in Poland, the same UK net earning accounted for 11.74 of the annual earning in Latvia or for Slovakia of 7.41. By 2014, the average annual net UK earning was 4.43 higher than in Poland, the same UK net earning accounted for 4.91 of the annual earning in Latvia. These developments were due to economically home country catch up of wages, falling exchange rates until 2009 and then stabilized exchange rates, though not in every case as for instance Hungary (Ibidem). As such, wage differentials strongly explain in neoclassical sense Polish migration pattern as of 2004 (Bahna, 2016; Burrell, 2013; Kurekova, 2011; Ciżkowicz et al., 2007; Akhurst et al., 2014; Bijak, 2006; Drinkwater and Garapich, 2015). These circumstances further confirm migration to be a survival strategy, revealing that a host country job’s compatibility with a migrant’s home higher education was not a prerequisite for selection into migration (Ciżkowicz et al., 2007; Drinkwater et al., 2009; Drinkwater and Garapich, 2015; Hołda et al., 2011; Filimanou and Mika, 2019).

However, wage differentials may not explain why for instance Poles significantly more than other CEE nationals left for and stayed in the UK (Bahna, 2016). Despite fact that there was no common border, no sizable diaspora in the country and English was not predominately spoken in Poland,

Poles dominated this migration route (Ibidem). Previous (successful) emigration and the exile relations between Poland and the UK may have contributed to large-scale emigration to the UK as basic network channels already existed to rely and to extend on (Drinkwater et al., 2009; Rutkowska-Ziarko et al., 2017). With Poles staying much longer (about 4 years, Rutkowska-Ziarko et al., 2017) as e.g., Slovaks, the ground for sustained social networks has developed more effectively for Poles causing more and chained migration for Poles than for Slovaks, whether during economic crisis or not (Bahna, 2016). Therefore, the size and quality of social networks at the host country played an important factor of Polish emigration, although White (2016) states that inefficient migration networks were return factors for Poles when originating from and returning to poorer rural areas, i.e., to Grajewo or Limanowa (White, 2016). However, while many that left as of 2004 originated from Eastern and Southern Poland, their returns are not matching these geographies due to selectivity: some regions attracted returnees through high degrees of urbanization, industrialization, and academic centers such as around Poznań while other regions pushed returnees away due to high unemployment as e.g. regions around Gdańsk (Anacka and Fihel, 2012: 17).

To complete the picture on emigration, about 90 Polish communities exist outside Poland that differ in origin and situation, the largest in the USA, Germany, Brazil, France and smaller ones in Belarus, Canada, Argentina, or the Netherlands (Leśniewska and Mazur, 2008; van Heuckelom, 2019). Two main groups have formed (Leśniewska and Mazur, 2008):

- Indigenous Polish ethnic communities, or communities resulting from repatriation: e.g., in Latvia, Lithuania, Belarus, Ukraine, Russia, Kazakhstan, Czech Republic, Slovakia, Hungary, and Romania
- Polish people in diaspora, resulting from waves of emigration from Poland, both in Europe and overseas (Polonia) which has great return potential.

With regards to this return migration potential, millions of emigrants have left Poland since the 19th century, carrying, and preserving the Polish language and culture to different extent, however, linguistically they are exposed to standard Polish but also Polonia Polish colored with local variety (Ibidem). Many emigrants maintain a strong desire to keep their national identity intact, oftentimes “kept safe for when or if it was taken back home again” (cf. White and Ryan, 2008: 1497). Depending on how much the individual is exposed to these circumstances will impact the chances

and quality of a return to Poland. Since Poles are still leaving and not all returning puts the Polish economy continuously under demographic pressure in need for replacements (Kusek, 2019). Looking at an ageing population and low birth rates, Poland attempts to attract her diaspora back to Poland (Brzozowski et al., 2020: 29) by using “the central European nation’s booming economy to lure more emigrees home to help combat shortages in the Polish labor market” (cf. Financial Times, 2019: 1). In practical terms, obtaining the so-called Polish card has become easier for them which grants free access to the Polish labor market before potentially obtaining Polish citizenship at some point in time upon more permanent settlement (Brzozowski et al., 2020).

B. Return migration

Due to uncertainties about social realities and futures, the majority of post-accession migrants did not have definite plans about migration duration and therefore return migration (Glorius, 2023). As the related reference point is explicitly made on welfare system and financial return, it made Polish migration rather open-ended, liquid, unpredictable or undetermined until these expectations are fulfilled (Drinkwater and Garaich, 2015; Engbersen et al., 2010; White et al., 2018). Estimates, however, provide for a return migration potential of to 50 percent among post-accession migrants (Glorius, 2023; Fihel and Górny: 2013; Brzozowski and Coniglio, 2016). The 2008 global financial crisis caused a wave of return migrants to Poland (Fihel and Górny: 2013) when 600,000 Polish returned mostly from the UK (Burrell: 2013; Lesińska, 2013; Anacka and Fihel, 2012). In 2009, another wave of returnees mostly aged around 30 years old was observable, supposedly because of a continued worsening economic situation abroad compared to economic growth in Poland, because of natural comebacks after one or two years staying abroad (Chlebek, 2011; Hołda et al., 2011; Grabowska and Jastrzębowska, 2023), because of negative professional development opportunities (Cieślik, 2011), because of capital accumulation fulfillment or personal reasons (Chlebek, 2011). They came back with relatively long traditions of emigration but not necessarily due to strong pull factors (Kindler, 2018; Filimanou and Mika, 2019; Chlebek, 2011). There are some prominent examples of Radosław Sikorski or Jacek Rostowski, minister of foreign affairs and minister of finances under Civic Platform government, who returned from UK permanently. Overall, by 2010, an average of 10 percent of the Polish labor force had foreign work experience

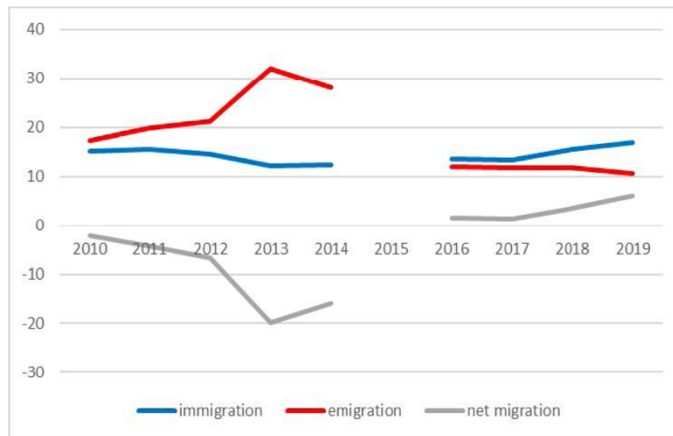
and 20 percent of the 18 to 24 year old Poles while 11 percent of the 25 to 34 year old Poles still expressed interest for employment abroad (Isański et al., 2013).

Exact returnee numbers are, however, not available before 2011 due to statistical unclear definition of returnees or methodological problems with surveys (Anacka and Fihel, 2012). However, not every Pole that left the host destination returned to Poland but moved on, as in cases of Poles in the UK that moved rather permanently on to Norway undertaking transmigration that is migration from one country of destination to another (Anacka and Fihel, 2012; Erdal, 2015). By 2018, Poland dropped from the first place in the UK immigrant migrant statistics after roughly 100,000 Poles left due to or were negatively influenced by Brexit, e. g. in anticipation of their legal status to further stay in the UK (Migration Observatory, 2021; Jancewicz et al., 2020). Grabowska et al. (2023) find that Brexit supported a normalization of the East-West migration route as Germany then took the first place of destination choice among Poles, particularly for the young adults. While integration into the UK felt easier, integration into Germany remained challenging, though many Poles from rural areas went only seasonally to Germany and as such short-term back and forth (Fihel and Anacka, 2012: 29). For them, migration behavior has changed to mobility behavior (cf. Anacka and Fihel, 2012: 30). By end of 2019 about 2.5 mill with permanent residence in Poland had been living abroad before for over three months (White et al., 2018: 19; Szałańska, et al., 2023: 257; Grabowska and Jastrzębowska, 2023: 15). In light of the 2000 Covid-19 pandemic, 54,000 Polish workers in the UK lost their jobs in the secondary market sectors (Paul, 2020).

The below figure 4 provides for estimated immigration flows to Poland between 2010 to 2019 which include returnees as they are statistically captured as immigrants. However, for many migrant Poles, the current Polish labor market and Polish institutions are still viewed inferior to those in the UK or Germany, lowering prospects on return migration to Poland (Żołędowski, 2020: 5; see appendix XI, XII).

Figure 4: Overview of Polish migration from 2010 to 2019

Immigration and emigration flows to Poland (in thousands)
Source: Statistics Poland (2020).



Source: Brzozowski et al., (2020), p. 22.

While language knowledge and soft skills were perceived positively upon return, (practical) migration experience has not as much materialized (Karolak, 2020). For many, their return migration resulted in career fragmentation with a return to also precarious jobs on the segmented labor market in Poland (Filimanou and Mika, 2019). Especially for the young, highly educated former emigres that returned from the societal margin abroad faced upon return jobs not matching their pre-migration higher qualification either. They again got pushed to the societal margin, now at the home country labor market. Migration did not make them ready for the advanced home country labor market (Dzięglewski, 2015, Brzozowski and Coniglio, 2016). Their return(s) were not successful since ongoing deskilling processes cause gradual depreciation of the formerly higher education (Brzozowski and Coniglio, 2016). Furthermore, for many Poles that have lived in the UK, after so many years, “moving back to Poland [was] not a return, but another migration”, especially under changing political set ups in Poland (Financial Times, 2019). Consequently, return expectations and realities differed (Karolak, 2020). Remaining wage differentials, job vacancies abroad, a perception of “getting less for more money”, competition on the home country market on labor or housing, migration experience, improved foreign language, established transnational networks, cheaper travel and therefore less migration cost were major factors for re-emigration considerations in unfulfilled return scenarios (Zaiceva and Zimmermann, 2016; see also appendix XII). Those who reached upward engagement upon return, their former “crowding out” turns into positive potential for economic growth of the Polish economy (Brzozowski and Coniglio, 2016).

C. Immigration into Poland

To understand the home country environment for Polish returnees, it is important to also consider immigrant groups in Poland as their notion is becoming increasingly relevant in describing existent social environment in Poland (Andrejuk, 2019). Though Poland is situated in the heart of Europe, it has for long been associated a “backward and poor country” with its culture as well as achievements little known outside (Leśniewska and Mazur, 2008). While as of the 1990ies immigration was more of a novelty, Poland did not need immigrants to fill local labor gaps, however, until the large emigrations as of 2004 (Brzozowski et al., 2020). Politics had therefore not undertaken distinct initiatives to attract immigrants (Iglicka and Ziołek-Skrzypczak, 2010). It took until 2003 that different acts and laws in light of the anticipated EU and Schengen zone accession in 2004 and 2007 pathed the way for immigration politics which have since developed to a stabilized and extended phenomenon (Kowalik et al., 2022) with influx being controlled and immigration policy being developed (Grzymała-Kazłowska and Okólski, 2003). This also applies to regularizing entrepreneurial activities by immigrants (Klich, 2017). Between 2009 to 2011, the self-employment rates of immigrants were above those compared to natives (OECD, 2013). By 2014, there were about 120,000 third-country nationals and 60,000 EU citizens registered in Poland (Brzozowski et al., 2020). In 2016, for the first time, the number of immigrants outnumbered the number of emigrants (Domalewska and Żakowska, 2016; Żołądowski, 2020), especially with respect to permanent settlers (Andrejuk, 2019). This stage of migration transition is to a large extent rooted in the modernization process that sparked as of the early 1990ies (Okólski, 2021). Specifically, there has been net long-term emigration and net short(er)-term immigration observable, making Poland no immigration country yet which is why there is still no systematic policy making present (Okólski and Wach, 2020). Moreover, Poland is particularly distinct in its short-term immigration rate compared to other European and non-European countries (Żołądowski, 2020; Okólski, 2021). Contemporary Poland therefore holds a semi-peripheral position within Europe concerning international migration flows (Żołądowski, 2020). Despite, many from outside (still) perceive Poland as a transit country to the West (Brzozowska and Glinka, 2019), and a country that shows “discursive politics” in more recent approaches towards immigration and integration (Iglicka and Ziołek-Skrzypczak, 2010; Andrejuk, 2019; Cap, 2018; Kowalik et al., 2022). In 2017, about 76,000 foreigners arrived in Poland (Okólski and Wach, 2020), though increasing immigration is not correlated with

unemployment rates or inactivity rates of natives (Duszczyk and Matuszczyk, 2018). Immigration numbers developed into more than 600,000 first residence permits issued to non-EU citizens before COVID-19 pandemic (Brzozowski et al., 2020). By now, there are about 2.2 mill immigrants living in Poland that mitigate demographic challenges which is about 5.5 percent of the total population, mostly without family and on short term basis for less than 12 months (Okólski, 2021; Szałańska et al., 2023). Policies and programs to target immigrant entrepreneurs have been taken up, such as the “Poland Prize”, a support service for foreign startups (OECD, 2021).

However, low in percentage and few in places of origin, “Poland is not characterized by super-diversity” in this respect (Józwiak et al., 2014; similar Kowalik et al., 2022). Promoting sustainable immigration would be a way to balance labor shortages, also because the outflow rates are expected to remain stable at some level as emigration by the unpredictable or for educational purpose prevails, despite a rising migration hump (Brzozowski et al., 2020).

Initially, immigrant business owners operated in petty trade at fares but since 2000, with the emergence of large shopping malls, this type of entrepreneurial activity has vanished, requiring a restructuring of the business models towards more profitable business in sectors such as hospitality or gastronomy (Zubair and Brzozowski, 2018: 61). As only a few ethnic economies exist in Poland, business development into the mainstream market has remained limited due to higher entry cost (Ibidem). From further away countries, immigrants are generally male, in working age and settle in bigger cities with prosperous developmental forecast and lower unemployment rates (Brzozowski and Pędziwiatr, 2015). The higher skilled immigrants come from developed countries (Brzozowski and Pędziwiatr, 2015). The low(er) skilled immigrants generally take up jobs at the lower end of the Polish mainstream labor market creating a partial heterogeneous structure there, aiming to adopt their business and products to Polish (and not co-ethnic) demand expectation (Brzozowski and Pędziwiatr, 2015). However, as small ethnic community means less competition among ethnic businesses remains, in fact, a motive for setting up SME deliberately in such environment (Zaei, 2021). The related established businesses are of small restaurants and spas (Asians) or trading services (Armenians) etc. (Kępińska, 2007; Brzozowski and Pędziwiatr, 2015). By 2017, the rate of self-employed persons among native born persons amounted to 17.4% while the share for migrants born in another EU country, for instance, amounted to 28.6% which reflects a higher propensity into self-employment among these immigrants (Eurtostat, 2018).

For migrants from the former Soviet Union and Armenia, co-ethnic communities have existed for centuries in Poland which is why members of the group come to and partially stay in Poland (Iglicka and Ziółek-Skrzypczak, 2010). Due to the gap created by emigration and because of the cultural background being similar to Poland, inflows of economic migrants especially from the Ukraine (large-scale), Belarus and Russia have taken place for long (Brzozowska and Glinka, 2019), mostly of short-term, circular, and seasonal form of migration (Józwiak et al., 2014). The immigrants are generally young, with female dominating from the former Soviet Union States (Brzozowski and Pędziwiatr, 2015).

The continued settlement of immigrants from Vietnam dates back to the 1950s when Poland and Vietnam established political and economic ties and set up formal student and worker exchanges (Bodziany et al., 2015; Iglicka and Ziółek-Skrzypczak, 2010). They have over time established a long entrepreneurial history in Poland (Brzozowska and Glinka, 2019). Despite large cultural dissimilarities and lack of institutional support for integration, the ethnic enclave strategy remains in place helping them to be well integrated in economic terms (Grzymała-Kazłowska and Okólski, 2003). Labor Migration from China into Poland occurred because of market potential in the telecommunication and construction sectors, and because of Poland's EU funds for modernization and investment attracted Chinese businesses (Iglicka and Ziółek-Skrzypczak, 2010). There are also Koreans and people from India visible operating SME in Poland (Brzozowska, 2018; Zaei, 2021). Also, there is distinct and increasing migration from Southern countries to CEE that deviate from the traditional south-north migration route, e.g., Turkish immigrants of around 4,000 occurred by 2018, among them entrepreneurs who rely on the ethnic community but also apply the transnational or internationalization strategy (Andrejuk, 2019). With the Polish economy growing over the past years, Poland has also become a place to immigrants from the Middle and Far East (Brzozowski and Pędziwiatr, 2015). Additionally, the “gig economy”, that are platform workers who provide on-demand service through apps, like in transportation or delivery business etc., increasingly employs immigrants, however under precarious conditions (Kowalik et al., 2022).

The below tables summarize the above-described historical milestones in Polish history from migration perspective.

Table 6: Summary of historical milestones in Polish history from migration perspective

Period		Guiding theme for period	Developments	
1772 - 1918	Partitions of Poland	Rivalry of Austria, Prussia, Russia over Polish land	Poland was extinct as a state for more than 120 years Private businesses existed	The three powers established their institutions, values etc. on the former Polish land; initial economic migration
1914 - 1918	WW I	Reshaping of border, border issue unresolved	Massive destruction on Polish land	Political and economic migration
1918 - 1939	Interwar period	Republic of Poland, until 1939	From democratic parliament republic towards authoritarian presidential republic	Predominantly agriculture economy, business sector existent, some growth
1939 - 1945	WWII	Occupation	Business sector vanished Massive killings/ deportation	Poland becomes homogeneous population
1945 - 1947	Postwar reconstruction	Polish Republic, setting of borders	Adjustment migration. Nationalizing of business sector, though cooperatives and smallest business established	Return migration, political and ethnicity motivated displacements
1947 - 1989	Communism	Centrally planned economy	Industrialization and economic growth until 1970ies	Country with no exit, controlled migration
1947 - 1973	Cold war	Blooming Western markets vs. controlled and non-efficient Eastern economies	Suppressed labor mobility in the East	Bilateral immigration related agreements to allow controlled influx and outflux
1973 - 1988	Political détente	Globalization challenge, economic reconstruction, integration, failure of the socialist modernization	Search for low-cost labor from abroad Private business ownership strictly regulated	Passport politics, limited outflow of Poles, hardly any immigration
1989	Post Communism	Market-based economy with parliamentary democracy	Re-industrialization	Open borders allowed for return migration New mobility
1989 - 2004	Transition economy, modernization	Increase of migration, incl. return migration	From permanent to temporary/ incomplete character of migration	EU Intra-regional movements arise Temporariness in migration
As of 2004	EU embedment, crowding out	Further segmentation of labor markets, war for high skilled talent	Rising local demand to close gaps caused by emigrants	Emigration into dual labor markets abroad (UK) Immigration policies
2004 - 2014	Schengen zone accession Strong economic development	Economic impact from return migration, occupational choice upon return becomes a more intensified debated topic	More than 580,000 returnees to Poland between 2004 to 2008, some re-emigration Seasonal, circular, fluid migration pattern develops, temporariness, transnational ties establishing	A typical returnee profile is that of a middle-aged, from rural Poland, with a lower level of education. In contrast, younger persons originating in cities with a higher education level are more prone to settle down abroad.
As of 2016 / 2017	Developed economy	Transition from emigration towards immigration country, semi peripheral position	Attempts to attract returnees back, esp. Polish diaspora	Outflow of Poles remains (unpredictable, drifters, education purpose etc.); immigrant niche businesses in bigger cities increasingly visible

Source: own elaboration, based on Bukowski and Novokmet (2021), p. 190, Okólski (2007), p. 1, 2; Anacka and Fihel, (2012), p. 28.

4.2 Development of the business environment in Poland

Successful entrepreneurship has over time contributed sustainably to Polish life which is why a positive attitude towards entrepreneurship has evoked that is still present in Poland's contemporary society (GEM report 2013, 2019/2020; Tanas, 2007; Stoica, 2012). The following chapter outlines related milestones in light of return migration and occupational choice upon return.

4.2.1 Development of the Polish SME sector from the 1920ies onwards

Due to economic growth in the 1920ies, the Polish entrepreneurial class (ca. 12 percent of the population or 3 mill in numbers) developed relatively large and thus became increasingly important to society. More than half lived in the countryside as owners of small shops, small trade enterprises, and handicraft workshops (Tanas, 2007). The lower middle class (ca. 43 percent of the population) composed of teachers, clerks, pharmacists but also entrepreneurs (50 percent of lower-class) who lived in towns owning "the means of production" (cf. Tanas, 2007: 72). They worked mainly for themselves, hiring others when necessary (Ibidem). Fritsch et al. (2019 and 2021) found a positive relationship between high regional levels of knowledge-intensive entrepreneurship in the 1920ies to current start-up activity in Poland, especially in areas where large parts of the local population were forcibly displaced due to WWII.

After WWII, the politico-economic system of a centrally planned economy was established with many private companies involuntarily nationalized and taken from original owners (Fritsch et al., 2019). This resulted in "the expropriation of entrepreneurs in most sectors of the economy and the [controlled] development of private initiative and entrepreneurial activity" (cf. Brzozowski et al., 2021: 3). It caused underdevelopment of business infrastructure and limited the emergence of private firms that then developed much smaller and less profitable compared to counterparts in the Western world (Brzozowski et al., 2021). Centralized decision-making structures along with prohibitions of entrepreneurship limited the overall level of entrepreneurial alertness (Ireland et al., 2008; Sautet, 2013) with negative consequences for creating added-value, innovation, or jobs (Ireland et al., 2008). Entrepreneurial propensity could not unfold (Chelariu et al., 2008). The entrepreneur was displaced from being an influential determinant of economic growth (Sautet, 2013).

Whether or not entrepreneurs are allowed to play an active role in an economy depends on how economies are organized (Ireland et al., 2008). The difference in contrasting settings of socialism and capitalism lays in the perception of justice with regards to distribution of services and products to society. Socialism creates social equality in outcomes while capitalism holds the view of entitlement to distribution or to equality of opportunity, as long as the means of acquisition are legitimate (Ibidem). Communism, building on socialism, is a political and economic doctrine that aims to replace private and profit-based economy with and communal central control of the major means of production (e.g., mines, mills, factories) and of the natural resources of a society (Britannica, 2023). Capitalist entrepreneurs, on the contrary, are entitled to access the value created by their knowledge and action, and thus pursue entrepreneurship. Respectively, firm behavior and entrepreneurship are guided “without the watchful eye of the state imposing its will – and values” (cf. Ireland et al., 2008: 114). Property rights and appropriate wage structures ensure workers and entrepreneurs to receive their just portion of value, thus rewarding the effective input deployment of accumulated knowledge, resources, and appropriate actions (Ibidem). The capitalist market system allows for competition by exploiting unique stocks of knowledge and resources which facilitates alertness, opportunity discovery and risk-taking behavior (Ibidem). For economies in transition, capitalist entrepreneurship is particularly important as the businesses sustain economic growth rates, satisfy occupational needs by creating new jobs, and by absorbing excess workforce that are released from socialist state-owned firm (Chelariu et al., 2008). The businesses arise in spite of formal political and economic institutional limitations which gradually decrease as the economy advances towards market-free economy, economic development and modernization completion (Ibidem).

To initiate economic growth, especially in times of economic crisis, the Polish government pathed way for economic development and practicing of entrepreneurial activities from the 1970ies onwards: local trade through co-operatives, acquisition of foreign technology and knowledge, arrangements of international trade licenses, the possibility to establish a foreign company, allowing foreign capital entries, lifting banking access restrictions or redistribution of labor from state-owned to privately owned enterprises (Tanas, 2007). From an ownership perspective, the Polish economy was divided into three sectors: state-owned large enterprises, cooperatives, and private SMEs, however, unequally distributed in their shares concerning economic potential unfolding of

their assets, turnover and employment since the state sector dominated over the other two (Hyz and Gikas, 2012). In 1988, the general rule on economic freedom (Law on Economic Activity) was adapted providing greater economic freedom to both state-owned and private-owned enterprises as the centrally planned economy no longer worked (Tanas, 2007; Hyz and Gikas, 2012). These development resulted in about 960,000 registered sole proprietors and 650,000 self-employed in the non-agriculture sector (Tanas, 2007; Starnawska, 2009; Smallbone and Welter, 2001), a relatively substantial sector (Dallago, 2003). The Polish private sector had no “prestigious position” but a “strong head start” in 1989 (cf. Tanas, 2007: 80; similar Boruc, 2018). However, none of these businesses much less the state had experience in running private property to form a capitalist environment (Ahmadov, 2020). Due to communist heritage, risk taking was, additionally, not a highly developed personal trait which affected the overall propensity to become self-employed more negatively (Brzozowski, 2017).

In the transition phase that lasted from the early 1990ies to about 2010 (Fischer and Sahay, 2000), necessary modernization processes were activated through a macroeconomic shock therapy in order to commence and to establish a free-market-economy: new institutional frameworks focused explicitly on encouragement of private economic activities through the introduction of commercial and contractual freedom, legal ownership guarantees or lifting of administrative restrictions which, in fact, resulted in the set-up of “thousands of small, privately owned firms” that contributed to social cohesion, resilience, and an even more entrepreneurial-minded society (Hyz, 2006; Tanas, 2007; Bursiak, 2016; Zapalska et al., 2005; Szymura-Tyc, 2015). Rising entrepreneurial activities can be explained by contrasting the entrepreneurial paradigm to the post-Fordist paradigm: While the former emphasizes opportunity realizing to create new enterprises, the latter helps understanding the establishment and rise of SME as a new and more flexible way an economy employs freed labor after restructuring a state socialist, Fordist industry of large state owned companies (Ronatas and Sagi, 2006). Relatedly, privatization and restructuring are prerequisite “for a take-off to modern and sustainable economic growth and to radically increasing efficiency of the labour market” (cf. Okólski, 2007: 22; similar Irastorza and Peña-Legazkue, 2018).

Compared to previous striving for (economic) independence in Polish history, the events of 1989 mark the actual breakthrough into capitalism but at the same time into the quest for how to do so

in distinguished way and not by simply copying Western systems, acknowledging modernization was necessary to martial improvements of quality in life (Nowicka-Franczak, 2018). To reach goals, novelty was its timing along with a consequent following the vision: the government implemented all changes simultaneously, therefore utilizing the unique “window of opportunity in the early democratization of ‘extraordinary politics’” (cf. Åslund, 2013: 3-4), enabling Poland to develop into one of the most successful CEE countries with regards to economic development (Dvoutletý and Orel, 2020). Though this transition had become irreversible, it was, moreover, at the same time unique since it was guided by efficient and effective state intervention that added economic value, thus avoiding a “free economic fall” as in cases of the CIS, e.g., Russia (cf. Tanas, 2007: 87). Moreover, the prospect of EU accession has powerfully encouraged to stick to the modernization path (Fischer and Shay, 2000). Up until the end of the 1990ies, Poland should be regarded a “transition economy”, characterized by equity of foreign capital, an increasing role of transitional financial institutions and frameworks that mark a more market-dependent economy than a liberal one, thus a phase of “incomplete capitalism” (cf. Nowicka-Franczak, 2018: 325).

By 1991, ca. 45,000 private-owned firms were established that created more than 800,000 jobs by 1994 (Tanas, 2007). It was, in fact, the risk-averse worker and not the adventurous (Schumpeterian) entrepreneur who had to make new occupational choices in uncertain times: immature markets, a weak state and large firms concerned with costly restructuring did not absorb the high cost of transition, but SMEs did (Ahmadov, 2020). Entering this kind of self-employment is regarded “a simplified form of entrepreneurship” (cf. Szarucki et al., 2016: 600; similar Blanchflower and Oswald, 1998). Specifically, the role of the entrepreneur developed to being a reformer discovering that goods already well-established in world markets could be produced at home at low cost generating individual and social gains (Stam and van Stel, 2011; Smallbone and Welter, 2001). Those who were first able to spot and make use of profitable opportunities started working for their own account (Marjański and Sułkowski, 2021: 28). Additionally, globalization and information revolution as well as unfulfilled gaps in domestic demand, especially consumer and production-oriented services, transport, or construction, offered these business opportunities (Hyz, 2006; Boruc, 2018; Stam and van Stel, 2011; Tanas, 2007 Rona-Tas and Sagi, 2005). Networks, also from former times, were most supportive (Smallbone and Welter, 2001; Stam and van Stel, 2009; Ahmadov, 2020). SME, therefore, most importantly served as a “cushion against unemployment”

and fostered the required speed of privatization (Ubrežiová et al., 2008). They became the “prime movers in the process of structural change” (cf. Aidis, 2005: 5; similar Stam and van Stel, 2011; Ahmadov, 2020; Rona-Tas and Sagi, 2006; Kozarzewski and Bałtowski, 2019), also because there were hardly capable employees and managers available to work in or manage the new uncertain reality (Ahmadov, 2020). As people were more pushed into (“other”) self-employment, a higher variance of people’s human capital existed, more heterogenous and to some extent scarcer than in highly developed countries, which, in return, created a specific competitive advantage (Unger et al., 2011). Moreover, a large “incorporated” entrepreneur is inclined to capital accumulation and business enlargement while the “unincorporated” consumes the surplus from business immediately and hardly accumulates financial capital which is another reason why SME was the most common type of occupational choice (Ibidem). Additionally, the developing banking sector gradually took interest in SME development with financings becoming less of a barrier to set up new business (Aidis, 2005; Ahmadov, 2020). However, the businesses were and remained small with their owners with either higher or lower but not so much intermediate education levels (Poschke, 2008).

On the contrary, limited access to public assistance, high administrative cost and tax burdens, inflexible labor legislation, an education system insufficient for entrepreneurship learning, inadequate transfer of technology, of commercial and of service infrastructure restricted the set-up and operating of SMEs and therefore, owners developed limited growth aspiration, including towards innovations (Aidis, 2005). One must bear in mind that structural change takes time, e.g., for the business sector between 10 to 15 years to rise from free-market economy entry to a stable stage of economic maturity (Samitowska, 2011; Dallago, 2017). As such, towards the end of the transition phase Poland had still not yet created a fully business-friendly environment (Samitowska, 2011).

As the emerging economy still showed a poorly performing labor market (Radu, 2018; Drinkwater et al., 2009), emigration became indeed a necessity for the completion of the modernization process (Lesińska, 2013; Karpestam and Andersson, 2019; Drinkwater et al., 2009; Anacka and Okólski, 2010). Mainly, emigration was possible due to access of better remunerated jobs at the segmented labor markets abroad, i.e., in the UK (Czaika and Reinprecht, 2022). Additionally, in opening border scenarios, trade and capital flows start liberalizing due to growing internal demand, improved productivity, increase in FDI and inflow of EU funds as well as better access to

information. Respectively, exports grow contributing to economic growth which attracts people into migration in even larger scale, ending up in “pre-empting” the Polish labor market (Okólski, 2005; Radeva, 2009; Polakowski, 2012). This happens typically at the initial phase of the transition when “trade and migration are short-term complements” until after its climax at “diminishing marginal utility”, creating labor opportunities in the home market to rise again. Migration is then no longer needed causing (partial) returns (Marks-Bielska, 2015; Olesen, 2002). For the sake of economic growth, trade substitutes migration to a great extent, though pathing ground for the “migration hump” (Marks-Bielska, 2015), though in moderate intensity in Poland (Okólski, 2005).

Since the EU enlargement in 2004, SMEs had to compete on an enlarged integrated market requiring dealing with related integration processes in times of increasing globalization, unfinished transition (Smallbone et al., 2001; Ubrežiová et al., 2008) and with new entries and new conditions for entrepreneurial acts (Pichur and Wach, 2007). Yet, the rate of new SME no longer increased as significantly as between the late 1980ies to the late 1990ies (Ubrežiová et al., 2008) but established since 2003 at around (net) 3 mill self-employed in average p.a. (Statista, 2022). By 2007, micro businesses employed up to 9 people and represented most businesses among the SME in Poland (95 percent Poland vs 73 percent Slovakia, Ubrežiová et al., 2008; similar Haber, 2017; Szymura-Tyc, 2015). The main entrepreneurial indicators such as share of SME, GDP, or national turnover have further developed convergent to the average indicators for the whole EU (Ubrežiová et al., 2008). These developments resulted from rigidly applying robust reform measures. Reducing budget deficit, inflation targeting, and increase of state revenues led to falling unemployment rates and increasing competitiveness against Western countries such as Germany, especially due to falling real labor unit cost (Czerniak and Rapacki, 2016; Åslund, 2013: 6, 7; Kępińska, 2007:1). These developments also materialized into resilience (Hyz and Gikas, 2012; Åslund, 2013; Iwasaki, 2021). It was particular visible during and past the financial crises when Poland outperformed economically in CEE as it was the only EU country to grow in 2009 (after a short down in 2008) because of relatively high domestic demand and because foreign trade made up only a small share of Poland's GDP (Iglićka and Ziółek-Skrzypczak, 2010) while e.g., Romania experienced a GDP decline of around seven percent or some Baltic states by 14 to 18 percent (Åslund, 2013). By 2010, moreover, up to 10 percent of the active SME could track their roots to times before 1989 (Tyszka

et al., 2011), confirming ambivalent historical path-dependency to former times (Naude, 2009; Rumiński, 2017; Nowicka-Franczak, 2018).

Over the following years, Poland experienced economic growth twice as much as Sweden, the next fastest growing economy in EU, because of “strong economic fundamentals and effective counter-cyclical policies” (cf. Åslund, 2013: 7). By 2014, real GDP growth settled at around three percent, far above EU average (Kaczmarczyk, 2015). The gap in GDP per capita, however, remained high between Poland and the EU (e. g., in 2013: 68% differential; *Ibidem*). Moreover, the country started to face no more progress in convergence (Dąbrowski, 2014) resulting in the fear of “getting stuck in the middle-income trap” with a GDP per capita at ca. 15,000 USD and therefore, economic stagnation or recession (Åslund, 2013). Further structural reforms were needed, especially with a focus on pension system (too costly), high overregulation (with regards to professions), high bureaucracy, and high amount of state corporations (Åslund, 2013). One related aspect concerned the low level of innovativeness: Poland has shown for long deficits in top R&D spending enterprises and market novelty (technology) innovations in both product and process while it had brought a large number of non-innovators without disposition to innovate (61 percent Poland vs. 31 percent EU) (EU Commission, 2021; GEM Report 2019/2020; Zawalińska et al., 2018; Stawska, 2016; Györffy, 2022). In addition, entrepreneurs had low social status which originates from the era of authoritarian socialism when entrepreneurship was regarded a way of earning money in dishonest ways (GEM Report, 2013; Rumiński, 2017). Different program initiatives funded by the EU have fostered financial stability, innovation, and entrepreneurship. They have been carried out by innovation and training centers under longer-term national and/ or regional developmental strategies such as the “Third Wave of Modernity”, “National Strategy of Regional Development 2010 – 2020”, or “Smart Growth Operational Program 2014-2020” (Klemes et al., 2017). Respectively, innovative entrepreneurship has risen which was “important for the emergence of the Schumpeterian innovative entrepreneur” (cf. Ahmadov, 2020: 207; similar Szymura-Tyc, 2015; Klemens et al., 2017).

Finally, “after a few years of necessity-entrepreneurship dominating, we saw a reverse in 2014 as opportunity became the main driver” (cf. Tarnawa, 2020: 2). Entrepreneurship, respectively, has developed to a more desired occupational alternative (GEM Report 2013; EU Commission Fact

Sheet, 2019) that has, respectively, received increasing scholarly attention (Karpenko et al., 2019). These developments resulted also in improvements on the social perception of entrepreneurship and on policy development to promote entrepreneurship (Ibidem; Brooks et al., 2019; Biggs, 2017). This was important as institutional trust and policy continuity play a decisive role for individuals starting and maintaining business as these factors shape economic order and senses of security (Młokosiewicz and Misiak-Kwit, 2017).

By 2015, Poland's economy still grew at fastest pace in four years (Krajewski and Goetting, 2016; Szczurek and Tomaszewski, 2018: 4). Despite the Polish business sector had developed vibrantly, vulnerable employment remained overall high: for instance, the share of (unpaid) family workers and own-account workers amounted to 17 percent of total employment, significantly above the rates of other CEE countries (Szczurek and Tomaszewski, 2018). Regular employment became more expensive and challenging through e. g., high social security contributions or difficulties in adjusting years of service which is why contracting employees limited in time became a preferred choice of engaging hirings. Individual self-employment, alternatively, is of less rigidity and less costly which is why this form of occupational choice remained widely preferred. However, such system duality hinders innovative skill formation in the long run (Ibidem). Despite overall positive economic outlook, rating agencies cut Poland's credit rating down due to weakening the independence of key institution such as the judiciary and public media (Krajewski and Goetting, 2016). The role of the entrepreneur developed into monitoring the environment and searching even more alert for new opportunities and new solutions (Paulina, 2017). Through optimism and creativity, the Polish entrepreneur was able to implement necessary change in running and maintaining business (Ibidem). Cowling et al. (2019), respectively, found that self-employment rates were higher in less developed countries, including the "New European countries", and that by 2015 the rates were almost par to "old Europe" (cf. Cowling et al., 2019: 4 and 11).

By 2016, a significant correlation between GDP and the number of SME has established, for micro and small businesses there is an even strong relationship but not as strong as for medium sized businesses (Woźniak et al., 2019). However, Poland's growing sector of state owned or state-controlled enterprises would resemble the individual, capitalist entrepreneur by the single entrepreneur "whose function and intervention exceed to liberal economies and beyond market failure areas",

thus leading to “state capitalism”, a modified variation of capitalism with increased government ownership and control (Kozarzewski and Bałtowski, 2019: 3-4, 22).

About 18 years after the fall of communism, Poland was elevated into the group of developed economies in 2017, i.e., per FTSE Russell Developed All Cap Index, and has since been considered a developed economy, despite lagging in innovations (Radu, 2018; Bogdan et al., 2015; Brzozowski et al., 2020). It has developed favorably also with regards to being listed on the OECD High Income Nations list or United Nations’ Human Development Index (Scheu and Kuckertz, 2022; Dzięglewski, 2016). Poland is the only country within CEE to have achieved this, with the economy doubling over the last decades in terms of real GDP and emerging even to the eight-largest EU economy (Bogdan et al., 2015; Piatkowski, 2021). Polish SME reached the same level of value adding as SME in the EU (EU Commission, 2019). The SME businesses showed growth rates alike to those of larger firms but with higher dependency on domestic demand (Ibidem). Yet, 55 percent of the start-ups were predominately in early-stage development (Brooks et al., 2019). Respectively, voices claim the transformation process to still be unfinished (Nowicka-Franczak, 2018) and that unproductive entrepreneurship is rising (Wasilczuk and Stankiewicz, 2017). By 2021, about 67 percent of established Polish businesses between 2016 and 2020 were still active, though the number of bankruptcies or need for restructuring increased, depending on location of the businesses, industry and Polish GDP development (Statista, 2022; Rosak-Szyrocka, 2019).

Two additional factors require attention when discussing entrepreneurial spirit of Poles both in historical and contemporary perspective. For one, there has been an everlasting focus on education. Through education opportunities such as education programs in pre-war times, secret universities during WWII, later secondary and higher education to the mass, establishment of universities or private institutions etc., Polish society has continuously enhanced educational and moral values that strongly support entrepreneurial spirit (Tanas, 2007). For acceleration in closing gaps on entrepreneurial knowledge, the program “the Basics of Entrepreneurship“ (2002), the Law on Higher education (2016) or the development of the “Database of Development Services portal” by the Polish Agency for Enterprise Development contributed “to make the new Polish higher education system more innovative and relevant for economic development” (cf. OECD Library, 2017). Such supportive framework has shown for the case of Poland to positively influence an individual’s

propensity into entrepreneurship (Dvouletý and Orel, 2020). Respectively, “every other [Polish] person believes that they have sufficient skills and knowledge to run a business” (GEM Report 2019/ 2020; OECD library, 2017). Individual differences and richness of a learning environment have led to knowledge and thus human capital establishing an effective behavior (habit) to become a successful entrepreneur (Unger et al., 2011).

The second factor is the institution of family businesses that contribute to economic development by about 80 percent of all Polish SME (Marjański and Sułkowski, 2021; Wach, 2014; Tien, 2021). Family entrepreneurial background is an important driver for first and next-generation entrepreneurial choices as spillover effects are easy to generate (Rona-Tas, 2006; GEM Report 2019/ 2020). Respectively, when in need, the entrepreneur consults rather family but seldomly other entrepreneurs (Figiel and Ostrowski, 2015), although entrepreneurial cooperation is a well-known factor of progress (Brożek, 2014). Moreover, many family-owned businesses have successfully undergone a regulated succession process and are now controlled by the second generation of the founding family (Marjański and Sułkowski, 2021). Additionally, through the focus on sustainability, more and more family businesses intent to expand internationally and are motivated more by “entrepreneurial behavior than due to exhausting all opportunities for operating in the domestic market” (cf. Marjański and Sułkowski, 2021: 32; similar Tien, 2021). However, there were times when these businesses were regarded anti-family as running a business requires full dedication and making mistakes will end up in household ruins. Thanks to the positive economic development of the Polish economy, also the cultural perception of entrepreneurship has changed more to the positive as self-direction and self-guidance offered new ways of (independent) living styles (Rumiński, 2017). Vulnerability to family business remain, however, as sudden shocks like COVID-19 crisis revealed that a prolonged state of entrepreneurial uncertainty threatened business continuity, mainly from financial perspective and employee maintenance as in this case, historical knowledge or past experience were not available for strategic adjustment (Marjański and Sułkowski, 2021).

In summary, entrepreneurial traits of creativity and risk-taking together with a high degree of alertness and education (knowledge) have put Poland in a favorable economic state over time: “Balanced skills are key for entrepreneurship [...] particularly [in] the case of developing economies” or highly imperfect markets (cf. Mahé, 2018: 13; similar Aidis, 2005). Today, SMEs represent

most enterprises in Poland (ca. 99 percent) that generate more than 70 percent of GDP value and employ almost 10 mill people (Marjański and Sułkowski, 2021; Yakivna et al., 2019; Bajdor et al., 2021). Among the SME, micro businesses count for about 96 percent (93 percent EU-28, 2018) while small businesses count for about 2,9 percent (5,9 percent EU-28, 2018) and medium sized businesses count for less than 1 percent (also EU-28, 2018) (EU Commission Fact sheet).¹⁵ About 92 percent of Polish entities belong to natural persons out of which 98 percent are micro enterprises (Czarniewski, 2016). In 2020 there were more than 1,8 mill micro-businesses in trade, construction, or industry with an annual growth in turnover of about 1.8 percent and growth rate of 2.5 percent (Statista 2022; Czerniak and Stefański, 2022). Micro businesses grew fastest between 2014 to 2018 outperforming small and medium sized businesses, yet overall all at growth rates, job creation and value adding at similar rates to EU-28 countries (approx. 53 percent to 56 percent) (EU Commission Fact Sheet, 2019). SMEs have therefore become the backbone of the Polish economy (Brożek, 2014). Moreover, the household disposable income increased because of decreasing unemployment, increase of minimum wage and policy measures such as increased child benefit (EU Commission Fact Sheet, 2019).

Finally, considering Poland's historical and economic development in relation to return migration, "there can be no return to *status quo ante*" of former emigrees to Poland (cf. White, 2022: 2). This is because personal ties of the individual and social realities of involved home and host country environments have fundamentally transformed and developed over time (Dzięglewski, 2016). Building on lifetime experiences, including from migration, the returnee lifts past experiences into the dimensions of again new realities. This makes, in return, (scholarly) research and understanding of return migration in relation to transformed economies even more complex, and the studies of economic impact of return migration even more "contingent on the place, time and circumstances of return" (cf. King, 2022: 314).

¹⁵ For Poland SME, the following delineation criteria apply (based on Yakivna et al., 2019; Brożek, 2014): Micro business (annual income equal/ less 2 mill EUR, less than 10 employees, balance sum equal/ less than 2 mill EUR); small business (annual income equal/less 10 mill EUR, 10-49 employees, balance sum equal/ less 10 mill EUR), medium sized business (annual income equal/ less 50 mill EUR, 20-249 employees, balance sum equal/less 43 mill EUR), large enterprise (all indicators above medium sized business), aligned with EU Commission Definition, yet extending on the phrase "in at least one of the two financial years" (Bajdor et al., 2021).

4.2.2 The contemporary Polish entrepreneurial persona

The contemporary Polish entrepreneur, unquestionably, has historically until present shown self-sufficient, creative, and risk-taking characteristics in times of high uncertainty along with strong commitment, special motivation, self-determination, and the ability to adapt business strategies to fit changing market conditions “without the need to be taught” (cf. Tanas, 2007: 83; similar Tyszka et al., 2011; Bursiak, 2016; Marjański and Sułkowski, 2021). Although their “private firms have gained considerable economic importance in the national economy of Poland” (cf. Hyz, 2006: 43), many of the elder entrepreneurs were no longer profitable: shortages in supply or not applying appropriate business models caused failures, especially in the early years of transition (Tanas, 2007; Tyszka et al., 2011). However, by developing and applying above characteristics, it became possible that “over the past 25 years, a new social class, that of entrepreneurs, has emerged in Poland” (cf. Figiel and Ostrowski, 2015: 67). In light of their economic achievement, they are considered among “the winners of transformation process” (cf. Boruc, 2018: 49).

By 2019, ca. 18 percent of Polish adults were involved in entrepreneurial activities; every 5th Pole (approx. 1.3 mill) in working age between 18 to 64 years ran a young business, 3 of which were in process of setting up business while 2 ran their business for a period of 3 to 42 months (Tarnawa, 2020a). 13 percent (approx. 3.1 mill) run established business that had lasted already 3.5 years (Ibidem). The owner of a young business was male (53 percent vs. 47 percent female) (Boruc, 2018), in the age of about 38, secondary educated, from a family of 4, who wanted to earn a living, to build on previous work experience and to **become independent in the professional field** (Tarnawa, 2020a). If the business environment is positive, it is felt easy to start a business, despite jobs are scarce (GEM Report 2019/ 2020; Tarnawa, 2020a). He was motivated to build human capital by himself while using external financing source (Tarnawa, 2020a). Common for a married couple was one partner being engaged in one’s own business, the other one pursues paid employment as a strategy to distribute the risk associated with entrepreneurship (GEM Report 2013).

Primarily, the contemporary Polish entrepreneur’s focus remained on the domestic market and local customers (91 percent). About 22 percent offered new products and services to the local market or used new technology and methods (34 percent) (Tarnawa, 2020a). The biggest number

of SME enterprises were found in wholesale trade, retail, and food industries (butcher, baker), land transport, buildings, electricians, and plumbing while micro-businesses more in the retail trade and other services (Czerniak and Stefański, 2022). Due to efficient use of existing capital and labor and increased propensity to invest, the contribution to innovation has risen. However, credit restraints, tax burden, bureaucracy, or war for talent are (still) obstacles to economic growth (Czerniak and Stefański, 2022) and to long-term survival (Masiukiewicz and Dec, 2014). The survival rates of Polish SME used to be no more than 20 percent in the first year (Ibidem). Because small or micro business owners applied a more intuitive management approach in how they run their business, a failure rate of about 70 percent in the first or second year of service occurred (Haber, 2017). Moreover, businesses established by these natural persons had a lower survival rate than businesses established by legal persons (Boratyńska, 2013).

Out of those who spot business opportunities, 46 percent do not set up a business in fear of failure which limits the level of entrepreneurship at national level (Rumiński, 2017). Other reasons were being bound to financial obligations, lack of capital, lack of faith in one's skills, lack of needed knowledge or management, lack of ideas, lack in trust to others, or non-profitability (Tarnawa, 2020a; Czerniak and Stefański, 2022; Rosak-Szyrocka, 2019). Consequently, these businesses do not hire employees and do not wish to increase sales (Czerniak and Stefański, 2022).

The above persona is distinct to the persona of an innovative start-upper in the Polish economic practice, as introduced by Jędrzejczyk and Kulej (2023). Their entrepreneur is not so much an ordinary entrepreneur as by will, their entrepreneur changes deliberately status quo for improvement and is as such closer to Schumpeter than Kirzner or Knight.

5 Empirical analysis of Polish returnee business development (2007 to 2015)

Migration is a mass phenomenon in quantitative sense with regularities, patterns and mechanisms observable and to be discovered only in sufficiently large number of cases (cf. Okólski, 2012: 53). There are, however, only a few studies that have simultaneously addressed both entry into and survival of return entrepreneurship (Mahé, 2018; Brück et al., 2018; Smoliner et al., 2013). Based on a longitudinal data set for Kyrgyzstan, Brück et al. (2018) fill the “lacuna in literature” seeking to answer the questions whether returnees are more likely than non-migrants to enter *and* to sustain self-employment activities, and whether this decision is influenced by prior migration experience in self-employment (Brück et al., 2018; Mahé, 2018). The results of their study indicate that migration rather than prior migration experience influences entrepreneurial abilities upon return. Moreover, return migration increases the likelihood of engaging in self-employment upon coming home, although it tends to be more driven by temporary necessity rather than opportunity, serving then as a bridge to more secure wage-employment after readapting to the home country (Mahé, 2018: 149). Moreover, there is more literature on analyzing data in context of single labor migration than household relocation (Fuwa, 2010: 4). More recently, the classical Roy model of occupational self-selection has been reexamined, specifically in the context of emigrants showing a positive selection trend. This trend is observed when the expected earnings of migrants surpass those of individuals choosing to stay. However, for returnees, the nature of selection becomes more pronounced, highlighting the initial immigrants' type of selection (Borjas et al., 2019). The following empirical analysis contributes further to filling the gap in literature.

5.1 Discussion on data availability on Polish return migration

The measurement, comparison, and interpretation of study results related to return migration pose challenges in the lack of reliable, comparable, and qualitative data at both local and international levels (Wahba, 2021). The absence of formally agreed definitions and tailored research methodologies further complicates this endeavour (Kaczmarczyk and Okólski, 2007; Martin and Radu, 2012; Smoliner, 2013; McLeish et al., 2020: 10). Moreover, the collected data is retrospective rather than

prospective, lacking ex-ante information that could enable countries to better anticipate and respond to forthcoming population shifts (Bekaert et al., 2021; Sirbu et al., 2020).

To ensure the rising complexity of international migration is captured in structured way, the research field of migration has institutionalized through a growing number in international institutions and forums that concentrate on desired statistical data processing, analysis and their continuous improvement (Ahmad and Hoffmann, 2007; Pisarevskaya et al., 2020; Penninx et al., 2008). Relatedly, institutional annual reports on international migration have appeared since the late 1970ies by the Council of Europe, OECD, UN, or ILO, followed in the 1990ies by the EU Commission or the IOM (Penninx et al., 2008; Debnath, 2016), to which, for many years, also Polish scholars have contributed sustainably (e.g., Kaczmarzyk et al., 2012). However, due to their diversity, the provided definitions, terms or concepts require “elaboration and adaption to national circumstances” (OECD, 2007; Bedford, 2009).

The availability of longitudinal data is even more problematic. Existing studies merely focus on analyzing the motivations of return from the perspective of immigrants while still staying in host countries, such as for Australia (Longitudinal Survey of Immigrants to Australia, cf. Abarcar, 2017), Germany (German Socio-Economic Panel, cf. Kirdar, 2009 and the older study of Dustmann, 1996), Italy (ISTAT survey Income and living conditions of families with migrants, cf. Paparusso and Ambrosetti, 2017), or for the Netherlands (Dutch immigrant register, cf. Bijwaard et al., 2014). These analyses are restricted to the moment of when return takes place and afterwards the returnee disappears from researchers’ lenses. When it comes to data on return migration from the home country perspective, most of the registers or surveys offer a static perspective as the datasets are mostly cross-sectional, i.e., data is collected at one point in time rather than over a same period of equal time intervals. Therefore, such surveys or registers are limited in application when it comes to dealing with causal ordering. This was the case of the MIREM survey conducted 2006-2007 in three Maghreb countries – Algeria, Morocco and Tunisia (Gubert and Nordman, 2011), 2009 Kosovo Migration Survey (Gashi and Adnett, 2015), European Social Survey (ESS rounds 4 and 5 for the years 2008 and 2010) or the Eurobarometer EB73-3 for March-April 2010 (Zaiceva and Zimmermann, 2016), a household survey in Moldova from 2006 (Pinger, 2010), or qualitative survey conducted among Hungarian returnees (Lados and Hegedűs, 2019). Moreover,

cross-sectional studies bear the risk of endogeneity due to unobserved factors that jointly affect the outcome (Brzozowski and Coniglio, 2021).

However, “to study migration is to study change” (cf. McLeish et al., 2020: 106). To investigate dynamic life event over an individual’s lifetimes, the quantitative research design of longitudinal panel data is most adequate (Hsiao, 2007; McLeish et al., 2020; Andreß, 2017; Baltagi, 2005), especially in economic context studying behavior of firms or earnings of people over time (Yaffee, 2005). Such valuable primary data tracks and follows the same type of information on the same individual at multiple points in time (“within estimations”), i.e., persistence and change within the unit of analysis are measured allowing for investigation on how an event changes outcome (McLeish et al., 2020; Zakharenko, 2008; Brüderl and Ludwig, 2019).¹⁶ Furthermore, panel data allows to study individual trajectories as well as transitions into and out of personal circumstances (Brüderl and Ludwig, 2019), e. g. migration (Brzozowski and Coniglio, 2023). Additionally, it targets inconsistency through repeated surveying (Baltagi, 2005) which enhances the quantity and quality of the data (Yaffee, 2005), especially when ex-ante information and ex-post information are available to causally assess relationships between influencing variables to analyzed outcome, e.g., return migration and entrepreneurship (Brzozowski and Coniglio, 2021). Furthermore, panel data accounts for individual heterogeneity, more variation, less collinearity among variables and dynamic adjustment in order to increase estimation efficiency (Baltagi, 2005). Sample selectivity and biases due to omitted variables can be controlled (Fuwa, 2010; Andreß, 2017). Finally, potential biases resulting from aggregation can be reduced (Baltagi, 2005; McLeish et al., 2020).

Despite these advantages, there are methodological problems in analyzing panel data: in every wave, participants show an unobserved response propensity and they may follow different or dynamic attrition (or mortality) processes (Fuwa, 2010; Lugtig, 2014; Brüderl and Ludwig, 2019). Individuals surveyed initially may either drop out from the survey through natural causes (death, change of residence, going abroad), miss out on one or two surveys in lack of e. g. commitment, re-enter or fully decline to participate further at some later stage (Lugtig, 2014). Nevertheless, every participants leave result influencing footprints in the surveys (Ibidem).

¹⁶ In delineation, there is a third hierarchy of data structure which is event history data that provides information on complete life courses (cf. Brüderl and Ludwig, 2019: 7).

Particularly, sample attrition is quite a methodological challenge when the migrant household (unit of analysis) is (partially) mobile and therefore hard to track at times of surveys (McLeish et al., 2020; Andreß, 2017). Moreover, there is great diversity among surveyed (migrant) households. Household relocation is, additionally, likely to be selective, e. g. in terms of education etc. (Fuwa, 2010). If, for instance, migration is viewed as a household strategy (NELM), migration of particular groups from a household such as children or the entrepreneur cause statistical challenges due to double selection or unobservability of these features (Fuwa, 2010; Sander, 2007). Statistically it is decisive which unit, i.e., the individual or the household, is tracked to reflect on the consequences of their leaving (or returning) as for instance if counted on individual level, a higher rate of leavers may be found that influences results more significantly, despite migrants being a small group to overall sample size number (Fuwa, 2010). Also, to distinguishing migrants from non-migrants, two dimensions are statistically challenging to capture: 1) time, i.e., actual duration of migration or intended duration of staying aboard, with no fixed time thresholds, and 2) space, i.e., boundaries (McLeish et al., 2020; Raymer et al., 2013; King, 2013; Pauli, 2021). Furthermore, setting the appropriate comparison groups is challenging as to how to identify the potential migrant within a household that has not yet send a migrant, compared to those who are a migrant sending household with a particular migrant and particular stay behinds (Murard, 2019). All these circumstances ultimately diminish statistical power (Lugtig, 2014). This is due to both a smaller sample size when accounted for and potential statistical bias if the characteristics of those lost to follow-up differ from those who remain included (McLeish et al., 2020). However, from literature findings, these attrition bias appear to be rather insignificant in the estimation of behavioral coefficients also in economic context due to (large) heterogeneity among different types of units of analysis, e. g. types of households or number of migrant households etc. (Fuwa, 2010). This also applies in comparison to non-migrants (Fuwa, 2010: 23). Furthermore, measurement errors occur due to non-response, faulty responses to unclear questions, memory errors, deliberate distortion of responses, inappropriate informants, infrequent participation and the more (Baltagi, 2005; Lugtig, 2014).

In addition, when conducting longitudinal outcome measurements, it is crucial to thoughtfully select both general and key indicators. These choices should accurately capture the specific aspects of the survey that align with the interests of academia, policymakers, other stakeholders, or users (McLeish et al., 2020). These can be set for returnees along with variables of interest such as age,

gender, education, country combination, business ownership, income etc. (Ibidem). Each of the indicators and related issues need to be explained through descriptive statistics with regards to the target audience, e. g. specialist and non-specialist, and to understand data limitation and overall limitations to a study (Ibidem). Yet, capturing observable characteristics, such as education, and unobservable traits like ability, which collectively play a crucial role in explaining earnings, remains challenging (Cattaneo, 2007). This difficulty is compounded in the context of explaining the complexity of migration, given its inherent nature of self-selectivity and non-randomness (Drinkwater et al., 2009; Brzozowski and Coniglio, 2021; von Bloh, 2021).

With regards to existing studies based on scarce panel datasets, the representatives remain a key issue, as most of them are not drawn from the general population, but from the selected beneficiaries of some return migration assistance programs, like the Return of Talent program in Jamaica (Thomas-Hope, 1999). Other studies collected data over a relatively short time period, for instance Croitoru's study (2020) on return migration outcomes in central Romania that relies on four waves of surveys conducted between 2015 and 2018 with the additional problem of small sample size, which led in the empirical analysis to the usage of pooled data for one time period (2015-2018). Consequently, in her recent literature review on return migration, Constant (2020) calls for more representative longitudinal surveys with standardized definitions which more reliably enable cross-country comparisons of return flows and their impact on home country economies.

In Europe, with established freedom of movement and work it has been difficult to study cross border flows and stocks of EU immigrants, unless everyone was registered officially (Sirbu, 2020; King, 2013; Wiśniowski, 2017). For the case of Poland this is challenging for many reasons. Firstly, the number of people with migration experience "is still unconfirmed" (Isański et al., 2013; Drinkwater et al., 2009; Engbersen et al., 2010; Filimanou and Mika, 2019). Secondly, while temporary and circular international migration has become an important livelihood strategy, large parts of these flows used to be irregular and as such without registration (Engbersen et al., 2010; Kaczmarczyk et al., 2020a). Thirdly, volunteer de-registrations when exiting Poland were perceived unnecessary or disadvantageous causing "biased official estimates" (cf. Kaczmarczyk and Okolski, 2008: 600). The number of Poles counted as (permanent) residents may seem quite high even if some of them have *de facto* ceased to live in Poland, causing reliability problems (Kaczmarczyk

and Okólski, 2008; Kaczmarczyk et. al, 2012; Anacka and Okolski, 2010; EU Commission, 2019). “All this makes labour re-migration an underdeveloped, emerging research field” (cf. Filimanou and Mika, 2019: 14).

Attempts have been undertaken to close this gap: For Poland, statistical data collection is predominately done by the National Central Statistical Office (Główny Urząd Statystyczny, now called Statistics Poland, based in Warsaw) and its regional affiliates. Statistical data collection systems do exist and quite some data is available (Kaczmarczyk, 2006; Lesińska, 2013). Specific data on Polish return migration is, however, still scarce (Anacka and Wójcicka, 2019). Moreover, merely cross-sectional surveys have been undertaken, particularly during the peak of post-accession migration between 2010 and 2014 in several Polish voivodeships. The availability of European funding contributed to collecting valuable data: most of the surveys were representative and included large sample sizes. Unfortunately, they were not coordinated between the ordering authorities (mostly: voivodeship-regional authorities), thus the questionnaires differed substantially, the definition of international and return migration differed and more importantly, the availability of raw data for academic purposes was limited (Bijak and Koryś, 2006; Brzozowski et al., 2015).

One of a few academic studies resulting from such surveys is the paper of Brzozowski and Coniglio (2016) on the economic reintegration prospects of return migrants in the Silesian voivodeship (województwo śląskie). They demonstrated that the quality of foreign work experience matters for future performance upon return. Yet, the perspective of entrepreneurship is not included in their study. As for other sources of data, Fihel and Anacka (2012) took the advantage of the National Census in 2011 to estimate the share of those post-accession migrants who returned to Poland until 2010. The census dataset is also cross-sectional, and moreover, it captured only the initial wave of return migration which started with the financial crisis of 2008-2009. Unfortunately, when it comes to data from Census 2021, the individual data on return migration is of poor quality. According to NSP 2021 (Narodowego Spisu Ludności i Mieszkań 2021 – National General Census of Population and Accommodation 2021), on 31st March there were 1.447 mill Poles living temporarily abroad (out of them 92% living abroad for a period of at least 12 months, GUS, 2023), whereas around 2% (ca. 740 thousand) are foreign-born ethnic Poles. This population includes both relatively old Polish citizens born in pre-1945 Poland territory (now mostly Lithuania and

Ukraine), as well as increasingly new cohorts of young returnees (Grzelak-Michałowska, 2022). Yet, the possibility to identify those individuals and their economic activity in Poland is limited. As for other obvious sources of data from the Polish Labour Force Survey (BAEL – Badanie aktywności ekonomicznej ludności), the panel dimension is restricted as for instance one fourth of survey respondents are changed every quarter, and the repetition is partially done only for year with then new households surveyed (BAEL, 2022: 1). Therefore, the size of return migrants subsample is too small to conduct meaningful analyses.

Consequently, the available SD survey is supposedly the only available source of panel data from which a dynamic analysis of return migration effects on entrepreneurial activity of Polish returnees can be conducted.¹⁷

5.2 Social Diagnosis: description of used dataset and its transformation to panel setting

Focusing on this dissertation, the SD datasets and reports were regularly issued between 2000 and 2015, providing descriptions of the conditions and quality of life in Polish society, its development potential, the direction of changes as well as the threats and challenges. SD from its early origins was intended as a representative, longitudinal household survey that analyses various aspects of contemporary life of the Polish population (Czapiński and Panek, 2003). For this research project, the relevant data is included in the waves 2007, 2009, 2011, 2013 and 2015, as only there information about migration of surveyed individuals and on migration of other household members was collected. As the SD project aimed to gather fully representative data, it was run across all administrative regions (voivodeships) in Poland.

The project was a “scientific project” rather than an “ordinary opinion poll” as professional techniques were applied based on scientifically grounded knowledge, theoretical context of the particular thematic modules and research experience (cf. Czapiński and Panek, 2015: 1). It intended “to verify scientific hypotheses” but also “to reveal what Polish society [has become of] like 26 years

¹⁷ Another longitudinal survey POLPAN (Polskie Badanie Panelowe – Polish Longitudinal Survey, available at <https://polpan.org/en/>) includes some limited information on return migrants and their economic activity in Poland upon return but the sample size is too small (i.e., max. dozens of individuals per wave, with relatively large attrition rate of returnees across waves).

after system change, 15 years after the first study within the project and 11 years after Poland's accession to the European Union” (cf. Czapiński and Panek, 2015: 1). Respectively the survey intended to be fully representative of the Polish society (Brzozowski and Coniglio, 2021). Unfortunately, due to cuts in financing this longitudinal study finalized with the 2015 wave.

As the survey aimed for comparative analysis of living conditions and quality of life in Poland, it includes detailed information on life quality (e. g. education, aspirations, current and past location), and (economic) living conditions of individuals and their households (e. g. income, savings). Including equally **individual and household information** is of high relevance as this is a set up in line with the theory New Economics of Labour Migration (NELM), which – as described in the theoretical section of the dissertation – considers the household as the center of economic decision-making, including migration decisions. The unit of analysis is individual-level data to which a set of information derived from the household-level survey is linked. Respectively, the dataset contains information on all members of each surveyed household (through *household questionnaire*) as well as a more detailed one on the economic activity of each individual surveyed (through *individual questionnaire*, filled in by each member of the household aged 16 and above who was present at the moment of survey). The data set therefore allows for employing an individual-level within-household approach (cf. Brzozowski and Coniglio, 2023: 7). Furthermore, it allows to identify non-movers in a household that self-select into migration over time and that is based on individual fixed-effects by which observing certain characteristic is possible, e. g. whether an entrepreneur is among the migrants from the household (Ibidem).

The study started in 2000 and continued in waves every 2 years from 2003 to 2015. The number of individual respondents developed from 6,614 in 2000 to 26,307 in 2013 and to 22,200 in 2015.¹⁸ The number of households included in the survey developed from 3,005 in 2000 to 12,352 in 2013 and 11,740 in 2015. The numbers of the included households were weighted to account for the total number of the households and the general population for each region (Czapiński and Panek, 2015). However, details of household members' past migration experience are included only in

¹⁸ These numbers include only individuals who completed the individual questionnaire. The SD survey included, in total, 26,685 households with 84,479 members and 62,541 respondents who participated in the individual survey. Based on the household survey and its questionnaire, we can extract relevant information on all household members (including temporarily absent individuals who did not complete the individual questionnaire). Data from household survey also include information on temporary absence due to international migration, distinguishing between migration for educational and work reasons; see also Brzozowski and Coniglio, 2021: 11).

the waves of 2007, 2009, 2011, 2013 and 2015 (cf. Brzozowski and Coniglio, 2021: 10). To re-note on migration statistics from above, by 2004, about 1 mill Poles lived outside Poland, and by 2015, the number of such individuals estimated to about 2.4 mill Poles abroad, mainly in the UK, Germany, the Netherlands, Ireland and Italy (Brzozowski and Coniglio, 2023: 6).

With respect to attrition, the **survival rates of households and individuals** were **high**, given the survey's bi-annual collection rate. On average, more than 70 percent of the respondents were re-interviewed from one wave to the next wave.¹⁹ In 2015, the research team reached 8,817 households (71.38%) from the 2013 sample with 26,078 same members (72.64%) and 17,498 same individual participants (66.51%). In the case of original, the initial sample from the first wave carried out in 2000, the 2015 wave involved 525 households (17.47 %) with 1,263 members (12.68 %) and 711 individual respondents. In their study, Brzozowski and Coniglio (2023) performed tests for attrition bias in the SD dataset and concluded that for investigating international migration of individuals and of household members, “the attrition [is] unlikely to be of great concern” and does not affect the empirical analyses in significant way (cf. Brzozowski and Coniglio, 2023: 23).

This dataset is publicly available through the web page www.diagnoza.com, yet each wave is available only in cross-sectional form as, for instance, it was used to analyze the intentions to use Internet-based healthcare services by the members of households (Duplaga, 2012), determinants of job satisfaction (Wilczyńska et al., 2016), or determinants of changes of unhappiness rate over time (Brzeziński, 2019). However, in spite of the fact that the questionnaires for each wave were standardized and included – at least partly – the same battery of questions, the same set of questions and the available cafeteria of responses changed from wave to wave which is challenging for comparison and interpretation. Consequently, the usage of the panel dimension of SD required a *harmonization of the data*. The harmonization process was a highly user unfriendly and time-consuming action for a researcher, which probably explains why so far, the SD data was exploited mostly in cross-sectional format. The desired transformation of the available panel SD dataset was, at the

¹⁹ These numbers include only individuals who completed the individual questionnaire. The SD survey included, in total, 26,685 households with 84,479 members and 62,541 respondents who participated in the individual survey. Based on the household survey and its questionnaire, extract relevant information on all household members (including temporarily absent individuals who did not complete the individual questionnaire) can be extracted. Data from household survey also include information on temporary absence due to international migration, distinguishing between migration for educational and work reasons; see also Brzozowski and Coniglio, 2021: 11).

end, constructed by Nicola Coniglio (University of Bari Aldo Moro, Italy) and Jan Brzozowski (Jagiellonian University in Krakow, Poland), who subsequently used it in their empirical analysis on determinants of international motivations and migration decisions (Brzozowski and Coniglio, 2021) and on investigations of remittances sent by migrants back home (Brzozowski and Coniglio, 2023).

Respectively, the **advantage of this thesis** is the fact, that the author had **privileged access to this matched and harmonized panel form of SD**. The uniqueness of this data is that it contains clear, detailed, and finite information about return migration of individuals and their economic activities upon settling in Poland. To the knowledge of the author, **there is no other such panel data** that enables researchers to track re-integration of emigrants along with their occupational choice (i.e., entrepreneurial activities). As such, this unique dataset and its related window of analysis opportunity provides a **clear competitive advantage of this empirical approach**, and thus creates the possibility to make the desired contribution to academia on international migration and development and to studies on return migration and entrepreneurship in a developed country.

5.3 Definition of Polish return migrant

According to Polish statistics (2007), immigrants are “people who have arrived to Poland from abroad, decided to settle in Poland after having lived permanently in another country, and have so registered in a given administrative unit. This applies to both foreign and Polish citizens (who previously were living permanently abroad)” (cf. Kępińska, 2007: 9). Consequently, Poles abroad that return to Poland are considered immigrants for statistical purposes (Okolski and Wach, 2020: 146) and for whom statistical data processing was done for those who registered for three months and above (Kaczmarczyk et al., 2012; Kępińska, 2007). In the Polish case, the three-month period has set the minimum threshold for distinguishing migration from travel for business, leisure, or commuting etc. Researchers, additionally, apply similar time periods, as for instance Anacka and Fihel (2012), Zaiceva and Zimmermann (2016), Brzozowski and Coniglio (2016), or King and Kuschminder (2022). Moreover, Brzozowski and Kaczmarczyk (2014) show that a significant portion of post-accession migrations from Poland was temporary, short-lasting, and conditional in desire to earn the migration differential (EU Commission, 2018), confirming the “feeling of

temporariness” (cf. Kijonka and Żak, 2020: 116). This was also true because returning home remained an option, unlike in times before 1989 (Ibidem). Specifically with regards to the UK, Chlebek (2011) assesses post-accession migration for Poles to the UK to have typically lasted between three to 12 months (Chlebek, 2011; similar Marks-Bielska, 2015; Grabowska et al., 2023).

With regards to the available SD reports, (Czapiński and Panek, 2003), the following details show how migration definitions and durations have developed over time:

- 2007 SD Report: “Less than 6 months abroad”, “less than 12 months abroad” (p. 90)
- 2009 SD Report: “short-term emigration”, i.e., circular, seasonal migration for less than 12 months, including return (p. 72)
- 2013 SD Report: “number of people remaining abroad for 12 months” (p. 138)
- 2015 SD Report: “persons residing abroad for 3 months or longer” (p. 138).

Respectively, for the purpose of this dissertation, the working definition of a Polish return migrant, present in Poland at times of the surveys, is suggested as follows:

A Polish return migrant is a former international migrant who returned to the country of departure (Poland) of which the individual was absent for at least 3 consecutive months in any period of the given years from 2007 to 2015.

5.4 Variables: Operationalization of independent and dependent variables

The most important variable of interest for this study is return migration status. Accordingly, the relevant surveyed Polish return migrant

- a) was considered as a household member in at least one of the restricted waves;
- b) was present or residing in Poland at the moment of that survey (although not necessarily had to participate in the individual survey);
- c) was working or studying abroad in the last 2 years before the survey.

Information on the length of the migration episode (in months) and on the number of migration episodes of the returnee is available. SD further provides information on the host countries from

which the returnee originated. Consequently, the **main independent variable in this study is return migration (status)**, which is a dummy and takes the value of 1 if the individual has returned from international migration in the previous 2 years, and 0 otherwise. Also lagged dummies for return are included, i.e., *return in the previous wave* (3 to 4 years before the survey) and *return 2 waves ago* (5 to 6 years before the survey), to capture long-term effects of return migration on the economic activity of an individual. Some other dimensions of return are also exploited, including the motivations of return expressed by some of respondents, though for that variable the sample is smaller. Recurring to the classical typology of return migration by Cerase (1974), three dummies were created: *return of success* (i.e., when the individual returned as planned to prior to migration or has completed education), *return of failure* (i.e., the individual has lost the job, could not find a job or experienced a decrease of income abroad) and *return due to other reasons*.

Furthermore, (“other”) *self-employment* and *entrepreneurship* can be addressed separately in the analysis. In many studies, self-employment is considered a proxy for entrepreneurship, but some authors signalize some limitations of this approach (Szarucki et al., 2016). Accordingly, and as outlined earlier in this dissertation, to analyse entrepreneurship and self-employment separately is important as these are two distinct forms of entrepreneurial activity. Thus, entrepreneurship status of an individual takes the value of 1 when individual works on one’s own account as an entrepreneur who also employs other workers, whereas the self-employed person is an individual who works on one’s own account only. As for measuring entrepreneurial performance, the *income of the household* (log of income in last month and log of average monthly income in last year) and *individual income* (log of average net monthly income in last three months) are available and mostly used. Additionally, one dummy which measures precisely entrepreneurial failure is used: *lost money doing business* which takes the value of 1 if the individual claimed in the individual survey to have lost substantial funds while doing business in previous year.

Respectively, **the main dependent variables for economic activity of the individual are dummies: self-employed, entrepreneur, started own business last year and invested in productive activity last year.**

The descriptive statistics on returnees are presented in table 7 (similar suggestions of variables see for instance Sander, 2007: 14, German SOEP).

Table 7: Descriptive Statistics*

Variables	2007			2009			2011			2013			2015		
	Returnees	Non-movers		Returnees	Non-movers		Returnees	Non-movers		Returnees	Non-movers		Returnees	Non-movers	
	Mean or frequency	Mean or frequency	SD	Mean or frequency	Mean or frequency	SD	Mean or frequency	Mean or frequency	SD	Mean or frequency	Mean or frequency	SD	Mean or frequency	Mean or frequency	SD
Female (dummy)	38.83	52.19	0.499	35.91	51.96	0.5	35.35	51.92	0.5	30.23	51.88	0.5	29.85	51.89	0.5
Age	33.76	37.69	21.63	35.19	39.05	22.05	36.95	40.56	22.34	38.34	42.31	22.5	38.01	43.69	22.71
Secondary education (dummy)	75.25	62.49	0.33	76.32	58.7	0.44	74.84	62.32	0.44	80.07	62.71	0.44	76.18	62.57	0.43
Tertiary education (dummy)	15.9	12.5	0.15	15.96	13.63	0.23	17.94	14.47	0.24	13.46	15.61	0.25	17.29	16.73	0.25
Married (dummy)	50.91	47.96	0.31	54.12	55.68	0.42	54.14	55.32	0.42	57.64	55.26	0.42	58.24	55.19	0.41
Divorced/separated (dummy)	3.22	2.91	0.32	5.12	4.07	0.52	4.88	4.02	0.52	4.82	4.16	0.52	4.4	4.3	0.51
Widowed (dummy)	1.21	8.11	0.13	1.65	9.65	0.2	1.8	10.06	0.2	2.16	10.31	0.2	1.96	10.91	0.2
Single (dummy)	44.67	40.93	0.29	39.12	30.06	0.39	38.75	30.6	0.39	34.55	30.27	0.39	35.24	29.6	0.37
Household size	4.1	3.96	1.82	3.83	3.76	1.77	4.2	4.01	1.89	4.26	4.04	1.95	3.91	3.65	1.88
Self-employed (dummy)	11.07	1.34	0.12	9.19	2.92	0.17	9.45	3.03	0.17	11.3	3.08	0.17	10.28	2.86	0.17
Entrepreneur (dummy)	1.41	0.28	0.05	1.39	0.52	0.07	1.27	0.55	0.07	0.83	0.5	0.07	1.79	0.47	0.07
Started own business last year (dummy)	2.82	0.36	0.06	3.04	0.65	0.08	4.25	0.67	0.08	2.16	0.61	0.08	2.61	0.52	0.07
Invested in productive activity last year (dummy)	8.19	5.25	0.23	6.78	4.66	0.21	7.09	4.18	0.2	6.02	3.9	0.19	5.35	3.48	0.18
Number of observations	0.66	99.34	0.08	1.53	98.47	0.12	1.25	98.75	0.11	0.8	99.2	0.09	0.81	99.19	0.09
Total number of observations (households)	5532			12381			12381			12352			11740		
Total number of individuals	17406			31967			32179			31560			29372		

*SD here refers to the statistical term of standard deviation and not Social Diagnosis (Diagnoza Społeczna)

Accordingly, returnees constitute between 0.6 to 1.53 percent of the sample across all 5 waves, whereas the sample size ranges between 17.4 thousand to 32.1 thousand individuals per wave. For 2007 there is the lowest number in observation while in 2009 and 2011 significant more observations and in 2013 and 2015 rather moderate observations are counted, which is in line with the expectations, as the massive migration from Poland started with the EU accession in 2004 and the significant magnitude of returns has been observed only after 2 to 3 years upon the departure of first migrants. In the sample, the returnee is predominately male. Compared to non-migrants, the returnee is younger and more often secondary and tertiary educated than the ones with basic education. The returnee is also more often married and comes from a household which in average consist of 4 persons.

When it comes to most relevant characteristics from perspective of this dissertation, **the returnee is significantly more often self-employed** than non-migrants. This is also visible for the status of

entrepreneur; however, **self-employment dominates over an activity of an entrepreneur**. On average, the returnee more frequently opened a business in the last year compared to non-migrants and also invested more into productive activity than non-migrants.

5.5 Description of the econometric model

Econometric models are constructed from economic data with the support of techniques of statistical inference (Wooldridge, 2013). These then provide empirical content to economic relationships (Baltagi, 2011), e. g., the impact of return migration on economic development of a home country via choosing entrepreneurship upon return. The models also consider underlying mechanisms described by economic theories (e. g., New Economics of Labor Migration - NELM) in relation to optimizing behavior on the individual's side, i.e., a returnee. The respective theoretical base line for interdependencies between international (return) migration behavior, occupational choice and outcome is that households and businesses are mobile and that households make decisions to maximize utility while business are created and operated to maximize profit, each influenced by different internal and external factors (Gebremariam et al., 2007).

To verify research hypotheses, three scenarios (equations) are estimated with statistical methods:

1. Entrepreneurial propensity equation;
2. Entrepreneurial survival analysis;
3. Income (performance) equation.

In what follows, the applicable econometric model is explained and each of the respective equations are described, including the main variables and the statistical methods used.

5.5.1 Development of the econometric models

Mathematical modelling of the magnitude and structure or future outcome of a (population) relationship between a (set of) dependent variable(s) and an independent variable(s) is performed through the statistical method of regression analysis.²⁰ The researcher can determine what

²⁰ The term Regression goes back to F. Galton (1822 – 1911) for whom the term regression related to the tendency of extreme data values to revert to the overall mean value, i.e., through repeated sampling, a variable that is measured at an initial extreme value the first time tends to be closer to

parameters have what influence and display the impact changes to it may have. If there is an influence, it is possible to predict how likely this circumstance occurs. Generally, the dependent variable is quantitative (continuous, numeric) and has an infinite number of values within given intervals (Wooldridge, 2013). If an unknown probability p of occurrence of a certain circumstance is to be estimated, the dependent variable (outcome) becomes a dichotomous (binary, categorical, fixed) variable that takes on only two values: 1 as yes/ occurrence, or 0 as no/ no occurrence with $y \in (1,0)$ which forms to $p = \text{probability event occurs} / (1 - \text{probability of occurrence})$. The natural log of the ratio of these two odds of the dependent variable then limits the values to be between 0 and 1 (Ibidem). Further, a logistic transformation of the odds (logit) serves as the dependent variable: $\log(\text{odds}(p)) = \text{logit}(p) = \ln(p/(1-p))$ linking the regression equation for the independent variables to form the required model (Hua et al., 2021).

Furthermore, individual human action varies randomly among the population but remains, generally, constant for the particular individual over time. The coefficients (intercept and slope) model the correlation of choices across alternatives individuals have, and therefore consider such heterogeneity in the data. The true value of the slope remains, however, unobserved which is why sample values are calculated and made inferences about. Coefficients represent the given data then on a best fitting line (regression function line, s -line) via the maximum likelihood estimation for random samples, i.e., the parameter values that maximize the likelihood of observing the data (Hsiao, 2003; Strzelecka et al., 2020). To estimate their precision, standard errors are used. These are, however, not always independent and/ or identically distributed.

Specifically, self-selection of an individual into a certain human behavior is to be dealt with when a binary indicator of self-selection might be systematically related to unobserved factors, i.e., the relevant estimator is biased preventing from uncovering the true effect of self-selection and causing the explanatory variable to be endogenous (Wooldridge, 2013). As the actual relationship between the dependent and independent variable is not fully calculable, a residual (error term) then accounts for the difference in observed data to the sample data (Roberts, 2013). As the variations of the outcome are generally unknown but correlated with the independent variable, an assumed

the mean when measured for a second time (regression to mean). The methodology developed to quantify correlation relationships and to fit lines to data values and the term has become associated with the statistical analysis known today as regression analysis (Senn, 2011).

exogeneity of the independent variable and the error term turns into challenge when becoming endogenous. Consequently, variables may become lagged by one or more periods as past values are subject to the same problem (Salvatore, 1977).

To deal with unobserved bias, dummy variables are defined to distinguish between groups with their differences estimated via coefficient estimation on them, though relative to the base group (Wooldridge, 2013). In order to interpret a one-unit increase in the value of the independent variable more qualitatively, the model accounts for interaction between the dummy variables to allow slope differences across different groups (Ibidem). The introduction of dummy variables allows to control for additive and time-invariant effects (Mayda, 2005).

Time-invariant variables (e.g., gender, education etc.) then play a role as explanatory variables, with or without influence on the independent variables. However, some may not be available and thus lead to bias. To include their effect on the outcome, fixed-effect models and/ or random effect models with robust standard errors are estimated to address heteroscedasticity. Random effect models are preferably used to include time-invariant variables because in fixed effect models, these are taken in by the intercept (Bartels, 2008). Also, fixed effect models do not account for developments over time but only per each period and how this differs from the base period (Wooldridge, 2013). Whether or not there is a correlation between the individual characteristics and the independent variables is, at the end, established via specific tests, e.g., the Hausman specification test (Torres-Reyna, 2007). In general, if the p-value is significant ($p < 0.05$) then fixed effects models are preferred, if not then random effects models. The problematic issue with these types of models is that in fixed effects models the application of time invariant variables (e.g., geographical location, gender, etc.) is not possible. Therefore, the explanatory power of these models might not be fully satisfactory, despite statistical correctness.

Furthermore, information (data) for individuals in the same cluster may correlate while for individuals in different clusters may not correlate. There needs to be a clustering at the highest level (Cameron and Miller, 2015).

Finally, to determine whether the relationship between the dependent variable and each term in the model is statistically significant, the p-value for the term to the estimated significance level needs

to be compared to assess the null hypothesis, which is that there is no association between the term and the response. Usually, a significance level of 0.05 is deceive indicating a 5 per cent risk of concluding that an association exists when there is no actual association. If the p-value is less than or equal to significance level, there is a statistically significant association between the dependent variable and the term, otherwise not. The model fits when the coefficients are significant at a better than 0.001 level and exceed standard error.

Together, the parameters of a respective binominal logit **regression model** are as follows (based on Stoltzfus, 2011; Peng et al., 2002; Stein and Bakalarczyk, 2010):

- $Y_{i,j,t}$ = dependent (binary response) variable(s) to be explained (e. g., taking up entrepreneurship) with its (endogenous) value depending on the parameters of following components
- $X_{i,j,t}$ = independent (predictor, regressor) variable(s) that explain the value of $Y_{i,j,t}$; based on a set of individual and household units and times t, including (interacting) dummy variables
- β_0 = constant (linear, mean) parameter (y-intercept, random, bias); e.g., non-migrants who exist among the population and undertake entrepreneurial activities
- $\beta_{1..k}$ = (linear, mean) slope (random regression coefficient) of X; it determines the sensitivity of Y on one unit change in value of X when unequal zero (otherwise no relationship)
- ε = constant, regression residual; essential error term for displaying variation of observations around the regression line; absorbs other factors that are not included in X or the model

into the base model:

$$Y_{ijt} = \text{logitP}(Y = 1) = \log\left(\frac{p}{1-p}\right) = \beta_0 + \beta_1 X_{ijt} + \beta_2 X_{ijt} + \beta_k X_{ijt} + \varepsilon_{ijt}$$

Regularly, such econometrics models are estimated with specialized software programs such as STATA (Stein and Bekalarczyk, 2010). It is possible to estimate whether the event of interest did or did not occur at each discrete time point (e.g., choice into business) while other models may estimate the unit (returnee) experiencing an event (e. g., failure of survival) at any given point within the study period (De Champlin, 2010).

5.5.2 Description of the three scenarios (equations)

In what follows is the derivation of the equations that relevant for the analysis of entrepreneurial propensity, firm performance and survival.

A. *Entrepreneurial propensity equation*

In the first equation, the inclination of individuals to engage in entrepreneurial activities in Poland is examined. Specifically, individuals who have not migrated (non-movers) are compared to returnees. The equation includes individual entrepreneurial propensity as the dependent variable and a set of independent variables and controls (i.e., age, education etc.). The dependent variable represents individual entrepreneurial propensity as a dummy (with values 1 for entrepreneurs and 0 otherwise). The logistic regression for panel data with random effects is used to capture the importance of time-invariant variables, i.e., gender. Consistent with hypothesis (H1), it is anticipated that returnees will display a higher level of entrepreneurship compared to non-migrants, assuming all other factors remain constant (*ceteris paribus*). Consequently, a panel approach is applied to estimate the impact of return migration on the dependent variables, as outlined below:

$$Entrepreneurship_{ijt} = \beta_0 + \beta_1 ReturnMigration_{ijt} + \beta_2 X_{ijt} + \varepsilon_{ijt}$$

Entrepreneurship entails the set of the dependent variables for an individual i , in household j , at time t , measuring the entrepreneurial propensity including: self-employment status of an individual (*self-employment* dummy) and entrepreneurial status (i.e., person works on own account, but also employs other people – *entrepreneur* - dummy), but also variables: *open business* and *investment*. Both of these are dummies: open business takes value 1 when individual declares to have opened business in the last year (and 0 otherwise), while investment takes value 1 if individual declares to have invested in production, trade or service activities in last 12 months (and 0 otherwise).

The main independent variable is return migration which is a dummy and takes the value of 1 if the individual has returned from international migration in the previous 2 years, and 0 otherwise. Also lagged dummies for return are included, i.e., return in the previous wave (3 to 4 years before

the survey) and return 2 waves ago (5 to 6 years before the survey), to capture long-term effects of return migration on the economic activity of an individual. A set of controls is included in the vector X_{ijt} (matrix notation): The marital status of an individual, gender, age, educational level (secondary and tertiary), or the household size are included. As some of these variables are time-invariant, the random-effects logistic regression for panel data is applied.

B. Entrepreneurial survival rate

In the second step, a survival analysis is performed which allows to investigate the survival rate of the individual entrepreneurial activity. In this aspect, reference is made to survival models which concern failure time analysis or time-to-event outcomes (Katchova, 2013). In survival data analysis, multiple observations on the same individual (i.e. the self-employed or the entrepreneur) are gathered due to continuous monitoring of them over a specific time frame, spanning from the initiation of risk until the occurrence of an event (e.g., failure). The interest is in how long they stay in the sample (survival) and what is the failure (hazard rate) (Ibidem). The initiation of risk is the start of entrepreneurial activity – either the self-employment status of an individual (self-employment dummy) and entrepreneurial status (i.e., a person works on own account, but also employs other people – entrepreneur - dummy). Survival analysis then analyses the hazard of a failure to occur. Here, failure is the end of the business activity and set as the dependent variable. Such failure is reported when – at some point of measurement in time – the individual ceases to exhibit entrepreneurial activity. As a result, in survival analysis only those individuals are included who are exposed to the risk of failure of a business activity, i.e., who have ever in the available dataset been marked as those who performed entrepreneurial activities (either as self-employed or as entrepreneurs). However, when applying such model, the number of observations decreases.

Consistent with hypothesis (H2), it is expected that enterprises started by returnees have higher survival rates than enterprises started by individuals without migration experience. In order to verify this hypothesis, a survival analysis mode is run. Consequently, the applied model estimates the impact of return migration on the failure risk for entrepreneurial activity:

$$Failure\ Entrepreneurship_{it} = \beta_0 + \beta_1 ReturnMigration_{it-1} + \beta_2 X_{it} + \varepsilon_{ijt}$$

where *Failure Entrepreneurship* is a time-to-event outcome for an individual i , when a transition from entrepreneurial status from 1 to 0 (i.e., failure) occurs, i.e., each failure is a transition from value 1 to value 0. STATA offers different regression models on survival data and one of them is the random-effects Weibull proportional hazard regression (STATA, 2023; Sohn et al., 2007; Wienke and Kuss, 2009). It is useful for modelling survival rates at any given point within the study period and it displays decreasing, increasing or constant risk (De Champlain, 2010). The main potential predictor of an entrepreneurial failure is a return migration status of an individual (lagged, - return migration in previous waves, dummy). A set of controls is included in the vector X_{ijt} . The marital status of an individual, gender, age, educational level etc. are included.

Complementarily, and to reinforce results, the survival rate of the individual entrepreneurial activity is suggested to be investigated by comparing non-movers to returnees whether they are able to sustain entrepreneurial activity over time. The panel approach to estimate the impact of return migration on the dependent variables could be applied as follows:

$$Entrepreneurship_{ijt} = \beta_0 + \beta_1 ReturnMigration_{ijt-1} * Businessman_{ijt-1} + \beta_2 X_{ijt} + \varepsilon_{ijt}$$

Entrepreneurship is then the set of the dependent variables for an individual i , in household j , at time t , measuring the current entrepreneurial status of an individual including: self-employment status (*self-employment* dummy) and entrepreneurial status (i.e., person works on own account, but also employs other people – *entrepreneur* - dummy). The main independent, interacted variables are return migration (lagged, - return migration in previous waves, dummy) and businessman status, which takes a value 1 when individual had entrepreneurial or self-employed status in the previous wave, and 0 otherwise. Finally, a set of controls is included in the vector X_{ijt} : The marital status of an individual, gender, age, educational level (secondary and tertiary), or the household size are included. As in the first equation, as some of these independent variables are time-invariant, the random-effects logistic regression for panel data is applied.

C. Income (Performance)

In the third and the last equation, the entrepreneurial performance of individual economic activity is investigated. In line with hypothesis (H3), returnee entrepreneurs are expected to attain higher

income than non-movers. Consequently, a panel approach to estimate the impact of return migration on our dependent variables is applied, as outlined below:

*Economic performance*_{ijt}

$$= \beta_0 + \beta_1 \text{ReturnMigration}_{ijt} * \text{Entrepreneurship}_{ijt} + \beta_2 X_{ijt} + \varepsilon_{ijt}$$

Respectively, the dependent variable is measured either by logarithm of income of an individual (ln of average monthly personal income in the last 3 months, continuous variable) or by the lost money while doing business (*lostmoney_business*, dummy), which takes a value 1 when individual declared to have lost a lot of money while doing business in the last year. Consequently, two measures of economic success/failure appear: the objective one as measured by personal income and a more subjective one, based on a self-assessment of an individual. As for the main independent variables, an interaction of return migration (in the current, and past waves) and the entrepreneurship status (measured both by self-employment and entrepreneur dummies) are performed. Finally, a set of controls is included in the vector X_{ijt} : The marital status of an individual, gender, age, years of the education pursued by an individual, or the household size is included. As performance of enterprises can also depend on the location of firm, a number of controls for geographical location are included, such as: dummies for cities and their size (number of population), regional mean GDP per capita and Eastern Poland dummy. As most of the controls are time-invariant, the random-effects logistic regression and random effects models for panel data is applied.

5.6 Results of the empirical analysis

This next section provides for the deep analysis of the results derived from the models run, followed by a discussion of the findings. Returnees are compared to non-movers.

5.6.1 Data analytics

A. Entrepreneurial propensity

The results of empirical analysis for entrepreneurial propensity equation are displayed in table 8.

Table 8: Entrepreneurial propensity equation

Variables	Model 1				Model 1a			
	Dependent variable				Dependent variable			
	self-employment	Entrepreneur	open business	Investment	self-employment	entrepreneur	open business	investment
<i>Personal characteristics</i>								
age (continuous)	0.00218 (0.00205)	-0.0241*** (0.0044)	-0.0314*** (0.00229)	-0.0477*** (0.0022)	0.00202 (0.00205)	-0.0243*** (0.00441)	-0.0313*** (0.00229)	-0.0477*** (0.00221)
gender (reference: male)	-1.301*** (0.0587)	-1.850*** (0.123)	-0.395*** (0.0547)	-1.056*** (0.0525)	-1.301*** (0.0586)	-1.855*** (0.123)	-0.394*** (0.0547)	-1.057*** (0.0525)
Secondary education (reference: basic)	1.849*** (0.0853)	3.965*** (0.281)	2.257*** (0.108)	1.014*** (0.0957)	1.846*** (0.0852)	3.971*** (0.281)	2.253*** (0.108)	1.014*** (0.0956)
Tertiary education (reference: basic)	1.520*** (0.106)	5.064*** (0.297)	3.145*** (0.117)	1.864*** (0.107)	1.518*** (0.106)	5.069*** (0.297)	3.143*** (0.117)	1.864*** (0.107)
Household size (number of persons)	0.273*** (0.015)	-0.0683* (0.0352)	-0.123*** (0.018)	0.0280* (0.0149)	0.273*** (0.015)	-0.0687* (0.0352)	-0.122*** (0.018)	0.0281* (0.0149)
Married (reference: single)	2.682*** (0.0941)	3.334*** (0.225)	0.818*** (0.0754)	1.607*** (0.0724)	2.680*** (0.0938)	3.338*** (0.225)	0.817*** (0.0754)	1.607*** (0.0724)
Divorced or separated (reference: single)	0.420*** (0.0407)	0.704*** (0.0816)	0.302*** (0.0323)	0.264*** (0.0349)	0.420*** (0.0406)	0.705*** (0.0816)	0.302*** (0.0323)	0.264*** (0.0349)
Widowed (reference: single)	1.134*** (0.165)	1.175** (0.457)	0.119 (0.19)	0.383** (0.177)	1.134*** (0.165)	1.180*** (0.458)	0.116 (0.19)	0.383** (0.177)
<i>Migration status</i>								
Return migration in current wave (last 2 ys)					0.435*** (0.11)	-0.239 (0.249)	0.495*** (0.118)	0.137 (0.11)
Return migration in previous wave (up to 4 ys)					0.343** (0.135)	0.137 (0.298)	-0.0123 (0.182)	0.168 (0.148)
Return migration 2 waves before (up to 6 ys)					0.537*** (0.164)	-0.112 (0.39)	0.3 (0.225)	-0.0565 (0.201)
return migrant (combined for all waves)	0.562*** (0.109)	-0.0221 (0.238)	0.397*** (0.105)	0.185* (0.101)				
Constant	-10.72*** (0.187)	-15.49*** (0.437)	-6.422*** (0.166)	-4.741*** (0.166)	-10.70*** (0.185)	-15.49*** (0.437)	-6.424*** (0.167)	-4.737*** (0.166)
Observations	171,330	171,330	171,330	113,137	171,330	171,330	171,330	113,137

Random effect logit model with robust standard errors clustered at household level. Standard errors in parentheses. *** p<0.01, ** p<0.05, * p<0.1

In the analysis, as for the controls the following picture arises:

- Age of the surveyed individuals turned to be negatively associated with all measures of entrepreneurship, except for self-employment status.
 - This is an interesting finding as in most studies the status entrepreneurship is positively associated with age as usually more experienced individuals become business owners.
- Gender turned to be negatively associated with all measures of entrepreneurship
 - Most of the returnees are male;
 - Also in line with most studies on entrepreneurship, this implies that females are less inclined to entrepreneurship than males.
- Education turned to be positively associated with all measures of entrepreneurship:

- Both secondary educated and tertiary educated individuals are more likely to become entrepreneurs as compared to the ones with lower education – this effect is consistent for all measures of entrepreneurship and in all model specifications;
- With respect to self-employment, secondary educated individuals are more inclined to choose self-employment than tertiary educated individuals. This effect could be possibly explained by the higher likelihood of getting into (more gainful) wage employment by tertiary educated individuals;
- Yet, for all other measures of entrepreneurship (entrepreneur, open a business, investment) the tertiary educated individuals are more likely than secondary educated to choose entrepreneurship;
- Household size is linked with entrepreneurship in a diversified way: in the case of self-employment and investment measures, the effect is positive and significant (although for investment only at $p < 0.1$) while for entrepreneur and open business outcomes the parameter becomes negative and significant at 1%.
- The most decisive factors on the dependent variable by order of value are:
 - For individuals who choose self-employment: family status (married), secondary education, tertiary education, family status (widowed), family status (divorced/ separated), household size, gender; age no influence;
 - For individuals who choose entrepreneurship: tertiary education, secondary education, family status (married), family status (divorces/ separated), family status (widowed), gender, age, household size;
 - Individuals who open a business: tertiary education, secondary education, family status (married), family status (divorced/ separated), gender, age;
 - Individuals who invest: tertiary education, family status (married), secondary education, family status (divorced/ separated), family status (widowed), household size, gender, age;
 - This means for model 1: **higher education and family status (married) are the main influencing variables on the dependent variable** more positively while gender or age are influencing negatively.

As for the main independent variable, in the basic model specification model 1, the return migration status of an individual is measured and included in all waves, irrespectively whether someone has returned in the current wave of the survey, or 4 and even 6 years before. Apparently, **individuals who have experienced international migration and have returned to Poland are more likely to become self-employed and they are more likely to open a business – this effect is strong and significant** at $p < 1\%$ level. These individuals are also more likely than non-migrants **to become investors**, although in this case the effect is weaker and significant at 10% level. Yet, the effect of return migration on entrepreneurship measure is not visible: in such model specification, the sign of the parameter is negative and insignificant.

In the model 1a, the “fresh” effect of return migration of an individual is considered, i.e., whether the homecoming occurred in the current wave, previous wave or even 2 waves ago, i.e., up to 6 years prior to the moment of surveying. **The results are quite similar**: the returnees are more likely to be self-employed than non-migrants and this effect is quite consistent for all the waves:

- Becoming self-employed occurs more likely 2 years upon arrival, then slightly more after 6 years upon arrival; the lowest value occurs after 4 years upon arrival;
- Choosing entrepreneurship occurs after 4 years upon arrival but not after 2 or 6 years upon arrival (negative association).

When it comes to the other dimension of entrepreneurial activity, the results are more nuanced:

- Returnees are more likely to open a new business, i.e., in the first 2 years upon arrival;
- **With regards to status entrepreneur and investment, return migration seems not to be significant in this regard**, which means that persons with former international migration experience do not differ from non-moving individuals in this aspect.

As for the controls there is the same result as in model 1. All values of the controls are either the same or very similar in their value and therefore with the same influence on the dependent variable.

B. Entrepreneurial propensity after including reason for returning and duration of migration

The following model 2 includes the same set of controls but when it comes to main independent variables, it is operationalized differently. In the questionnaire, returnees could indicate the reason of their homecoming (only one choice), and those motives were then classified according to classical typology of Cerase (1974) as return of failure, successful return (proxy to return of innovation), and return to other reasons. Obviously, return of failure is negatively associated with entrepreneur status and investment, while successful return is positively linked to opening a business. This model, despite limited information on return motivations clearly shows that the **returnees** constitute in fact a **heterogenous population**, and that the quality of their migration experience matters for future economic integration in home country, including entrepreneurial activity.

As such, alternative specifications with a different set of independent variables measuring return migration are explored, namely dummy variables for different types of return (model 2) and the time component duration of migration experience (model 2a). The results of this analysis are provided in table 8a.

Table 8a: Entrepreneurial propensity (additional specifications)

Variables	Model 2				Model 2a			
	Dependent variable				Dependent variable			
	self-employment	entrepreneur	open business	investment	self-employment	entrepreneur	open business	investment
<i>Personal characteristics</i>								
age (continuous)	0.00165 (0.00204)	-0.0245*** (0.0044)	-0.0316*** (0.00229)	-0.0481*** (0.0022)	0.00173 (0.00205)	-0.0244*** (0.0044)	-0.0315*** (0.0023)	-0.0480*** (0.0022)
gender (reference: male)	-1.320*** (0.0586)	-1.862*** (0.122)	-0.405*** (0.0546)	-1.066*** (0.0524)	-1.311*** (0.0586)	-1.847*** (0.123)	-0.395*** (0.0548)	-1.067*** (0.0525)
Secondary education (reference: basic)	1.861*** (0.0852)	3.980*** (0.281)	2.270*** (0.108)	1.016*** (0.0957)	1.855*** (0.0852)	3.967*** (0.281)	2.258*** (0.108)	1.012*** (0.0956)
Tertiary education (reference: basic)	1.529*** (0.106)	5.077*** (0.298)	3.158*** (0.117)	1.863*** (0.107)	1.528*** (0.106)	5.058*** (0.297)	3.151*** (0.117)	1.859*** (0.107)
Household size (number of persons)	0.274*** (0.015)	-0.0698** (0.0353)	-0.122*** (0.018)	0.0273* (0.0149)	0.274*** (0.015)	-0.0667* (0.0352)	-0.123*** (0.0181)	0.0281* (0.0149)
Married (reference: single)	2.690*** (0.094)	3.345*** (0.225)	0.820*** (0.0754)	1.613*** (0.0724)	2.687*** (0.0939)	3.329*** (0.225)	0.822*** (0.0757)	1.614*** (0.0725)
Divorced or separated (reference: single)	0.425*** (0.0407)	0.708*** (0.0816)	0.304*** (0.0323)	0.267*** (0.0349)	0.424*** (0.0406)	0.705*** (0.0816)	0.301*** (0.0324)	0.268*** (0.0349)
Widowed (reference: single)	1.144*** (0.165)	1.190*** (0.457)	0.12 (0.19)	0.390** (0.177)	1.144*** (0.165)	1.180*** (0.457)	0.123 (0.19)	0.397** (0.177)
<i>Migration status</i>								
Return of failure (dummy)	-0.101 (0.34)	-3.127* (1.642)	0.435 (0.362)	-0.988** (0.464)				
Successful return (dummy)	0.644* (0.348)	-0.624 (0.893)	0.609* (0.367)	0.257 (0.362)				
Return migration (other reasons, dummy)	-0.647** (0.322)	-1.915* (1.103)	0.630** (0.308)	-0.268 (0.338)				
Duration of migration (return migrants, months)					0.0185** (0.00814)	-0.0145 (0.0179)	0.0346*** (0.00854)	-0.00018 (0.00886)
Constant	-10.67*** (0.185)	-15.49*** (0.436)	-6.403*** (0.166)	-4.713*** (0.165)	-10.69*** (0.185)	-15.48*** (0.436)	-6.418*** (0.167)	-4.718*** (0.165)
Observations	171,330	171,330	171,330	113,137	171,096	171,096	171,096	112,947

Random effect logit model with robust standard errors clustered at household level. Standard errors in parentheses. *** p<0.01, ** p<0.05, * p<0.1

In model 2, it becomes obvious that the type of return as declared by a returnee matters for the entrepreneurial decision (model 2). **Those individuals who declared that their migration experience was successful** (dummy variable: successful return) **are more likely to become self-employed and to open a business** as compared to non-migrants. Specifically,

- Returnees choose self-employment in the case of return for success;
- Entrepreneurial status is negatively associated with return of failure or for other reasons;
- Returnees are inclined to open a business when reporting successful return or for other reasons;
- Returnees who report failure are strongly and significantly averse to invest.

Consequently, those individuals who claimed that their return was caused by failure of their migration project, for instance due to losing a job abroad (dummy variable: return of failure) are – in line with expectations – less likely to become entrepreneurs or investors. They also become less likely self-employed. Unfortunately, due to limited information on the reasons for return (e.g.: in the pre-defined responses in the questionnaire there are no responses which can be attributed to

return of conservatism nor return of retirement categories) it is not possible to fully explore such circumstances. Respective analyses could be performed only with a richer dataset.

The most important category of former migrants are those returnees who returned for other, not specified reasons (most often: personal ones, like family matters). In this case, the self-employment or entrepreneurial status is significantly and negatively linked with return, while – at the same time – these individuals exhibit a higher propensity to open a new business. Again, due to a limited information on the reasons for return it is not possible fully to explore this heterogeneity of migration experiences. Such analyses could be only performed with a richer dataset.

As for the length of migration experience (model 2a), it is observed that both the likelihood of opening a business and the self-employment status are positively linked to the duration of migration experience (in months) while entrepreneurship and investment are not.

As for the controls in these models, the same base variables as in model 1 and 1a have been applied and the values in their measurement for each of the models remain similar.

C. Entrepreneurial survival analysis

For understanding interacting of variables, they are required to get applied to waves within the panel data. As described above, the analysis includes restricted waves of SD surveys carried out in 2007, 2009, 2011, 2013 and 2015. Respectively, a set of information about each household and individual included in a survey in each specific wave spans over to the time between survey dates, i.e., up to 24 months prior to the moment when a survey is conducted. Several questions from the individual questionnaire ask precisely about the activities of each person up to 12 months before. But most important, the identification strategy of return migrants is problematic, as in many cases the individual responses on migration experience are not provided, and the only source of information about return migration is data from the household survey. Such data includes only a binary information whether a given individual has returned from international migration to a given household between waves of SD survey, i.e., up to 24 months before the household was surveyed. Therefore, a wave 2015 includes the information about migrating and returning individuals in the year

2015 (up to survey date), plus the years 2014 and 2013 since the previous survey date. A previous wave shifts back in time respectively, e.g., wave 2013 spans until the survey 2015 started plus years of 2012 and 2011 and in 2011 the time as of the 2013 survey. This is important to highlight as for the discussion part when the findings will be related to the theoretical, historical, and geographical aspects outlined in the previous chapters.

In what follows, is the investigation of the likelihood of the given individual to remain economically active as an entrepreneur by a) survival analysis and b) a complementary view that compares the entrepreneurial activity in the current sample (t) with entrepreneurial activity in previous waves ($t-1$; $t-2$, $t-3$). This is done to offer different perspectives to the results. Unfortunately, the SD data set does not allow specifically to identify whether the surveyed individual runs the very same establishment as he or she was running in the previous wave of the survey. What is known is only the previous occupation of the individual. Therefore, the previous entrepreneurial status of the individual one, two or even three waves before is operationalized as entrepreneur or self-employed in a past, depending on the dependent variable used (entrepreneur or self-employed).

First, in applying the above describes survival analysis, the sample size reduces, i.e., the number of observations decreases. In case of survival analysis for self-employed status, there is information available on 1,060 individuals and 3,017 observations which implies that on average an individual who was self-employed remained with self-employed status for almost 3 consecutive waves (although there is no certainty whether this is the same type of self-employment between waves). With respect to the self-employed, the following results occur after running survival analysis for the self-employed returnee in each applicable wave, as shown in table 9.

Table 9: Survival analysis for self-employment

Variables	Self-employed (1)	Self-employed (2)
<i>Personal Characteristics</i>		
Female (dummy)	1.3545** (0.1632)	1.3244** (0.1544)
Secondary education (reference: basic)	0.2308*** (0.0282)	0.2269*** (0.0266)
Tertiary education (reference: basic)	0.2711*** (0.0775)	0.2663*** (0.0742)
return in migration in previous wave (up to 4 ys)	2.0020*** (0.4864)	
return migration 2 waves before (up to 6 years)	0.3202** (0.1431)	
return migration 3 waves before (up to 8 ys)	0.3321** (0.1704)	
return in past waves (pooled)		1.2640 (0.2726)
Constant	0.0106*** (0.0071)	0.01293*** (0.2726)
Observations	3017	3017
Number of groups	1060	1060

Standard errors in parentheses

*** p<0.01, ** p<0.05, * p<0.1

The main results show:

- Being female enhances the hazard to fail as a self-employed.
- Being a secondary and tertiary educated returnee (as compared to the reference group of primary educated) decreases the hazard to fail as a self-employed.
- Returning in previous wave (up to 4 years) is associated with a higher hazard to fail (or stop) self-employment.
- But return in older waves (6 or 8 years ago) is associated with significantly lower hazard to stop self-employment.
- When the joint dummy that pools all returnees together is included in the model, the impact of return becomes insignificant, although all remaining independent variables remain almost unchanged.

When performing the analysis for individuals with entrepreneur status, the sample size decreases quite significantly: there are only 216 entrepreneurs with 419 observations. With respect to the

self-employed, the following results occur after running survival analysis for the self-employed returnee in each applicable wave, as shown in table 10.

Table 10: Survival analysis for entrepreneurship

Variables	Entrepreneur (1)	Entrepreneur (2)
<i>Personal Characteristics</i>		
Age	0.9745 (0.0251)	0.9748 (0.0254)
Female (dummy)	3.1363* (1.8261)	3.0428* (1.7715)
Secondary education (reference: basic)	0.0482*** (0.0511)	0.0569*** (0.0589)
Tertiary education (reference: basic)	0.0924** (0.0996)	0.1024** (0.1077)
Household size (n. persons)	0.9004 (0.1590)	0.8777 (0.1559)
Married (dummy)	10.6019* (13.1043)	12.7862** (15.5256)
return in migration in previous wave (up to 4 ys)	6.9545 (10.2051)	
return migration 2 waves before (up to 6 years)	0.2067 (0.3836)	
return migration 3 waves before (up to 8 ys)	3.2999 (8.5198)	
return in past waves (pooled)		1.8951 (2.0642)
Constant	0.0037*** (0.0072)	0.0033*** (0.0064)
Observations	419	419
Number o groups	216	216

Standard errors in parentheses

*** p<0.01, ** p<0.05, * p<0.1

The main results show that:

- Being female enhances the hazard to fail as an entrepreneur;
- Secondary and tertiary education lowers the hazard of failure, but this effect is small, and even smaller as compared to the self-employed individuals;
- Being married is associated with higher failure hazard;
- There is no significant effect for returnees.

Checking for robustness of the results, the same results appear when setting pooled return dummy, i.e., return in previous wave as shown in table above.

The survival analysis leads, overall, to the result of **no evidence that individuals with former migration experience have higher survival rates for entrepreneurship than non-movers. With respect to the self-employed, there exists limited evidence in this aspect.**

D. Entrepreneurial performance

In the last equation, entrepreneurial performance of individual economic activity of returnees was analyzed, comparing them to non-moving individuals. As outlined above, statistical performance measure for SME, especially the more necessity driven ones, is challenging. However, the available data provides for different opportunities which are offered in Table 11.

In what follows is the analysis of the economic performance of individuals, including returnee entrepreneurs, using two alternative measures. The first one is the natural logarithm of the personal income of the individual (continuous), while the second is a dummy for losing money in the last year while doing business (dummy). While the first measure is more objective, a more subjective measure of economic performance is additionally included as it precisely tackles the outcome of entrepreneurial activity.

Table 11: Performance of returnee business

<i>Variables</i>	<i>Dependent variables</i>			
	ln of personal income	standard errors	lost money last year while doing business	standard errors
<i>Personal characteristics</i>				
Age	-0.000984	(0.000822)	-0.0393***	(0.00268)
gender (reference: male)	-0.210***	(0.0246)	-0.282***	(0.0636)
years of education	-0.0223***	(0.0041)	0.144***	(0.0105)
household size	0.0532***	(0.00746)	-0.0679***	(0.0209)
married (dummy)	0.371***	(0.0254)	0.515***	(0.0767)
<i>Professional status and migration experience</i>				
Entrepreneur (dummy)	0.763***	(0.0928)	3.489***	(0.112)
Return migration in current wave (last 2 ys)	0.512***	(0.0689)	0.826***	(0.164)
Interaction entrepreneur x return	0.256	(0.518)	0.241	(0.461)
Return migration in previous wave (up to 4 ys)	0.144	(0.0917)	-0.237	(0.311)
Interaction entrepreneur x return (up 4 ys)	0.108	(0.729)	0.281	(0.693)
Return migration 2 waves before (up to 6 ys)	-1.283***	(0.115)	0.851***	(0.319)
Interaction entrepreneur x return (up to 6 ys)	0.421	(0.847)	-0.637	(0.875)
self-employed (dummy)	0.0853**	(0.0418)	3.130***	(0.0796)
Interaction self-employed x return	-0.092	(0.199)	0.257	(0.249)
Interaction self-employed x return (up 4 ys)	0.569**	(0.256)	0.154	(0.432)
Interaction self-employed x return (up to 6 ys)	-0.023	(0.3)	-1.016**	(0.502)
lives in city 500,000+	0.733***	(0.0477)	0.526***	(0.11)
lives in city200_500	0.648***	(0.0451)	0.623***	(0.106)
lives in city100_200	0.471***	(0.0496)	0.552***	(0.121)
lives in city20_100 (reference: small towns and rural area)	0.415***	(0.0329)	0.331***	(0.0889)
Lives in Eastern_Poland	-0.211***	(0.0292)	-0.336***	(0.0776)
region mean GDP pc	-0.0575	(0.035)	-0.112	(0.0865)
Constant	5.387***	(0.0915)	-6.390***	(0.251)
Observations (individuals)	90,554		139,758	
Observations (households)	47,111		65,185	

Standard errors in parentheses: *** p<0.01, ** p<0.05, * p<0.1

When it comes to observations regarding personal characteristics (controls),

- Age is statistically insignificant when it comes to personal income, despite the negative sign of parameter, but with getting older, the individual is less likely to lose money while conducting business activity (negative sign and significant at p<1%);

- Gender is negatively tested for both performance indicators:
 - Male individuals earn more as compared to female counterparts;
 - Female individuals exhibit lower risk of losing money when doing business than male counterparts.
- Surprisingly, years of education are negatively linked to economic performance: the more years an individual has studied, the lower is the personal income and – at the same time – higher chance of losing money while conducting business;
- Size of household size increases personal income and lowers the hazard of losing money while doing business;
- Married individuals have on average higher personal income than non-married ones, but at the same time are more exposed to risk of losing money while doing business.

When it comes to the professional status in migration context, the dependent variables develop as follows:

a) Development of personal income

- Being an entrepreneur is for both former movers and non-movers associated with higher income ($p > 0.01$).
- Moreover, **returnees achieve some slightly higher personal income than non-movers, i.e., there is a small premium for migration experience. Yet, this effect is valid for all returnees, including the individuals who do not conduct business activity upon home-coming. As for specifically entrepreneurs with migration experience, their income is not statistically different from other (non-moving) entrepreneurs and from other returnees: this is demonstrated by the fact that** the values of the interacted variables for entrepreneurs are positive but insignificant across all waves.
- Being self-employed is for both former movers and non-movers associated with higher income: this effect is positive and significant ($p > 0.05$), but weaker than in the case of entrepreneur.
 - However, **returnee self-employed achieve a very limited higher personal income than non-movers, i.e., there is a small premium from migration experience over a certain period in the past.** More specifically, the only premium that returnees get while being self-employed is in wave up to 4 years ago with a value

of the interacted variables that is significant at $p > 0.05$. This signalizes, that for “older” returnees the self-employment status could have been an initial successful integration strategy upon homecoming, but the income premium disappears over time spent in Poland.

- Location matters for the size of the personal income: the bigger is the city in which individual lives, the higher is one’s personal income. Additionally, living in the peripheral region of Eastern Poland²¹ is also associated with substantial income penalty.

b) Lost money while doing business

- **When it comes for the second measure, returnees are more likely to lose money on new business activities than non-movers. This effect is relatively strong and visible both for recent returnees (individuals who returned in the last 2 years prior the survey was conducted), and for the old ones (individuals who returned between 4 up to 6 years before the survey). Yet, in this second case an interaction of self-employment and return migration 2 waves ago is negative and significant at $p < 5\%$. This means, that for return migrants who came back to Poland 2 waves ago and decided to pursue self-employment a joint effect (interaction of self-employment and return and the sole return migration status) is negative: self-employment helps not only to attain a better income, but also prevents from bad investments in failed business activities. Yet, such economic success apparently comes at a certain price: the successful returnees are apparently very conservative in their economic behaviour and risk-averse, while those who exhibit a more risky and entrepreneurial behaviour are not that successful.**
- Living in a big city or bigger cities is associated with losing money while doing business.
- Living in Eastern Poland is significantly associated with not losing money while doing business.
- Living in a region with mean GDP is significantly associated with not losing money while doing business.

²¹ The Eastern Poland is a macroregion concept developed by Polish authorities for the purpose of regional policy to demarcate the less-developed regions in Poland, comprising Lubelskie, Podkarpackie, Podlaskie, Świętokrzyskie and Warmińsko-Mazurskie voivodeships who benefited and still benefit from special financing from the EU funding, including, the Development of Eastern Poland Program (2007-2013) and Eastern Poland Program (2014-2020). As for 2023, the GDP per capita in these voivodships ranges from 67 to 84 per cent of the national average (GOV.pl 2023; <https://www.gov.pl/web/funds-regional-policy/european-funds-for-eastern-poland---what-will-they-look-like-in-2021-2027>, 30.08.2023).

The performance analysis along with the complementary perspective reflects that in the case of the sample Polish returnees **the return for conservatism seems more common than the return of innovation**, which is reflected in **moderate economic outcomes upon return, especially when it comes to business activity**.

5.6.2 Discussion of the findings

Differentiating characteristics between a Polish entrepreneur who has not migrated abroad, and a Polish returnee entrepreneur are shown in Table 12.

Table 12: Comparison sample persona returnee to non-moved Polish businessman

Persona Polish entrepreneur (see above)	Persona Returnee from analysed SD data set
n/a	Migration experience at least 3 months Mostly to Western EU (UK, Ireland, Germany)
Predominately male	Predominately male
About 38 years old	Younger
Secondary educated	Secondary or tertiary educated
Married, most likely with children	Married, most likely with children
From a household of at least three Risk distribution: paid employment by one partner, self-employment by the other partentr	From a household of four Risk distribution: Male household head migrates, maybe self-employed abroad
Desire for Independence: Running microbusinesses, since 2014 also opportunity driven than necessity driven businesses	Reintegration strategy: Microbusinesses set up upon return More often “other” self-employment than enterprise
	Opened business last year, some small premium
Survival rates between 3 months to 42 months 70 percent failure rate in first or second year Ca. 46 percent do not set up business in fear of failure	Business set up as “parking lot” No long-term survival Limited sustainability
Reliance on external funding	No analysis
Focus on domestic market, local products/ services	No analysis

Source: own elaboration

There is strong evidence which support hypothesis 1, but hypotheses 2 and 3 were negatively tested, or the evidence from the data does not support them. However, there is a novel finding as in contrast to the literature from which hypotheses are derived: **returnees who open a business upon return usually do not stay in business for long and they are not significantly more successful than non-movers.** Despite rather pessimistic findings, these should be valuable for the migration studies, (further) studies on (migrant) entrepreneurship and policy making. The following table summarizes the above findings.

Table 13: Summary of empirical analysis of returnee businesses

	1 st Equation	2 nd Equation	3 rd Equation
Investigation	Entrepreneurial propensity	Survival	Entrepreneurial performance
Dependent Variable, (set of), $Y_{i,j,t}$	Entrepreneurship	Entrepreneurship	Economic Performance
Independent Variable, (set of), $X_{i,j,t}$	Return migration status (1,0)	Failure (1;0) Return migration status (1,0); Businessman status (1,0); Interacted	Return migration status (1,0); Entrepreneurship (1,0); interacted
Applied Controls	age, gender, educational level, household size, migration status, family status, geographies, GDP		
Econometric analysis (performed)	Panel Logistic Regression with random effects	Random-effects Weibull proportional hazard regression Complementary:	Panel Regression with random effects Panel Logistic Regression with random effects
Robustness checks	e. g., reasons for return, migration duration, as for second eq. age sq as for 3 rd not applicable		
Analysis: <i>Decisive variables</i>	Higher education, family status (married), migration status, return migration interacting businessman, geographies (city, population, region, region mean GDP)		

<i>Results</i>	<ul style="list-style-type: none"> • Returnees to Poland are more prone to choose into self-employed and to open a business, preferably in the first 2 years upon arrival as compared to non-migrants. • When it comes to entrepreneur and investment status, there is no significant difference between returnees to non-movers. • Returnees who come back for success are more likely to become self-employed and to open a business as compared to non-migrants. • Returnees who return for failure or other reasons open businesses but do not invest, they also do not declare self-employment or entrepreneurship. • Duration of migration influences positively opening a business and the self-employment status. • Females are less inclined to self-employment or entrepreneurship, as opposed to male. • For the case of self-employment, the effect of secondary education is stronger than tertiary while for the entrepreneur status the tertiary education plays a stronger, more positive role. • The size of the household is positively related to self-employment and negatively linked to entrepreneurship status. • Survival analysis and complementary perspective: <ul style="list-style-type: none"> ○ There is little to no evidence that individuals with former migration experience have higher survival rates for entrepreneurship than non-movers, while there is some limited, yet heterogeneous evidence for self-employment in this aspect. ○ Those who were self-employed in the previous wave and have migration experience, do not continue with their business in current wave. Their business is not sustainable. ○ Those returnees who entered entrepreneurship in the previous wave and tried to continue their business are to some extent slightly more likely to stay in business in the current wave. Yet, the survival of the entrepreneurial activity decreases over time. However, the effect does not necessarily come from migration experience alone. There is no long-term sustainability of their businesses. • Performance: <ul style="list-style-type: none"> ○ Returnees benefit from migration experience in terms of income attained upon return to Poland. ○ Being self-employed or an entrepreneur is for both former movers (returnees) and non-movers associated with higher income, but in fact the migration premium is very small after interaction of the respective variables. ○ Returnees are more likely to lose money on new business activities than non-movers. ○ Years of education are negatively linked to economic performance.
<i>Summary finding</i>	<ul style="list-style-type: none"> • Returnees who open business upon return usually are not staying in business for long and they are not more successful than non-movers. • These findings are rather contrary to literature that proposes entrepreneurial returnees to be “agents of change”.

Source: own elaboration

Answers to the specific research questions and hypothesis can be given as follows:

Table 14: Overview of answers to research questions and hypothesis

Research questions, Hypothesis	Result
<p>Research question 1: To which extent enter return migrants into entrepreneurial activities upon remigration?</p> <p>H1: Return migrants exhibit higher entrepreneurial propensity than individuals without migration experience.</p>	<p>For the sample group, Polish returnee enter more into self-employment, but also into other forms of entrepreneurial activity (opening a business, partially to invest, yet no entrepreneur status).</p> <p>H1: positively tested</p>
<p>Research question 2: In what way do survival rates of enterprises founded by returnees differ from the firms started by non-migrants?</p> <p>H2: Enterprises started by return migrants have higher survival rates than enterprises started by individuals without migration experience.</p>	<p>The rates do not differ but the rate of dropouts from entrepreneurial activity is higher for return migrants.</p> <p>H2: negatively tested</p>
<p>Research question 3: To which extend do these entrepreneurial activities generate a sustained economic growth?</p> <p>H3: Return migrant entrepreneurs attain sustained income than entrepreneurs without migration experience.</p>	<p>The impact of returnee entrepreneurship on the Polish economy is limited due to scope of small business and high returnee business failure risk.</p> <p>H3: negatively tested</p>

Source: own elaboration

5.6.3 Summary of findings

This study confirms evidence that return migrants are more entrepreneurial than non-moving individuals. However, the longitudinal analysis unveils that their survival rates are not different than in case of individuals without migration experience. Moreover, the returnees are exposed to a higher risk of entrepreneurial failure (i.e. measure losing money while doing business). Consequently, the desired return of innovation as labeled by Cerase (1974) in his typology of return migration might not materialize and the entrepreneurial gain from return as advocated in the literature seems over-optimistic in the Polish case at hand. Independently of decreasing emigration and therefore return migration potential (Fihel et al., 2023), these findings should still be beneficial to continuously look for ways to attract and re-integrate the needed critical mass of return migrants more efficiently, especially as they are one source of filling demographic gaps.

Also, the Polish case is important, as migrants that went mostly to EU-destinations and returned to Poland are observed, so the entrepreneurial ecosystem and the legal framework differ not as much between the involved countries, as the North-North migration route is affected, i.e., developed-to-developed economy. This would be different in return cases to countries with distant economic development, for instance Albanians returning from Italy, or Moldovans coming home from France.

6 Conclusions

This study has contributed to the literature on return entrepreneurship in several aspects. First, contrasting to most of the studies that develop upon the North-South migration route, this study concerns the North-North migration route. The Polish economy has experienced a substantial outflow of emigrants mostly to the Western EU member states after 2004. Though this migration wave bears substantial return potential: up to 50% of the post-accession migrants from Poland are estimated to have returned to Poland (Anacka and Fihel, 2016). Consequently, return migration to Poland after 2004 constitute an important return flow between developed destinations and developed origin country, a case which so far has been investigated only to a limited extent (Croitoru, 2020). Second, through the SD data set, the exploitation of a broader set of dimensions of return entrepreneurship compared to previous studies was possible, e.g., ranging from mere self-employment, entrepreneurial status, opening a business up to investment activities. Third, and most important, the SD panel data allowed to analyze economic performance *and* entrepreneurial activity of returnees and non-migrants for five consecutive waves (2007, 2009, 2011, 2013 and 2015).

The appearance of migration for the case of Poland is in line with expectation from selected theoretical aspects: especially with respect to societal transformation, emigration in larger numbers occurred. Over time and due to continued economic improvement in Poland, migration numbers have started to decrease since – among other factors - the wage differential has lowered over time, making the decision into migration even more selective. In order to stratify lifetime utility, migration from Poland initially (in the first decade of 21st century) happened to a great extent due to economic reasons. Most recently, in 2010s, migrants were leaving Poland on more temporal basis,

and in line with household decisions to diversify the sources of income. Return is then the expected event and actually happens when goals are fulfilled, are no longer within reach or reasons have changed from economic to personal reasons (such as family reunion etc.).

From literature, including on CEE and Poland, (e. g., Martin and Radu, 2012; Smoliner et al., 2013; Rokita-Poskart, 2014; Luchyk, 2017; Cieřlik and Dvouletý, 2019; Borjas et al., 2019; Vārpiņa et al., 2023) it is known that returnees do chose self-employment upon return, in many cases deliberately and with long-term intentions while in other cases just to bridge into more gainful or secure wage employment (Brück et al., 2018). Upon return, economic reintegration is therefore key: for the analysis at hand, choosing self-employment is more of a temporary choice in alternative to unemployment or a parking lot, highly likely because the Polish economy now offers more vacancies that remunerate migration experience better (language, cultural knowledge, transnational ties etc.). In both cases, firm death happens in calculated manner for which it is not efficient to heavily invest in additional skills. However, van Stel et al. (2014) point out that in highly developed economies the wish for self-employment may rise again due to desire for self-fulfillment which at some point in the future may apply to Poland in case of further rising economic development.

Also, one should not forget that many emigrants left at young age, with no or limited professional experience from Polish labour market participation. In rough times of the economic transition, there was no one to direct their professional development – while abroad, they on their own matured in their lives and have mastered related uncertainties in foreign capitalist societies which prepared them for a return to a developed (capitalist) home economy (Apsite-Berina et al., 2019: 12). Furthermore, although Poland is experienced in institutionalizing return migration, the post EU accession outflows and respective returns had been specific and therefore, the focus of policy making laid more on caring support to emigrants than to reattract returnees. Therefore, return policy making was more reactive than active (Lesińska, 2013). More so, migration policy making had become politicalized (Matei et al., 2020) with anticipated support programs not implemented (Karolak, 2020) and thus understood as “propaganda” causing disillusion, retarded or no return (Davies, 2011). From this perspective, empirical results may not be as surprising, although the Polish society is said to be very entrepreneurial (Tarnawa, 2020).

Choosing entrepreneurship, moreover, is not the returnee's first choice when entering the business sector upon return, despite that there are returnees who were self-employed abroad (Rokita-Poskart, 2014; Erdal, 2015). However, the more an economy develops the more it may become possible that larger firms again appear, though at the cost of a number of self-employed because the owners have gained confidence in running larger enterprises (van Stel et al., 2014). Additionally, not all returnee entrepreneurs are successful: return for innovation is the minority. Most returns happen for conservatism but some also due to failure of individual's migration project. Moreover, returnee businesses usually do not survive differently to businesses by non-movers, i.e., they show similar high failure rates in the early start-up face and thus lack economic sustainability. One reason might be that migration has not equipped the returnee as much with sufficient skills to run operations on the longer run, i.e., there was no opportunity given or taken abroad to educate systematically on business administration. Cerase (1974) already studied that there might also be resistance by former communities upon returnee innovations (Richmond, 1983).

As such, what remains unclear is then how successful returnee businessman really are, as also only limited case studies on returnee entrepreneurship exist. In the Polish case at hand, the minority of returnees chose into business, and if so, more into self-employment and to some small extend into entrepreneurship. Overall, for the Polish case sample for the years 2007 to 2015, the results indicate that the impact of return migration on entrepreneurship undertaken by the respective Polish returnees is at best modest (and as such in line with previously raised expectation by other scholars such as Kaczmarczyk, 2018: 105). This share of international migration and return migration may not have to its full extent contributed to the desired structural change towards modernization.

Respectively, entrepreneurial returnees are not so much agents of change, they are more agents of contribution to economic development. It correlates with the above described cautious Smithian entrepreneur who with his economic activity contributes to slow but steady economic progress. He is not interested in pure utility maximization. Consequently, these self-employed returnees are not an institution to reduce risk and uncertainty in the economy. Those businessmen that establish business on a longer run may be more of the Knightian or Kirzner's entrepreneurs than Schumpeter's as they use experience and apply knowledge to run a more operational business.

With respect to magnitude of these activities, they do so in dependence of their personal and business environment, like Casson's entrepreneur.

However, this should not mean that working abroad is not contributing to overall home country development (Marks-Bielska et al., 2015; Rootamm-Valter and Herm, 2022). Migration equips returnees with higher standards of living, a broader mind- and skillset, with the potential to reflect internationalization and globalization from a broader perspective (Gittins and Fink, 2015), or with higher expectations for child education beyond the local traditions etc. This, in return, demands different institutional settings to education in form of more foreign language teaching, more effective preparation for children or students to stand the global world after graduating etc. It opens potential to increased workplace attitude towards exploring foreign market when employing intercultural experienced people. As such, returnees influence institutions and thus have influence on societal change, if absorbed. Of course, respective economic measurement remains difficult which then is again difficult to capture statistically to derive effective policies (EU Commission, 2019). Nevertheless, policies should aim to establish a certain number of SME to keep the labour market flexible, including from returnees.

6.1 Limitations to the study

Despite the advantages of using a unique harmonized panel data, the data is limited to a specific country and time span, i.e., Poland between 2007 to 2015, and thus may not allow for many generalizations. The results need to be placed in comparison to similar economies, time spans and country history to fully understand the results. Due to missing reasons on why businesses fail it does not become clear how much the nature of the transition and economic development of Poland may have indeed influenced the findings. What is not recognized in the data is whether or not an individual that had opened one business may have opened another business due to closure of the other one and thus influence businessman rates.

6.2 Outlook and suggestions for further research

Notwithstanding the limitations, the study contributes to filling the outlined gaps in research of the impact of return migration. However, since migration happens for different reasons, returning

populations are different and their returns should therefore be addressed statistically more appropriate per target group and tailored accordingly (Battistella, 2018). With the deep econometric analysis of the available unique panel data, the researcher would be enabled to provide for a representative economic outlook for Polish (labour) remigrants as well as Polish policy makers.

To meet attrition challenges, it may be considered to retreat the available data using for instance latent class framework by which respondents are categorized based on similar response pattern allowing for a more distinct understanding of attrition under given circumstances and thus less bias, i.e., a classification into consistent responding to surveys, infrequently responding or declining/ declined responding etc. (Lugtig, 2014). Furthermore, to meet the challenge in migration context of subsequent migration of households vs. household members, a respective (digital, less costly) survey may limit bias (Fuwa, 2010), especially in return migration context (Sander, 2007). The results of this study might be even more preparing individuals and policy makers in the framework of recent crisis Covid-19 pandemic and other current crisis which might create further waves of returns of diasporans to Poland.

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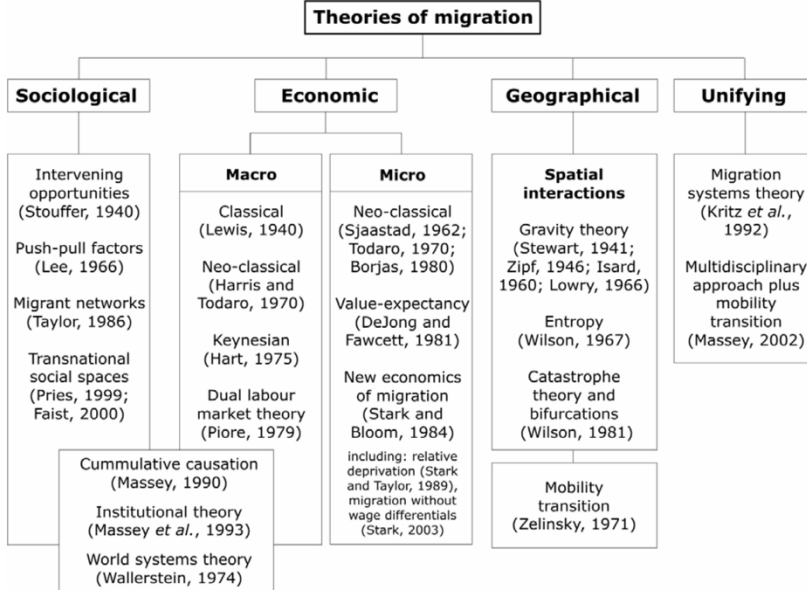
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Appendices

Appendix I: Selected migration theories offered by various disciplines of science

Figure 1. Selected migration theories offered by various disciplines of science



Source: own elaboration, corroborating on Zlotnik (1998) and Kupiszewski (2002b)

Source: Bijak (2006), p. 5.

Appendix II: Proposal on an integrated model of migration theories

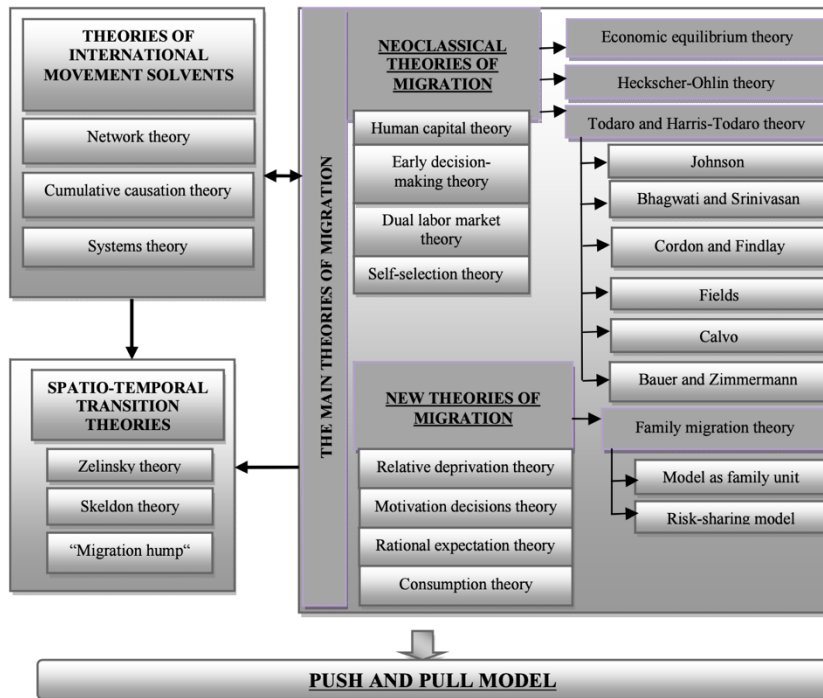


Figure 1. The integrated model of migration theories

Source: Kumpikaite and Zickute (2012), p. 391

Appendix III: Number of East Central European Emigrants living in the EU

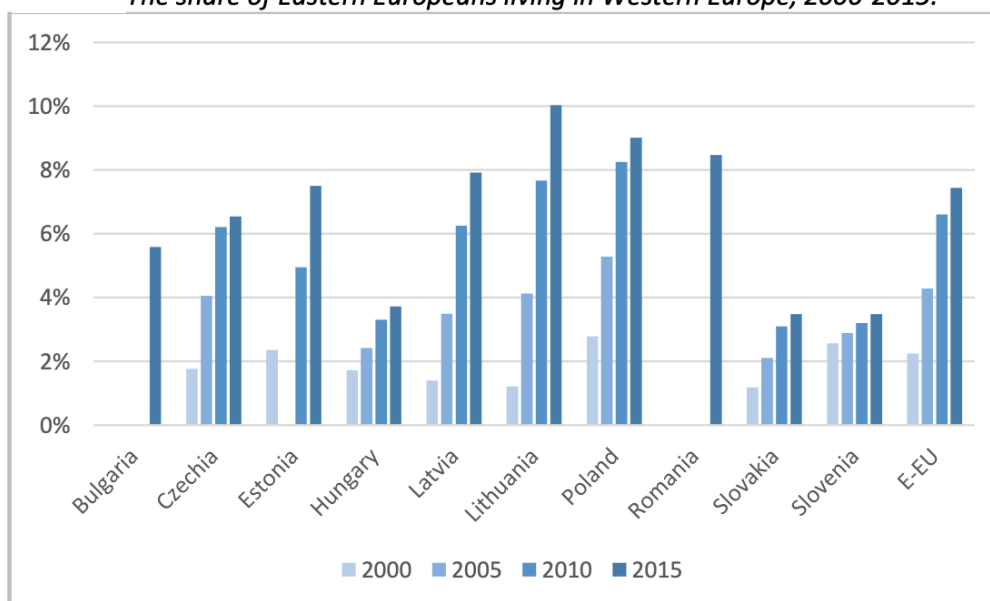
The number of East-Central European emigrants living in the European Union*

Country/Region	2004–2007	2008–2011	2012–2015	2016–2018
Romania	389.2	859.8	1,198.7	1,622.9
Lithuania	172.4	499.7	819.0	1,179.1
Croatia	765.5	564.5	758.8	1,077.8
Bulgaria	231.4	375.5	596.2	1,068.6
Latvia	90.8	194.7	652.7	941.6
Poland	158.1	313.2	472.4	638.9
Estonia	189.5	280.9	436.9	628.3
Slovakia	180.3	251.7	407.2	621.5
Hungary	82.7	104.8	256.5	433.0
Slovenia	161.6	126.6	197.1	298.7
Czech Republic	55.2	60.6	81.0	149.5
East-Central Europe	218.1	385.3	576.5	817.0

Source: Lados and Hegedűs, 2019, p. 155.

Appendix IV: Development of the CEE migrants share in Western EU, 2000 to 2015

The share of Eastern Europeans living in Western Europe, 2000-2015.



Source: UN DESA 'Trends in international migrant stock: migrants by destination and origin' dataset and Eurostat 'Population on 1 January by age group, sex and country of birth' dataset

Source: Vercauteren (2019), p. 10.

Appendix V: Stock of CEE immigrants in Western Europe, by host country, 2015

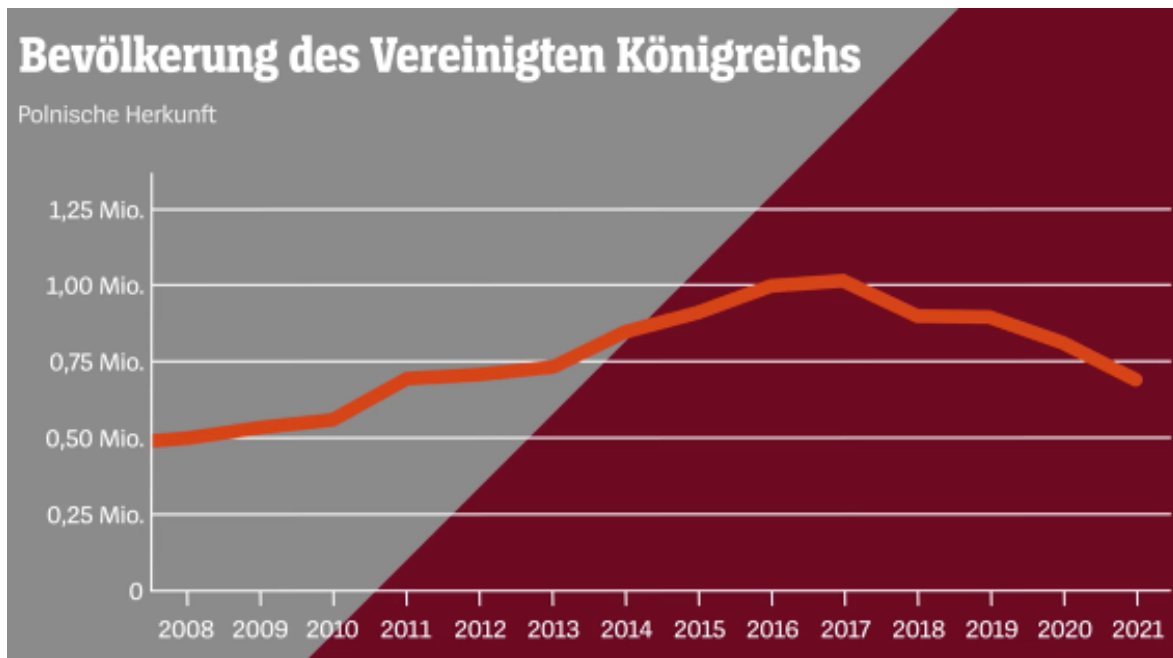
The stocks of Eastern Europeans in the main Western European countries, 2015*

	Bulgaria	Czechia	Estonia	Hungary	Latvia	Lithuania	Poland	Romania	Slovakia	Slovenia	TOTAL
Austria	27 428	13 091	544	77 113	1 545	1 553	62 190	102 270	40 182	18 932	344 848
Belgium	34 797	3 402	1 061	6 611	1 911	2 649	71 178	86 562	6 343	1 188	215 702
Denmark	9 726	1 718	1 413	5 009	5 342	13 495	39 307	27 813	2 919	442	107 184
Finland	2 109	589	51 539	1 907	2 088	1 644	4 284	3 167	518	157	68 002
France	22 970	4 666	932	6 181	1 744	3 039	54 224	118 565	3 838	957	217 116
Germany	290 250	54 764	6 482	190 647	34 123	48 718	758 380	586 594	52 137	27 376	2 049 471
Greece	80 407	904	113	792	319	549	14 982	49 276	769	90	148 201
Iceland	339	506	121	438	1 397	3 362	16 987	1 025	431	49	24 655
Ireland	2 627	5 245	2 373	9 379	21 070	39 276	129 117	28 628	10 416	302	248 433
Italy	59 254	5 666	1 250	8 288	2 913	5 295	95 727	1 190 091	8 568	2 525	1 379 577
Luxembourg	1 596	1 089	620	1 828	711	934	4 489	4 662	882	727	17 538
Netherlands	27 280	3 897	1 279	14 107	4 547	6 680	132 378	20 042	5 699	1 247	217 156
Norway	7 127	1 949	4 926	3 698	11 118	43 680	103 800	14 997	4 053	383	195 731
Portugal	7 033	385	192	597	391	649	1 898	30 750	248	136	42 279
Spain	125 005					17 131	64 642	673 593			880 371
Sweden	6 739	1 662	4 965	7 296	6 234	13 556	53 991	16 885	1 580	909	113 817
Switzerland	9 097	8 144	860	21 302	2 377	2 338	29 304	15 661	15 944	6 541	111 568
United Kingdom	87 421	49 506	10 396	99 596	118 452	201 789	1 033 888	416 092	83 134	5 313	2 105 587

Source: Eurostat 'Population on 1 January by age group, sex and citizenship' dataset

Source: Vercauteren (2019), p. 103.

Appendix VI: Population of Poles in the UK between 2008 to 2021

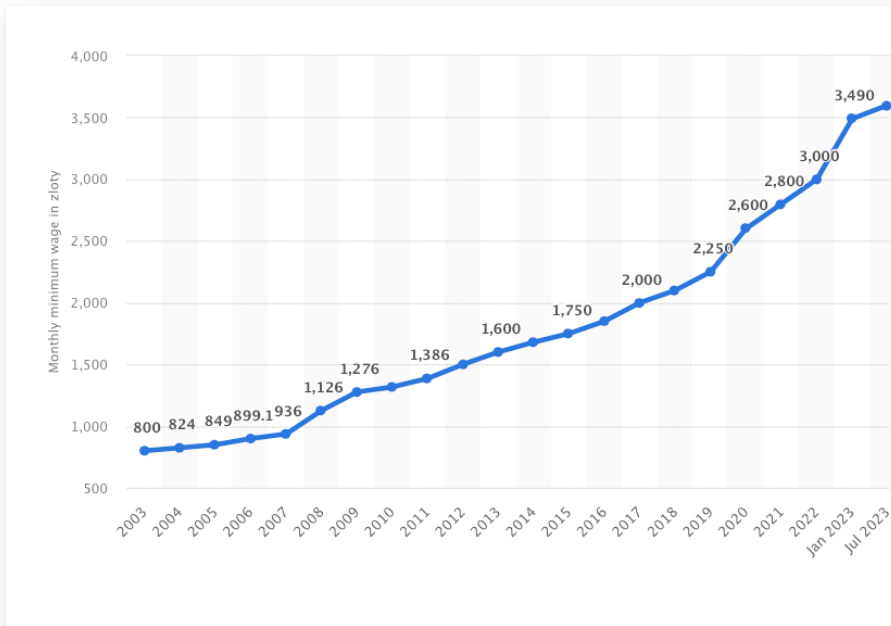


Source: Spiegel Online (2023).

Appendix VII: Monthly minimum gross wage development in PL, 2003 to 2023

Monthly gross minimum wage in Poland from 2003 to 2023

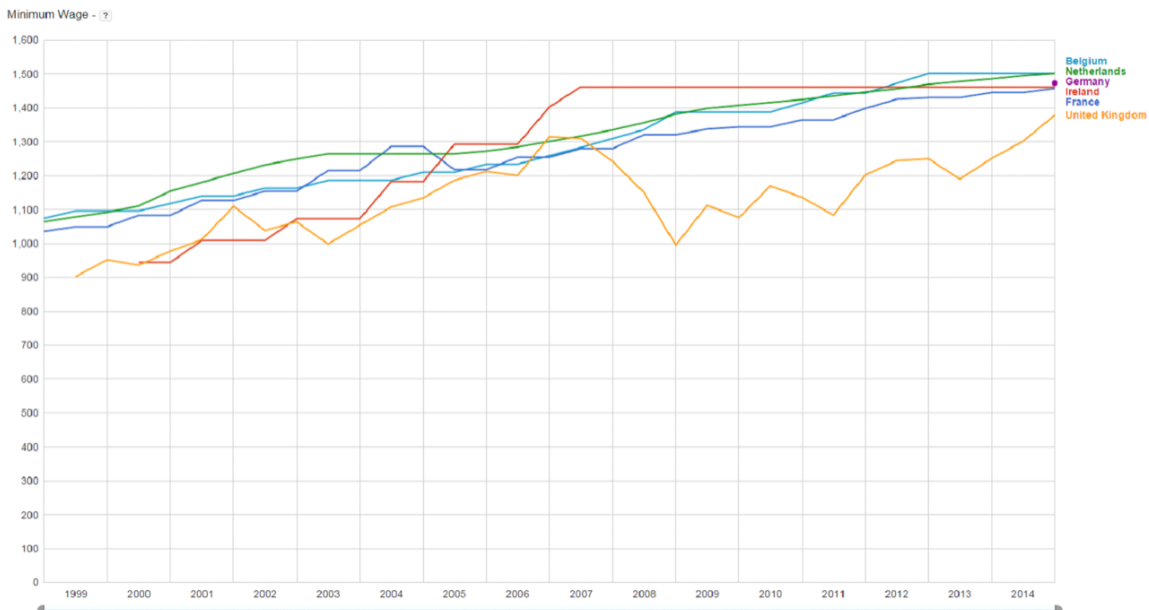
(in zloty)



Source: Statista (2023).

Appendix VIII: Monthly minimum gross wage development in the UK, 1999 to 2014

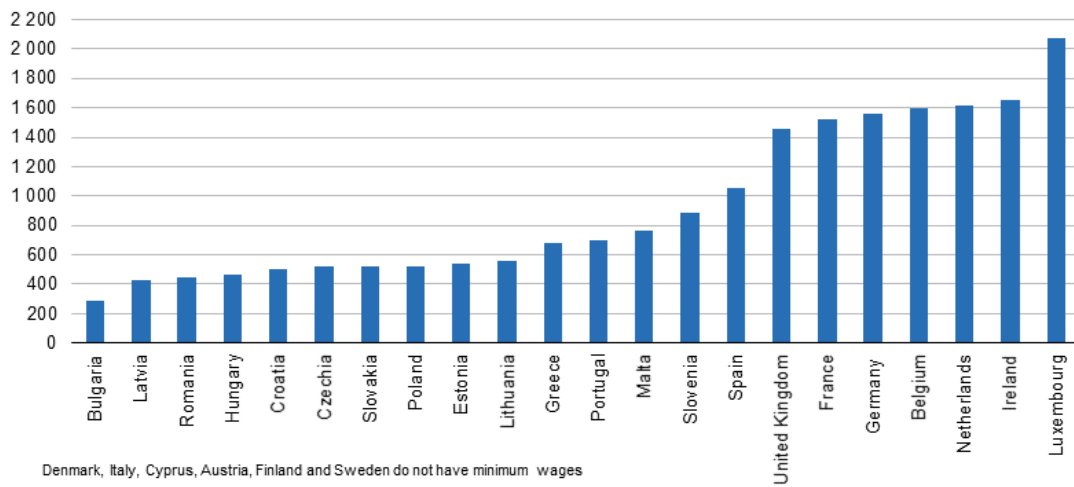
Minimum Wage per Month



Source: UK Commission (2023).

Appendix IX: Monthly minimum gross wage development across EU by 2019

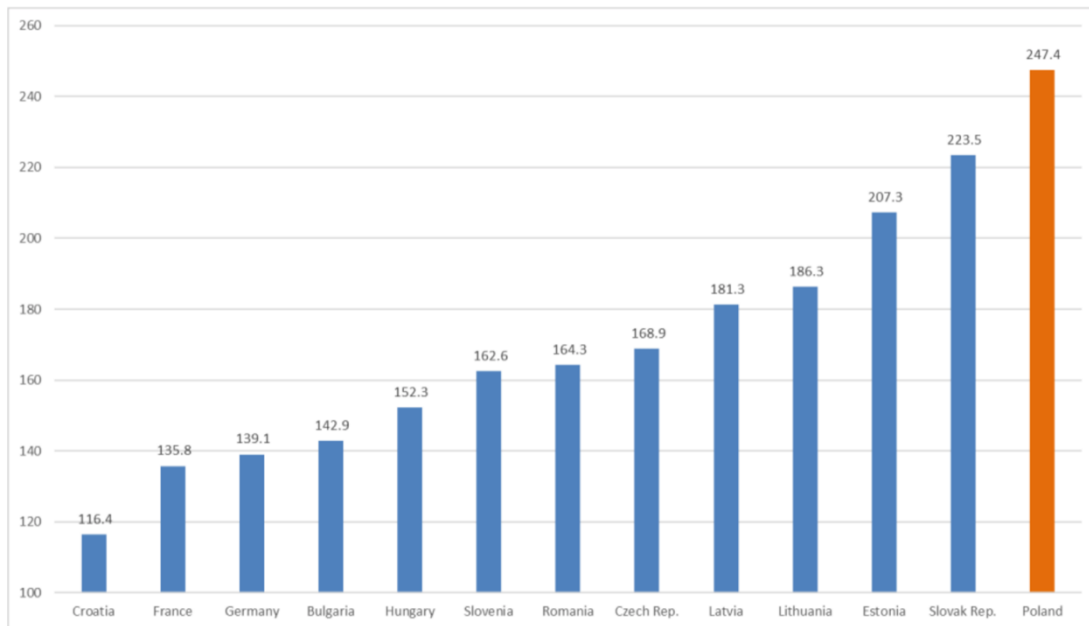
Minimum wages in the EU Member States, as of January 2019, in € per month



ec.europa.eu/eurostat

Source: EU Eurostat (2023a).

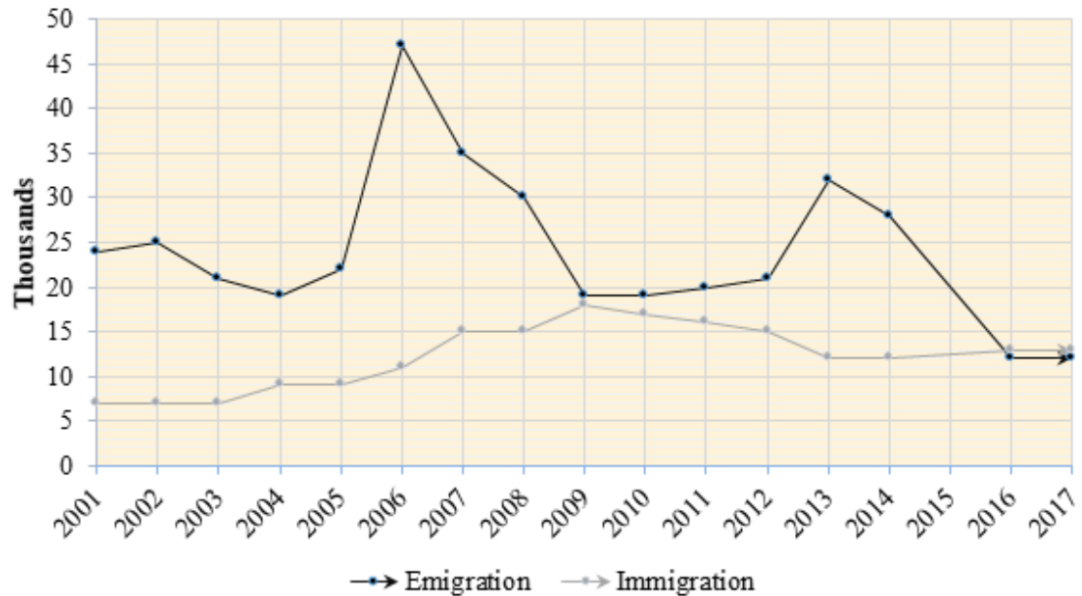
Appendix X: GDP growth per capita, 1990 to 2018, selected EU countries, 1989 = 100



Source: author's own based on the Conference Board Total Economy Database.

Source: Piatkowski (2021), p. 2.

Appendix XI: Emigration from and Immigration to Poland from 2001 to 2017



Emigration from and immigration to Poland, 2001–2017

Source: Own graphic based on data from Central Statistical Office of Poland.

Source: Żołędowski, C. (2020), p. 3.

Appendix XII: Perception of British and German labor market by Poles in 2020

Comparison of the labour market in Poland and the emigration country by Polish migrants in the UK and Germany (excluding respondents without work experience in Poland) (in percentages, N=80)

Where it is easier to:	Poland	Abroad	The same	Hard to say	Total
find the first job	1.3	70.0	20.0	8.8	100.0
remain in work	1.3	43.8	32.5	22.5	100.0
change jobs	2.5	78.8	6.3	12.5	100.0
lose a job	61.3	2.5	17.5	18.8	100.0
work legally	3.8	25.0	35.0	36.3	100.0
make savings	0	97.5	1.3	1.3	100.0
be promoted	16.3	22.5	12.5	48.8	100.0
get a raise	6.3	57.5	10.0	26.3	100.0
reconcile work and private life	35.0	37.5	16.3	11.3	100.0
work according to qualifications	16.3	26.3	30.0	27.5	100.0
get new qualifications	6.3	28.8	11.3	53.8	100.0

Source: analysis of the results obtained in the study.

Source: Żołędowski, C. (2020), p. 6.

Appendix XIII: Website Social Diagnosis 2000 to 2015



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THE COUNCIL FOR SOCIAL MONITORING



Polish version



Social Diagnosis 2000-2013

Objective and Subjective Quality of Life in Poland

The Social Diagnosis is a project to support our diagnostical work with detailed data derived from institutional indicators concerning households and the attitudes, mind-sets and behaviours of their members. It is a diagnosis of the conditions and quality of life of the Poles as they report it. We investigate households and their occupants aged 16 and above using two separate questionnaires.

The project takes into account all the significant aspects of the life of individual households and their members, both the economic (income, material wealth, savings and financing), and the not strictly economic (education, medical care, problem-solving, stress, psychological well-being, lifestyle, pathologies, engagement in the arts and cultural events, use of new communication technologies as well as and many others). In this sense the project is interdisciplinary, drawing on the work of the main authors of the Social Monitoring Council (*Rada Monitoringu Społecznego*) and a team appointed by a Council of experts made up of economists, a demographer, a psychologist, sociologists, an insurance specialist, a health economics expert and statisticians.

As was intended, the Social Diagnosis is based on panel research; we return to the same households every few years, with the first sample being taken in the year 2000. The following took place three years later, and since has been repeated every two years. The reading is always conducted in March to aid the elimination of the seasonal effect. Since 2009 measurement ran into the first half of April due to the size of the sample.

The results of the Social Diagnosis reveal not only the current state of Polish society, but allow us to follow how it has changed over the last ten years. What is more, taking account earlier research on the quality of life in Poland, it even gives us a insight into nearly the entire process of system transformation since 1989.

Sources quoted from this webpage:

SOCIAL DIAGNOSIS, reports; Czapinski J., Panek T. (Ed.) ([year]). Social diagnosis. www.diagnoza.com [exact date of downloading]; questionnaires: Social Monitoring Council ([year]). Social Diagnosis, questionnaires. www.diagnoza.com [exact date of downloading]; results tables: Council for Social Monitoring ([year]). Integrated database. www.diagnoza.com [exact date of downloading]

Report 2003, 2007-2015

- Report 2003
- Report 2007
- Report 2009
- Report 2011
- Report 2013
- Report 2015

Questionnaires 2000-2015

- Questionnaires 2000
- Questionnaires 2003
- Questionnaires 2005
- Questionnaires 2007
- Questionnaires 2009
- Questionnaires 2011
- Questionnaires 2013
- Questionnaires 2015

DataBase 2000-2015

- Read Me
- Household .SAV
- Individual resp. .SAV