



Tourism sector in the Republic of Belarus



NATIONAL AGENCY OF
INVESTMENT AND PRIVATIZATION
REPUBLIC OF BELARUS



1. General characteristics of the industry and its most important indicators

| | |
|--|----|
| 1.1 Main economic indicators and industry trends..... | 3 |
| 1.2 Key tourist attractions (tourist resources, what makes Belarus attractive: natural and climatic conditions, historical and cultural values, national color, etc.)..... | 5 |
| 1.3 Human resources..... | 12 |
| 1.4 Legal environment and public policy..... | 13 |

2. The Belarusian market of tourist services overview

| | |
|---|----|
| 2.1 Key operating indicators..... | 14 |
| 2.2 Characteristics of tourists in Belarus..... | 16 |
| 2.3 Description of the main market segments (natural, cultural, educational, religious, event, gastronomic tourism, etc.)..... | 18 |

3. Investment potential

| | |
|---|----|
| 3.1 Characteristics of infrastructure facilities of the industry..... | 27 |
| 3.2 Main tourism clusters and investment proposals | 28 |

| | |
|--|-----------|
| 4. Information about NAIP | 36 |
|--|-----------|

1. General characteristics of the industry and its most important indicators

1.1 Main economic indicators and industry trends



The tourism sector in Belarus has begun to recover from the consequences of the pandemic. The 2022 season has had quite a dynamic development. So in 2022 the number of served visitors was 2.02 million, in 2021 - 1.74 million (an increase of 16.09%). At the same time the number of visitors leaving the country in 2022 compared to the previous year decreased by 27.19%, while the number of visitors entering the from the country increased by 100.28% (In 2022, 143 thousand people entered vs. 71,400 in 2021, twice as many). The number of persons vacationing in hotels and similar accommodations increased by 28.79% (1,898.8 thousand in 2022 vs. 1,474.3 in 2021).

The number of foreign tourists and excursionists who visited the Republic of Belarus in 2022 was 143 thousand people (including tourists - 42,45%, excursionists - 57,55%). The largest number of tourists in 2022 was in Minsk (45%) and the Brest region (38%). Moreover, in Minsk 60% were tourists and 40% were excursionists, and in Brest region - 18% tourists and 82% excursionists. The objects of agroecotourism were visited by 19 thousand people, which amounted to 3.4% of the total flow of foreign tourists.

The main flow of foreign tourists was from Russia - 92.4%, Latvia - 2.7% and Lithuania - 0.9%. Also, the top 10 countries (out of 55) included (in descending order) Ukraine (0.4%), Estonia (0.3%), Turkey (0.3%), Germany (0.3%), Kazakhstan (0.2%), Poland (0.2%), China (0.2%). Average duration of stay in the Republic of Belarus of one foreign tourist is 5 days. On average, the revenue from the accommodation of one foreign tourist is \$75 and \$36 for a Belarusian tourist.

The number of organizations that carried out their activities amounted to 1203, including 293 operators, 642 travel agents and 268 organizations combine these activities. According to the form of ownership 86.28% of organizations belong to the private form of ownership, 10.47% - to the state, 3.24% - to 3,24% - to the foreign form of ownership. Agro-ecotourism services were represented by 3,043 organizations, of which 35% are located in the Minsk region.

According to the results of 2022, the revenue of industry organizations amounted to \$147.2 million, profit - \$128.3 million. The profitability of tourist services amounted to 14.76%.



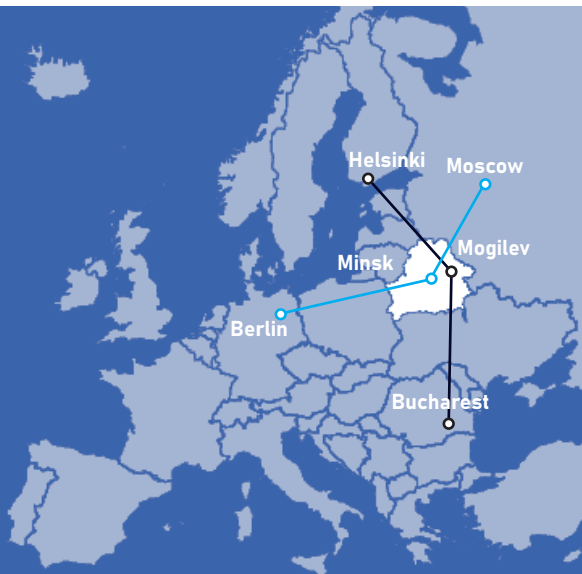
1.2 Key tourist attractions

Favorable geographical location of Belarus is the main driver of the development of the tourism sector and its indisputable advantage over other countries.

Moreover, the **developed and efficient transport network** connects Belarus with remote countries and allows foreign tourists to quickly reach and comfortably travel around the country from anywhere in the world, which is the key to the successful development of tourism:

2 out of 10 trans-European transport corridors pass through Belarus.

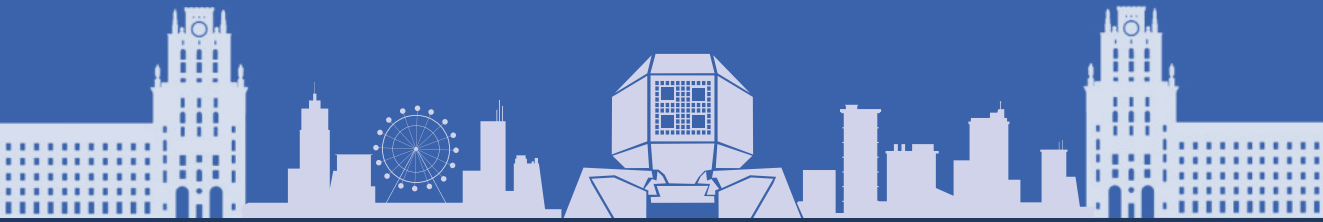
- Berlin - Minsk - Moscow
- Helsinki - Mogilev – Bucharest



The longest railway in the world passes through Belarus. The route is twice as long as the Trans-Siberian railway, which runs on tracks from the European part of Russia to the Pacific harbour of Vladivostok: it would take three weeks to travel from the starting point to the finishing point.



The most popular attractions in Belarus visited by foreign tourists



Minsk



Trinity Suburb

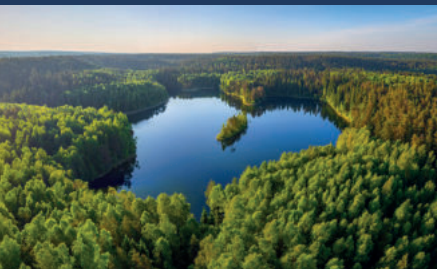


National Academic Bolshoi
Opera and Ballet Theatre



National Library
of Belarus

Minsk region



National park
Narochansky

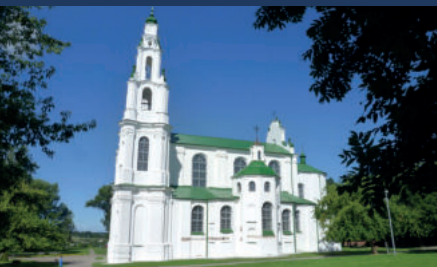


Historical and cultural
museum-reserve «Zaslavl»

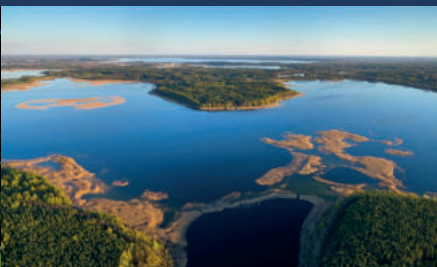


Museum of ancient folk crafts
and Technologies

Vitebsk region



Saint Sophia Cathedral
in Polotsk



Braslaw Lakes



Summer Amphitheatre

Grogn region



Lida Castle



Grodno farny church



New castle in Grodno

Mogilev region



Memorial complex
"Halubaya Krynitsa"



The memorial complex
"Buinichskoe Pole"



Palace and park ensemble
in Zhilichi

Gomel region



Gomel Palace and
Park ensemble



Manor of Lieutenant General
M. Gatovsky



Pripyatsky
National Park

Brest region



Brest Hero Fortress Memorial



Belaya vezha
7



Belovezhskaya Pushcha
National Park

Belarus has unique **natural resources**.

There are 14 thousand species of plants, 28 species of trees and about 70 species of bushes. Belarus is a habitat for 310 species of birds, 27 thousand species of diverse animals.

Belarus is also rich in water resources - there are 20,800 rivers and streams running through its territory. There are about 7 thousand swamps, which remove about 900 thousand tons of carbon dioxide from the atmosphere and release 630 thousand tons of oxygen. Belarusian bogs are rightly called "lungs" of Europe for that. The oldest bogs are 11 thousand years old.

There are more than 1.3 thousand specially protected natural territories in Belarus. Their total area is about 1.9 million hectares or 9% of the total area of the country.



In Belarus there are:

381 nature preserves

255 hunting grounds

1 reserve
Berezinskiy
biosphere
reserve

4 National Parks:
"Bialowieza Forest", "Braslav lakes",
"Narochansky", "Pripyatsky"



Belovezhskaya Pushcha is the largest relict forest in Europe.

There are 958 species of plants, 59 species of mammals, 227 species of birds and 24 species of fish.

There is also the estate of Santa Claus (Father Frost), which is annually visited by 150 thousand people.

Belovezhskaya Pushcha is included in the UNESCO World Heritage List.

The Belarusian Ded Moroz (Father Frost) tops the rating of the most popular in the CIS countries and Georgia, according to travel portal TourStat.



Because of its richness and attractiveness, the Belarusian lands have repeatedly become an arena of hostilities: The Patriotic War of 1812, World War I (1914-1918) and the Great Patriotic War (1941-1945).

This influenced the formation of a **rich military-historical heritage** of the country, which has survived to this day:

- majestic defensive castles and impregnable structures,
- numerous memorial complexes and obelisks,
- Victory Monuments and Eternal Lights, immortalizing and glorifying the feat of the people.



The historical and cultural wealth of the Republic of Belarus includes 2.2 thousand archaeological monuments, 1.8 thousand architectural monuments, as well as more than 5.5 thousand of historical and cultural values which are kept in 160 museums.

4 objects on the territory of the Republic of Belarus are included in the UNESCO World Heritage List:

- Belovezhskaya Pushcha
- Mir Castle Complex
- Struve Geodetic Arc
- Radziwill Palace and Park Complex in Nesvizh.

From time immemorial, Belarus has laid down its customs and traditions, carefully preserving the heritage of the past, which has become the basis of the **cultural component of the nation**. Some traditions have survived to this day, including many types and forms of traditional culture (straw and vine craftsmanship, embroidery and weaving, glass painting and pottery). Also a number of folk festivals, such as Kupalye, Dozhinki, Kolyady, Maslenitsa, are brightly and widely celebrated every year on the Belarusian soil. The UNESCO Intangible Cultural Heritage List includes:

- festive Christmas rite "Kolyadny kings" in the village of Semezhevo (Minsk region);
- celebration in honor of the veneration of the icon of the Mother of God of Budslav in the city of Budslav (Minsk region);
- spring ritual "Yuryevsky round dance" in the village of Pogost (Gomel region).

The state promotes the development of culture and involvement of Belarusian citizens in the cultural life of the country in every possible way. In 2011, Belarus adopted the Code on Culture, and every 5 years the state program "Culture of Belarus" is developed. In addition, the annual campaign "Cultural Capital of Belarus" is held, which attracts the attention of the public and foreign tourists.

A distinctive national feature of the Belarusians is their hospitality and tolerance. Since ancient times, **25 religious confessions** and trends have peacefully coexisted on the Belarusian land. There are about **2.8 thousand religious buildings** in the country, which attract pilgrims from all over the world.

The national cuisine, known since Soviet times, is gaining popularity among foreign guests of the republic and is able to satisfy the tastes of the most sophisticated gourmets.

Today about **73 international gastronomic festivals** are held annually in Belarus, which are attended by iconic bars and restaurants of the country, including 220 specialized establishments offering exclusively national cuisine.



Belarus is unique not only because of its distinctive culture, but also because of its **mighty industry, the largest factories and plants in the world.**

Leading flagships of the domestic industry also open their doors to tourists (the Belarusian Automobile Plant, Minsk Tractor Plant, confectionery factories "Kommunarka" and "Spartak", brewing company "Alivaria", glass factory Neman, Orsha flax mill, Belarusian Potash Plant).

Belarus is proud of its **developed healthcare system**, as well as achievements in the field of domestic medicine. The medical staff is one of the most qualified in the world, and the quality of the services provided is highly valued not only in the country, but also abroad. In terms of the number of doctors per 10 thousand population, Belarus occupies a leading position, ahead of such countries as Russia, the Netherlands, France, Great Britain, Poland and others.

In Belarus, there are 483 health resort and health-improving organizations, 609 hospital organizations, 1,432 outpatient polyclinic organizations, 17 republican and Minsk scientific and practical centers, whose services in 2020 were used by about 160 thousand foreigners from 144 countries.

It is also important that the Republic of Belarus has won a well-deserved place on **the world sports arena**, proving itself an active participant and a worthy organiser of many well-known sports events which attract the attention of foreign fans. About 80 international competitions are held in the territory of the republic every year. So, the country has organized and conducted at a high-level Hockey World Championship in 2014, which was attended by more than 640 thousand people (80 thousand of them - foreign fans), the II European Games in 2019 was attended by about 40 thousand foreign tourists.

Thus, Belarus has a wide range of tourist attractions that attract tourists from all over the world and generate income for the domestic tourism industry.

1.3 Human resources

In order to provide tourism services at a high level, providing competitive quality service and excursion services to tourists, development of new and renewal of existing tourist products, it is necessary to provide the sector with qualified personnel.

At present, 8 institutions of specialized secondary education and 16 institutions of higher education (annual output: 260-290 and 1,550-1835 specialists respectively) train personnel for the tourism sector in the Republic of Belarus. Training is carried out mainly on a fee basis. Of the total number of graduates, 18 to 24% are distributed and employed in accordance with their specialty (or 100% of graduates who received a profession at the expense of the budget).

In addition, in order to maintain a high level of excursion services in the Republic of Belarus, professional certification of guides and interpreters is carried out. In 2022 there are 1052 guides and 223 guide-interpreters in the country. The largest number of guides is in Grodno and Brest regions. For the convenience of tourists there is a national register which contains information about this category of workers and the topics they know.

One of the educational institutions for training professionals in the field of tourism is the Belarusian State University, a structural unit of which is the Department of International Tourism.

The department took an active part in the creation of National Programs of Tourism Development for the years 2001-2005, 2006-2010, as well as the State Program for the years 2010-2015, 2015-2020.



1.4 Legal environment and public policy

On January 1, 2023 a new **law "On Tourism"** came into force. It provides for the introduction of institutions of financial responsibility of the tour operator to compensate losses to consumers of travel services. The new law proposes to separate the responsibility of the tour operator (the one who organizes the trip) and the travel agent (the one who only sells it to consumers).

Presidential Decree No. 351 "On the development of agro-ecotourism" of October 4, 2022. The decree is aimed at improving the regulation of activities in the sphere of agroecotourism, improving the quality of services, eliminating the possibility of running a hotel or restaurant business under the guise of agro-ecotourism, as well as protecting the rights of citizens living in the neighborhood of homesteads.

Decree of the Ministry of Health of December 8, 2022 No. 116 "Sanitary and epidemiological requirements for the maintenance and operation of agro-farms" approved the sanitary norms and rules. This document details and establishes requirements for the maintenance and operation of both the territory of the farmstead and its premises: living rooms, sanitary facilities, kitchens, baths, as well as requirements for providing agro-ecotourists with food.

On December 7, 2022 Decree № 839 "On measures to support the tourism industry, the development of domestic tourism and international tourism" was adopted. The document established the first contribution to the liability fund of tour operators in the amount of not less than 1 thousand basic units. The decree approved the regulation on the order and conditions of establishment and operation of tourist information centers, as well as their accounting.

The State program "Belarus Hospitable" for 2021-2025 is aimed at the formation and development of a modern competitive tourist complex, increasing the contribution of tourism to the development of the national economy. The development of inbound and domestic tourism, increasing the competitiveness of tourist services and the promotion of national tourist brands in the world market are defined as priorities in the field of tourism.

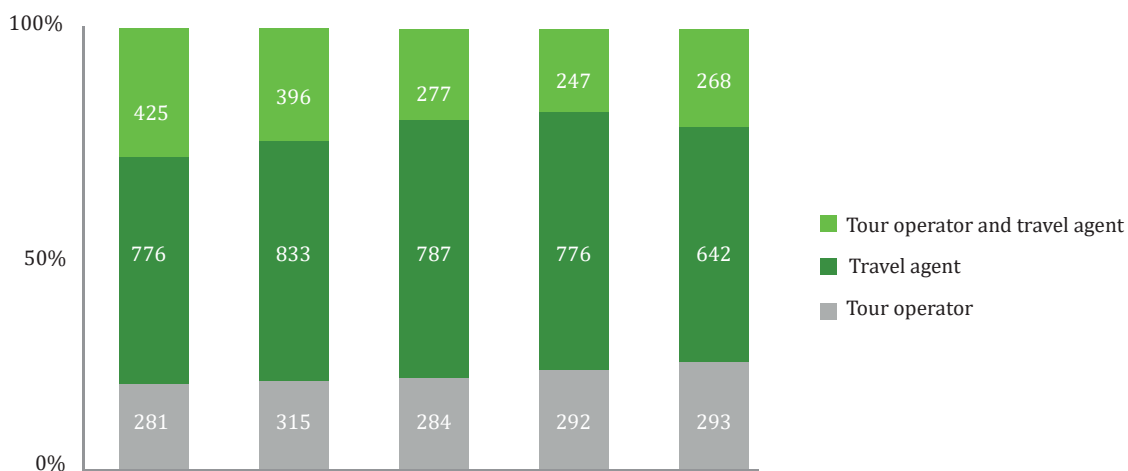
2. The Belarusian market of tourist services overview

2.1 Key operating indicators



The number of organized foreign tourists entering Belarus began to gradually recover after the pandemic. Compared with 2021, the number of foreign tourists has increased by 2 times against the background of a decrease in the total number of organizations engaged in tourism activities.

Quantitative indicators of organizations in the tourism industry



The structure of travel companies in Belarus, thousand people

The number of organized foreign tourists in 2022 was 143 thousand people, while the maximum number of tourists reached 405 thousand people in 2019. This is higher than the 2022 value by 65%. Exports of tourist services in 2022 amounted to 177.8 million dollars. Globally, international tourism recovered 63% of pre-pandemic levels in 2022.

The number of organizations providing tourism services was 1,203 organizations, which is less than the maximum of 1,544 organizations in 2019 by 22%. For the period from 2021 to 2022, the number of tourist organizations decreased by 8.5%.

The decrease in the number of tourist organizations was due to a decrease in the share of travel agents in the structure of tourist organizations by 5.6% with a simultaneous increase in tour operators by 2,2% and travel agents-tour operators by 3,5%. In other words, the market began to leave the travel agents, that is, organizations that do not form the tourist product, and buy it from the tour operator ready to for sale. As of 2022, travel agents occupy 53,4% of the market of tourist services.



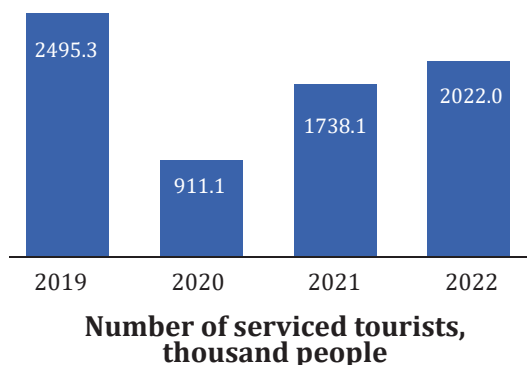
**Financial indicators
of tourist organizations**

Despite the gradual decrease in the number of tourist organizations (the average annual loss is 4.1%), the industry shows a steady growth in revenues from sales of tourist services (the average annual growth rate is 7.6%).

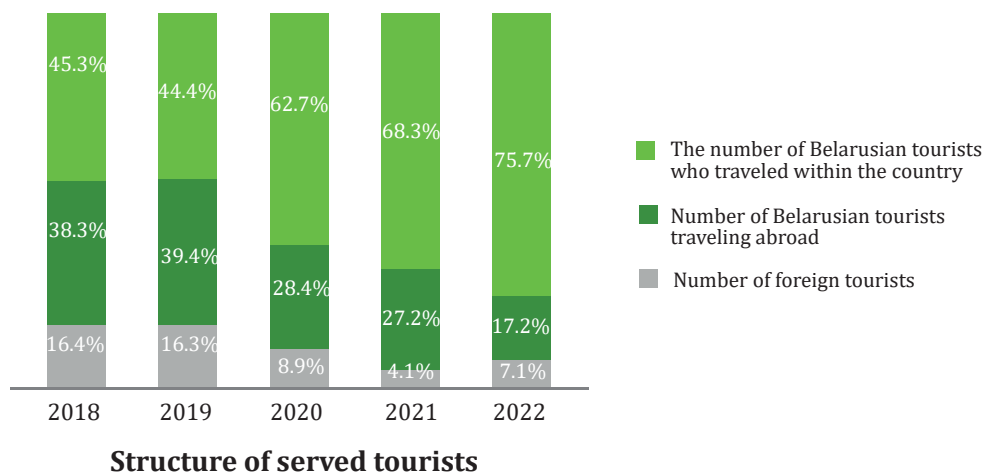
Profit also shows upward trends - the average annual growth rate was 12.6% for the period 2018 to 2022.

2.2 Characteristics of tourists in Belarus

The total number of tourists and excursionists served in 2022 was 2022 thousand people. The lowest value was observed in 2020 (911,100) during the active spread of COVID-19.



After 2020 there is a recovery of the tourism sector. For the period 2021/2020 the growth of tourists and excursionists served was 90.77%, for 2022/2021 - 16.33%.



If we consider the structure of tourists served, we can note a number of important points: an increase in the share of tourists and sightseers traveling within the country (domestic tourism); a decrease in the share of Belarusian citizens traveling abroad (outbound tourism) and a gradual increase in the share of foreign tourists (inbound tourism).

However, as the number of citizens traveling within the country grows, the corresponding share of the cost of tours sold decreases. The main volume is occupied by tours of Belarusian citizens outside the country - about 90%. According to the data of 2022, the total value of tours abroad is \$283.4 million, while the value of tours of Belarusians abroad is \$244.7 million. This situation is explained by the different cost of tours in the framework of inbound, outbound and domestic tourism. Thus, the average cost of tours per served tourist is about \$180. The cost of tours per foreigner is on average \$140, per Belarusian citizen (inside the country) - \$14, outside the country - \$560.

In terms of geographical structure of foreign tourists and excursionists, their main flow in 2022 was from the CIS countries - 95.7%, from the EU countries - 3.4%. If we consider only tourists (without excursionists), then from the CIS countries - 93.4%, from the EU countries - 5.0%. It should be noted that 99.1% of all tourists and excursionists come only from these two regions.

From the point of view of the country structure, the top leading countries in terms of tourists in 2022 included neighboring countries and non-CIS countries. On average, the duration of stay of tourists in our country is 5 days, tourists from the EU - 3 days.

Top 10 countries by inbound tourism in 2022

| Country | Tourists and sightseers, people | Share, % | Of which tourists, people | Share, % |
|----------------|--|-----------------|----------------------------------|-----------------|
| Russia | 136 008 | 95.2% | 56063 | 92.4% |
| Latvia | 2164 | 1.5% | 1654 | 2.7% |
| Lithuania | 751 | 0.5% | 574 | 0.9% |
| Poland | 737 | 0.5% | 144 | 0.2% |
| Germany | 504 | 0.4% | 163 | 0.3% |
| China | 305 | 0.2% | 106 | 0.2% |
| Kazakhstan | 278 | 0.2% | 149 | 0.2% |
| Ukraine | 247 | 0.2% | 239 | 0.4% |
| Estonia | 224 | 0.2% | 200 | 0.3% |
| Turkey | 181 | 0.1% | 166 | 0.3% |

2.3 Description of the main market segments

The following tourism segments are the most widely developed in Belarus:

Historical and cultural tourism

The Republic of Belarus has 67 monuments of art, 2240 monuments of archaeology, 1829 monuments of architecture, 1216 monuments of history and 13 monuments of urban development. The architectural heritage of the country is represented by a number of historical buildings and constructions, ranging from Byzantine style of the 11th century to Stalin Empire architecture monuments of postwar construction.

**National Historical and Cultural
Museum-Reserve «Nesvizh»
(XVI century)**

Cost of visit: \$0.2-5.8



**Mir Castle complex
(XVI century)**

Cost of visit: \$1.5-6.1

**Museum complex of ancient crafts and
technologies "Dudutki" (XIX century)**

Cost of visit: \$2.7-10.3



Belarus is a country rich in folk craftsmen and talented artisans. Many types of traditional crafts have survived to this day, such as blacksmithing, weaving, straw weaving, pottery, and many others. In 2022, there were a total of about 50,000 artisans in Belarus. There are 7 ethnographic museums in the country. The most famous are the museum complexes "Dudutki" and "Dukorsky Mayontak", the history park "Sula".

Military historical tourism

An important landmark in the history of the Republic is its rich military past, a legacy of which is the presence of some 9,000 military monuments and artefacts, reminiscent of the feats of military glory of the sons of Belarus.



Memorial Complex "Brest Fortress-Hero"

Cost of visit: \$0.5-53.3



Belarusian State Museum of the History of the Great Patriotic War

Cost of visit: \$1.9-22.8



Historical and Cultural Complex "Stalin line"

Cost of visit: \$3.80-7.6

Nature tourism

Belarus is endowed with unique natural and climatic resources and is known as the land of rivers and lakes. And the Belarusian forests and swamps are the real pride of our country.

Belarus has 20.8 thousand rivers and streams, about 11 thousand lakes, 7 thousand swamps, 14 thousand plant species, including 28 tree species and about 70 shrub species, 310 bird species and 27.1 thousand various kinds of animals.

Belarus also has 2 reserves and 4 national parks, one of which is included in the UNESCO World Heritage List.

Belovezhskaya Pushcha National Park

Cost of visit: \$1.5-6.5



Braslav Lakes National Park

Cost of visit: from \$50/day



Reserve "Olman swamps"

Cost of visit: \$10-530



Industrial tourism

Belarusians are characterized as a hard-working nation, the pride and heritage of which is a modern developed industry with 16,000 plants and factories, including powerful and largest industrial flagships in the world (BelAZ, MAZ, MTZ, Belaruskali).

The Republic ranked 46th among 154 countries in the Manufacturing Competitiveness Index (2021).

The Belarusian Automobile Plant, founded in 1948, produces every third mining dump truck in the world. The largest dump truck in the world (810 tons) was created there and was listed in the Guinness Book of Records.



Belarusian Automobile Plant

has been visited by over 190,000 tourists in 8 years

Cost of visit: \$19.7-23.6

Kommunarka Confectionery Factory

Cost of visit: \$14.8



Soligorsk Salt Mine

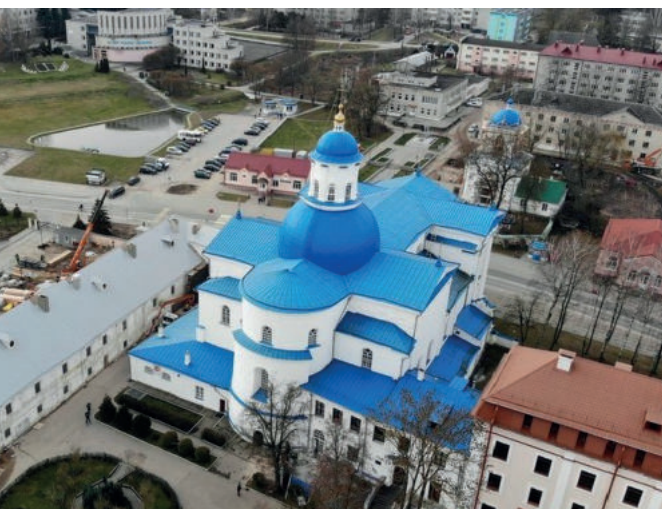
Cost of visit: \$28.0



Religious tourism

The Republic of Belarus is a multi-confessional state. There are 25 registered religious confessions and trends. The total number of religious organizations is 3.5 thousand.

There are 2.6 thousand active religious buildings and 255 buildings under construction, where pilgrims from all over the world flock to Belarus to take part in religious rites and to touch the relics.



Zhirovichi Monastery



Saint Sophia Cathedral in Polotsk
(listed by UNESCO)

Agri-ecotourism

Today, more than 3 thousand agro-farms, located in picturesque corners of Belarus, receive guests of the country. Almost 500 thousand tourists were served by agroforestry farmsteads in 2022. The cost of accommodation in agro-farms starts at \$15.2/day.

The best estates of Belarus: "Nanosy Rest", "Maxi-Relax", "Belovezhskaya Guesthouse", "Valeria", "Vyasely Hutar".



Medical and health tourism

There are 295 health resorts and recreational organizations in Belarus, the services of which in 2022 were used by more than 1.4 million people. Approximate cost of accommodation in a standard 2-bed room with meals and procedures for foreign citizens is starting from 30 euros per day per 1 person.

Medical tourism

Foreigners highly appreciate the quality of Belarusian medicine. In 2022, 149.5 thousand foreigners rested and improved their health in 474 Belarusian sanatoriums and health resorts. Of these, 128.2 thousand rested in 75 sanatoriums.

In 2022, medical services were provided to foreign citizens from 148 countries. The top countries are Russia, Ukraine, Kazakhstan, Latvia, China and Israel.



Hunting tourism

The country is endowed with favorable natural conditions and rich biodiversity for the development of hunting tourism. The area of Belarusian hunting grounds is 17.0 million hectares. There are 91 functioning hunting complexes, which meet the modern requirements and provide recreation for all the citizens who wish.



In 2021 the revenues from foreign hunting tourism in the republic amounted to 2.2 million dollars.

The cost of organizing hunting on average is 80 euros/day.

Event tourism

1. Cultural

There are 28 theaters in Belarus, which in 2022 were visited by 1.4 million people visited them in 2022. The cost of attendance depends on the production and varies from \$2.7 to \$20.

The most popular theaters are the Bolshoi Opera and Ballet Theater (Swan Lake, The Nutcracker, Carmen, The Flying Dutchman, La Traviata, Don Quixote), the Belarusian State Academic Musical Theater (they put operettas, musical comedies, musical revues, ballets, rock operas, performances for children), the New Drama Theater (plays by Andrei Kureichik, one of the most famous Belarusian screenwriters and directors, were staged in this theater), the Yanka Kupala National Academic Theater (performances only in Belarusian, the most famous performances are Vechar, Pinsk Gentry), the Republican Theater of Belarusian Drama, the Puppet Theater.

The country's cultural life is diversified and enriched by numerous festivals with a variety of cultural themes, about 125 of which are held annually, including an international festival of fireworks, as well as a race of retro cars and motorcycles.



International Festival of Arts "Slavianski Bazaar" in Vitebsk

In 2022, the festival welcomed guests from 32 countries. There were 270 events at 21 venues. More than 50 thousand people attended the festival events.

Cost of visit: from \$22.1 to \$71.5 (2022).

Minsk International Film Festival "Listapad"

Every year this film forum is visited by more than 40 thousand spectators and many celebrity guests from all over the world.

Cost of visit: from \$2.5 to \$7.0 (2022).



2. Sports

Belarus has consistently ranked among the top 20 strongest of the more than 200 sports powers of the world taking part in the Olympic Games. It ranks 32nd in the World Ranking of Countries in Elite Sport. More than 70 international sporting events will be held in Belarus in 2023.

There are more than 23 thousand sports facilities in Belarus. Every year about 22 thousand sport events are held in the country and the number of their participants is growing, including foreign participants. Some of the largest annual sports competitions with participants from different countries held in Belarus include:

The Christmas International Tournament of Hockey Amateurs for the Prize of the President of the Republic of Belarus

In the history of the tournament, players from more than 30 countries have competed for the main trophy.

Cost of visit: 2\$



Minsk Half Marathon is the largest running event in Belarus.

In 2022, it was attended by 11,000 people from nearly 20 countries. The prize fund of the competition was 50,000 rubles.

Cost of visit:

Run participation from \$9.5 to \$38 in 2022 (cost depends on length of course)



Equestrian tournaments are one of the exciting and dynamic spectacles.

About 30 national equestrian events, including 8 international competitions, are held in Belarus every year.

In total, there are about 90 equestrian clubs in the country.



There is a **golf club** in Belarus, which organizes and conducts its own tournaments, the infrastructure of which is 2 fields with 27 holes, with a total area of 76 hectares.

There are 29 golf tournaments scheduled for 2023. The cost of participation is from \$23 to \$103 per day.

For the first time ever, Belarus took part in the World Amateur Golf Championship in the **Golf Cup Dubai 2021**.

The Belarus Sailing Championship brings together yachtsmen from all the regions of the country every year. On average, there are 170 participants. In total, there are 4 yacht clubs and 5 sailing schools in Belarus.

The winners are given the opportunity to represent Belarus at international competitions.



3. Investment potential

3.1 Characteristics of infrastructure facilities

The Republic of Belarus has a developed and modern tourist infrastructure, able to meet a wide range of needs of tourists at a high level. Every year the country renews and creates new tourist facilities for comfortable accommodation and the pastime of tourists.

In 2022 there were 1,066 collective means of accommodation in the republic, of which 474 were health resorts and recreational organizations, 592 were hotels and similar means of accommodation.

Hotels and similar means of accommodation were used by 1.9 million people, including citizens of Belarus - 1.1 million people (58%), foreign citizens - 797 thousand people (42%). The occupancy rate of hotels and similar accommodation facilities was 29.3%. Thus, despite the increase in the number of served tourists and excursionists, hotel occupancy was less than a third of their total number.

Sanatorium-resort, health-improving and other specialized accommodation facilities (rest houses, boarding houses, etc.) were used by 934 thousand people, of which 785 thousand people (84%) were citizens of Belarus and 149 thousand people (16%) were foreign citizens.

The number of subjects of agro-ecotourism in 2022 was 3,043. The number of tourists served by them was 560 thousand people, of which 540 thousand people were citizens of Belarus (96.6%) and foreign citizens - 19 thousand people (3.4%).

Thus, the tourist sector in Belarus has an extensive modern infrastructure, the potential of which allows serving the increasing tourist flows and contributes to the further development of domestic and inbound tourism.

3.2 Main tourism clusters and investment proposals

Cultural and historical cluster "Brest"



Location

Brest region
Central part of Brest

Infrastructure

Existing infrastructure facilities:

- Museum complex "Brest Fortress"
- 11 hotels
- Over 10 bars and 12 restaurants
- Embankment of the river Mukhavets
- Museum of railway equipment
- Section of the highway M-1 (E30) border crossing "Warsaw Bridge"

Planned infrastructure:

- Hotel and hostel with a capacity of 45 and 130 beds respectively
- Restaurant and karaoke club for 220 seats
- Bowling on 2 lanes
- Sports complex (300 sq. m.)

Projects for implementation

Construction of the tourist complex "Senoval" (greenfield, estimated investment - 2.5 million euros)

I phase of construction: renovation of the existing Great Powder Cellar, built in 1878, with the placement of a historical museum of the times of the 18-19th centuries; construction of a youth hotel, hostel, entertainment and sports centers.

Phase II: Construction of a lianpark, infrastructure for pupils in grades 5-11 and young people, facilities and equipment from the 19th to mid-20th century.





Location

Brest region.
Pinsk,
Pinsk district

Infrastructure

Existing infrastructure facilities:

- 3 roadside service facilities
- 3 hotels
- Tourist complex Relax
- 25 farm stays
- Hunting complex

Planned infrastructure:

- "Development of tourist infrastructure": arrangement of recreation areas on water bodies of the tourist route "Yanovskoe Ring" in Ivanovo district, creation of new accommodation facilities in the town of Pinsk, etc.);
- "Events", the international culinary festival "Motalskia pysmakki", the art festival "Zori nad Pina", the festival "Luninecki Klubnitsy";
- Tourist route systems in the Pripychnoye Polesye (canoeing trail "Bug unites us", tourist route "In the palms of Yaselda and Pripyat", bicycle route "Yanaŭski rovar")
- Creation of a system of tourist information centers.

Projects for implementation

**Creation of an ecotourism complex in the Pinsk region
(brownfield, estimated investment - 150 thousand euros):**

"Comprehensive reconstruction of the children's park on Z.Kosmodemyanskaya street in Pinsk (brownfield)

Conservation of the Chapel in Molodovo, Ivanovsky district. Roof restoration (brownfield)

Restoration of the family estate of N. Orda in Krasny Dvor tract, Ivanovsky district (brownfield)





Location

Vitebsk region
Braslav district

Infrastructure

Existing infrastructure facilities:

- 303 agro-eco-farms
- 9 health resort organizations
- 52 tourist routes
- 84 tours. Parking lots for 2,000 people
- the country's largest sports and recreation complex "Braslav Lakes"
- Annual holding of the international holiday of traditional culture "Braslav lightning" and the youth festival "Viva Braslav"

Projects for implementation

Creation of a lounge area on the beach of Lake Derivates (greenfield)

Water camping construction (greenfield)

Construction of a spiral path through the forest park to the observation deck (greenfield)

Construction of the cottage village "IT village" (brownfield)

Reconstruction of the complex of historical and cultural value "Former Count's Estate", including the construction of a health resort or cultural and entertainment complex (brownfield)





Location

Vitebsk region
Gluboksky district, village Ives

Infrastructure

Existing infrastructure facilities:

- 47 agro-farms
- 8 health resort organisations
- 20 tourist trails
- Annual holding of the outstanding international festival "Cherry Festival"
- 80 lakes, including Dolgoye lake, the deepest lake in Belarus (56 m)

Projects for implementation

"Green Legacy of the Ancestors": Creation of an agro-farm and training centre for organic farming on the basis of the count's estate and economic park in the village of Potupy, Glubokoe district, (brownfield)

"Orange windmill for orange mood": the creation of an agro-eco estate with a circus arts centre and the Clownarium museum on the premises of a former school in the village of Zybki, Glubokoe District, (brownfield)

"Legends of the "Belarusian Baikal": creation of an eco-complex, including a nature museum, an environmental visitor's centre and an eco-trail in the village of Zybki, Glubokoe District, based on the state environmental institution "Golubov Sad" and the national lake reserve "Dolgoe Lake", (greenfield)

"Park of Europe in the Center of Europe": the power of space and the wisdom of ancestors: the creation of a tourist entertainment and educational complex "Park of Europe" in the village of Ives - the geographic center of Europe, according to "Belkosmoaerogeodesy", (greenfield)

"Stairway to Heaven": creation of a cultural and spiritual-educational art space with an art gallery, a classical and sacred music hall, a cinema hall, etc. on the basis of the building of the Barefoot Carmelite monastery in the town of Glubokoe in the 18th century, (brownfield)

"Game Territory": construction of a training ground for active and extreme games on the basis of the complex of the former flax mill in the town of Podsvilie Glubokoe district, (brownfield)

"Hospitable tavern": construction of a roadside service facility including a camper van, mini-hotel, roadside cafe, spa complex on the basis of the former forestry farm building in Prozoroki village, Glubokoe District, km 48, left-hand side of the R-45 motorway, (brownfield)



Cluster of Gomel region



Location

Gomel region,
Gomel district

Infrastructure

Existing infrastructure facilities:

- Presence of an international airport
- The territory is crossed by the trans-European transport corridor Helsinki - St. Petersburg - Gomel - Kiev - Bucharest and its branches Vilnius - Minsk - Gomel
- Sanatoriums "Chenki" and "Mashinostroitel"
- 8 farmsteads
- Hotel and restaurant complex "Belaya Dacha"
- Availability of a physical culture and sports complex
- Objects of military-historical value (the location of the partisan detachment "Bolshevik", military graves)

Projects for implementation

Construction of a 20-bed transit hotel at the Novaya Huta border crossing
(brownfield)

Construction of a health-improving cultural and entertainment center "Aquapark"
(greenfield)

Building an agro-eco estate (greenfield)

Reconstruction and construction of the recreation center "Dneprovsky Zori"
(brownfield)

Tourist and recreational park "Augustovsky Chanal"



Location

Grodno region,
Grodno district

Infrastructure

Existing infrastructure facilities:

- The territory has a preferential regime of the special economic zone
- National Park Belovezhskaya Pushcha
- 10 nature reserves
- 50 natural monuments
- 332 monuments of architecture
- 692 immovable historical and cultural values

Projects for implementation

- **Creation of a tourist complex with seasonal expansion** (greenfield)
- **Creation of a tourist and hotel complex** (greenfield)
- **Creation of food facilities with the possibility of seasonal expansion** (greenfield)

Cluster of the Slutsk region



Location

Minsk region,
Slutsk district

Infrastructure

Existing infrastructure facilities:

- Hotel "Slutsk"
- Hotel "Leman"
- Museum of the history of the Slutsk belts
- Museum of local lore
- Art Gallery
- Historical sights of Slutsk

Planned infrastructure:

- Sports and tourism centre;
- Restoration of a former twentieth-century school building;
- Playgrounds for sports

Projects for implementation

Creation of a sports and tourist center on the basis of the building of the former commercial school (brownfield)

Tourist cluster "Pristolichie"



Location

Minsk region,
Minsk district

Infrastructure

Existing infrastructure facilities:

- Mini-hotel with 7 rooms
- Restaurant with outdoor terrace
- Private beach and pier
- 1st coastline of the Minsk Sea
- Entertainment sports complex with racing tracks;
- Olympic training centers "Stayki", "Raubichi"
- Farm stays
- Ecological cluster "There is no spare planet"

Projects for implementation

Riviera hotel center concept (brownfield, estimated investment volume - 1.6 million euros)

Creation of a year-round recreation centre, including the creation of sports facilities, as well as the zoning of the area with the construction of an amphitheatre and pavilions for recreation and relaxation.



Location

Minsk

Infrastructure

Existing infrastructure facilities:

- More than 80 restaurants and more than 90 bars
- 9 hotels of category 3-5 stars
- 6 museums and 4 art galleries
- 14 theaters and 1 circus
- 480 objects of historical and cultural values
- Over 60 memorials and monuments

Planned infrastructure:

- Shopping street of elite world brands (retail street zone),
- Belarusian Folklore Center,
- 2 international congress centers for 5 and 15 thousand seats,
- Theme parks "Adventure Country", "Water Park" and "Bend of the Svisloch"
- Sports park "Techno-sport",
- Complex "Hippodrome",
- New international EXPO center with an area of up to 100 hectares,
- Holding the annual World Fireworks Championship in Minsk,
- Development of the "Minsk Card - Cities & Regions of Belarus" system in electronic format.

Projects for implementation

"Tourist zones of Minsk"

(greenfield, implementation period: 2021-2023)

Project prospects:

Inclusion of Minsk in the top 100 leading destination cities of the world.

Annual flow of foreign tourists of at least 2 mln people.

Increase of domestic tourism flows by 40%.

Export volume of international tourism services and passenger transportation of \$1.1 billion and more.



Ecological-tourist-recreational cluster "Chigirinka"



Location

Mogilev region,
Kirovsky and Bykhov districts

Infrastructure

Existing infrastructure facilities:

- The territory of the Chigirinsky reservoir
- 21 farm stays
- 3 recreation centers
- 8 summer houses
- 2 capital buildings of the former school
- Holding festivals (Bard-fishing), sports events (little Thailand, Muaythai camp)
- Availability of attractions (Island of Love, Holy spring and burial mounds in the village of Yadrnaya Sloboda, Memorial "In Memory of the Burnt Villages" in the village of Borki, Chigirinskaya hydroelectric power station)

Projects for implementation

"Organization of a recreation area, construction of a tourist entertainment complex"
(greenfield, estimated investment volume - \$1.3 million)

Cluster of Slavgorod district



Location

Mogilev region,
Slavgorodsky district,
The territory of the wetland
reserve "Slavgorodsky"

Infrastructure

Existing infrastructure facilities:

- A plot of 14.8 thousand hectares
- Hydrological natural monument of republican significance "Golubaya Krinitsa"
- The annual celebration of the religious holiday of Maccabeus
- "Honey Market" and shopping malls of fast food facilities
- 2 cycle routes and 1 eco-trail
- Camping sites

Projects for implementation

Construction of an agroestate in the village of Dubno near Lake Svyatoye (greenfield)

National Agency of Investment and Privatization

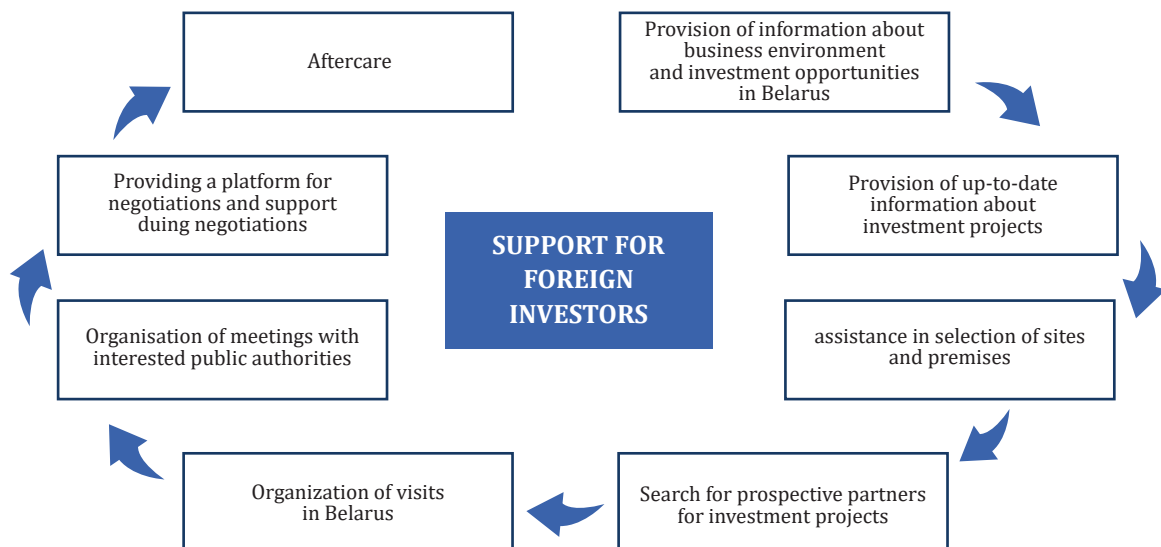
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