



# Tourism sector in the Republic of Belarus



NATIONAL AGENCY OF  
INVESTMENT AND PRIVATIZATION  
REPUBLIC OF BELARUS

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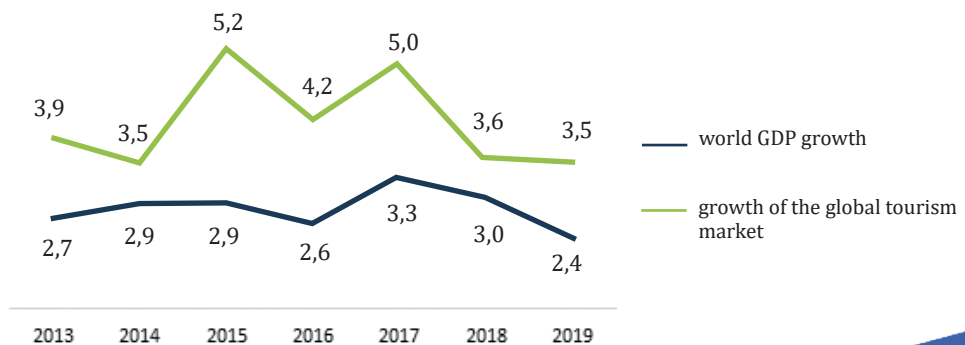
# 1. General characteristics of the industry and its most important indicators

## 1.1 Main economic indicators and industry trends



According to the World Tourism Organization (UNWTO), the tourism industry is the third largest export sector of the world economy, creating every 10th job. Tourism is also one of the main drivers of economic growth.

Over the past 7 years, since 2013, the annual growth of the global tourism market has exceeded the growth of the global economy. The tourism sector is expected to be the main contributor to the post-pandemic economic recovery.

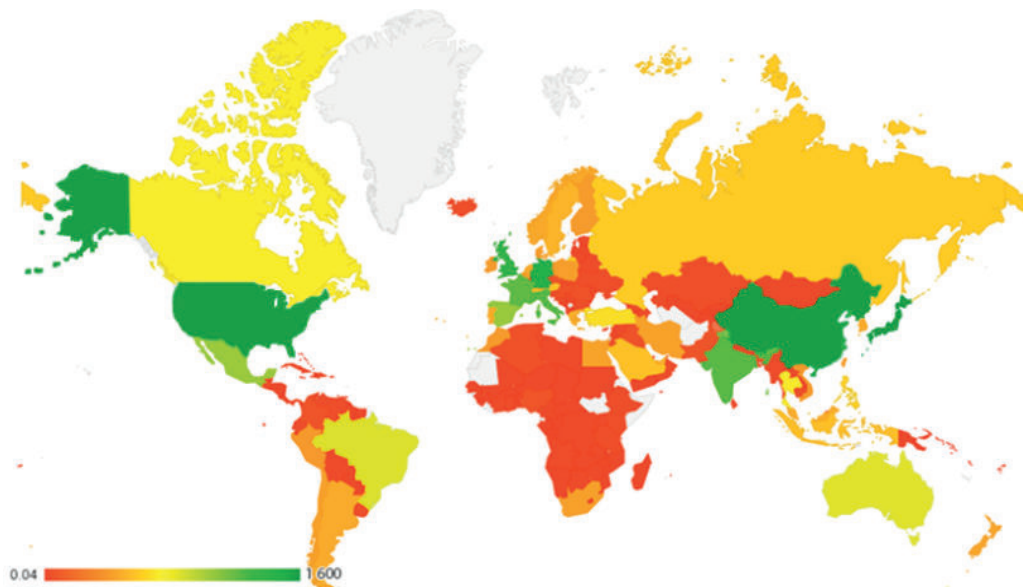


Dynamics of the global tourism sector and global GDP

### International tourism income, 2019. Country rankings:

Rank	Country	Aggregate income of the tourism sector, billion U.S. dollars.	Share in the total income of world tourism, %
1	USA	1 667.7	20.2%
2	China	1 580.8	19.1%
3	Japan	390.9	4.7%
4	Germany	353.1	4.3%
5	United Kingdom	323.1	3.9%
18	Russia	81.8	0.99%
42	Poland	28.2	0.3%
81	Ukraine	7.1	0.09%
<b>97</b>	<b>Belarus</b>	<b>3.9</b>	<b>0.047%</b>
107	Latvia	3.0	0.036%
108	Lithuania	2.7	0.033%

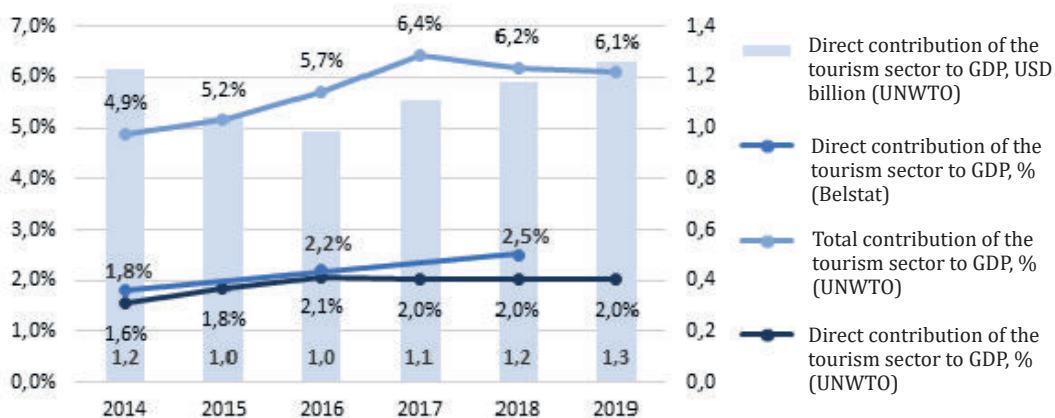
According to the World Travel & Tourism Council (WTTC) in 2019, the total contribution of the global tourism sector to the world GDP increased by 3.5% compared to the previous year and exceeded 8.2 trillion US dollars or 10.3% of the world GDP. The United States, China, Japan, Germany and the United Kingdom were among the top five countries to generate revenues of the global tourism industry. Their combined share accounted for more than 52% of the world tourism revenues. The share of the Republic of Belarus in the total income of the global tourism sector in 2019 was 0.047%.



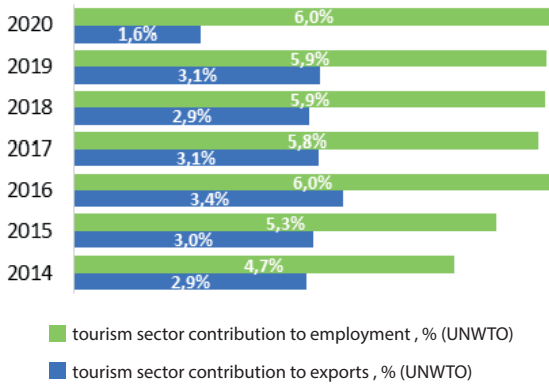
Total income of the tourism industry by country, billion U.S. dollars

According to the National Statistical Committee of the Republic of Belarus, the direct contribution of the tourism sector to the country's economy increased steadily throughout 2014-2018 and reached 2.5% of GDP in 2018. However, according to UNWTO statistics, in 2018 the direct contribution of the tourism industry of the Republic of Belarus to GDP exceeded \$1.2 billion and was equal to approximately 2% of GDP, and the total contribution, which additionally includes government spending and capital expenditure of other sectors allocated to the tourism infrastructure of Belarus, was more than 6% of GDP.

**The contribution of tourism to the economy of Belarus**



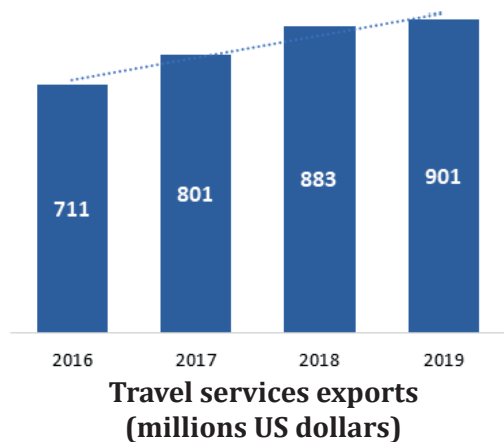
In Belarus, the sphere of tourism industry is significant in terms of its contribution to the country's economy in the form of creation of gross added value, in particular the formation of tourism consumption, supply of goods and services in the tourism sector, as well as providing employment in the tourism sector.



### Contribution of the tourism sector to employment and the economy of the country (%)

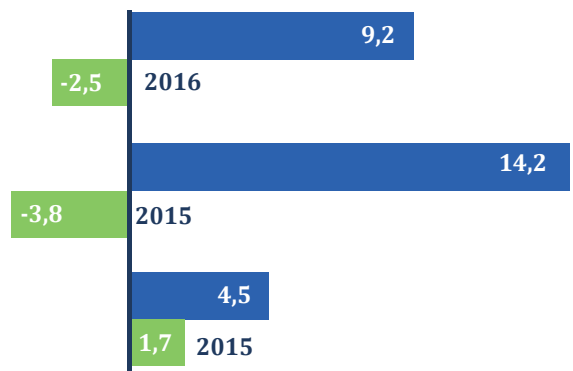
In particular, the domestic tourism sector is increasing exports of services at the expense of transport services for foreign tourists. Based on balance of payments data, travel services exports exceeded \$900 million in 2019.

In addition, the tourism sector makes a significant contribution to total employment and exports. In 2020, there were over 250 thousand jobs in the recreation and tourism sector (6% of total employment). The contribution of the Belarusian tourism industry to total exports of goods and services according to UNWTO statistics was 3.1% in 2019.



### Contribution of the tourism sector to employment and the economy of the country (%)

■ Growth in the contribution of tourism to GDP, %    ■ GDP growth, %



## 1.2 Key tourist attractions

The Republic of Belarus is an amazing country in the heart of Europe, which has its own unique features.



Belarus took 8th place in the Best in Travel-2019 list.

The British newspaper Independent in 2019 recommended its readers to visit the capital of Belarus among other European cities.



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

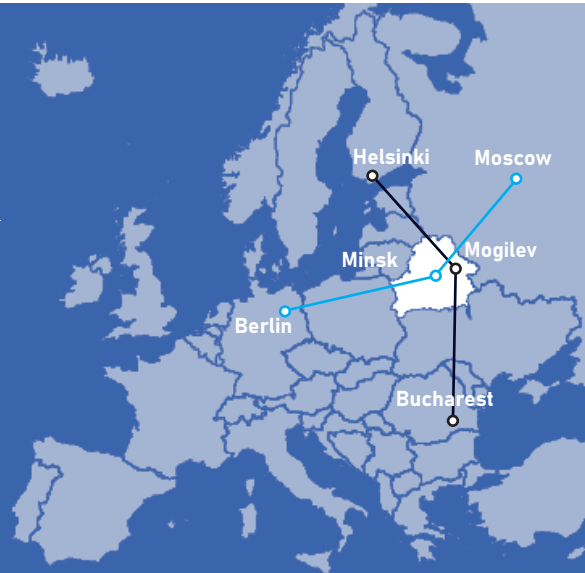
Bordering on 5 states, at the junction of the European and Eurasian regions, Belarus has acquired its own unique **national flavor**:

- picturesque nature and unique landscape,
- historical sites and cultural monuments,
- unique folklore and folk art,
- exquisite national cuisine,
- original rituals and traditions passing from generation to generation.

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.





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.

According to the National Geographic, Belovezhskaya Pushcha is one of the top 25 places to travel to in 2020.

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.

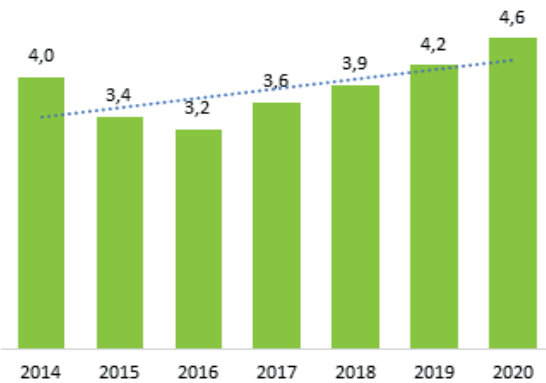
In Belarus, there are 483 health resort and health-improving organizations, 609 hospital organizations, 1,432 outpatient polyclinic organizations, 17 republican and Minsk scientific and practical centers, whose services in 2020 were used by about 160 thousand foreigners from 144 countries.

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 Value chains in the tourism industry

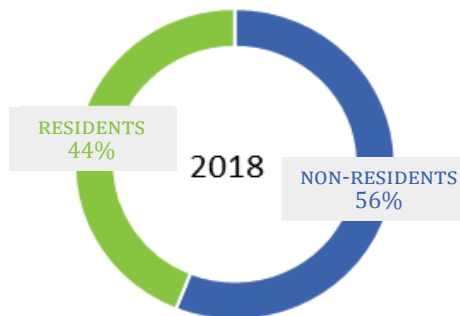
The formation of added value in tourism is associated both with the provision of typical tourist services and with the production of related services. It is determined by the total value added created by all sectors of the economy as a result of tourism consumption.



**Domestic tourism consumption,  
billion U.S. dollars**

Domestic tourism consumption is the total amount of money spent by tourists (residents and non-residents) to purchase goods and services for personal consumption during a tourist trip.

According to WTTC, since 2016, tourism consumption within the country has grown steadily, increasing by 44% over the past five years from \$3.2 billion to \$4.6 billion.

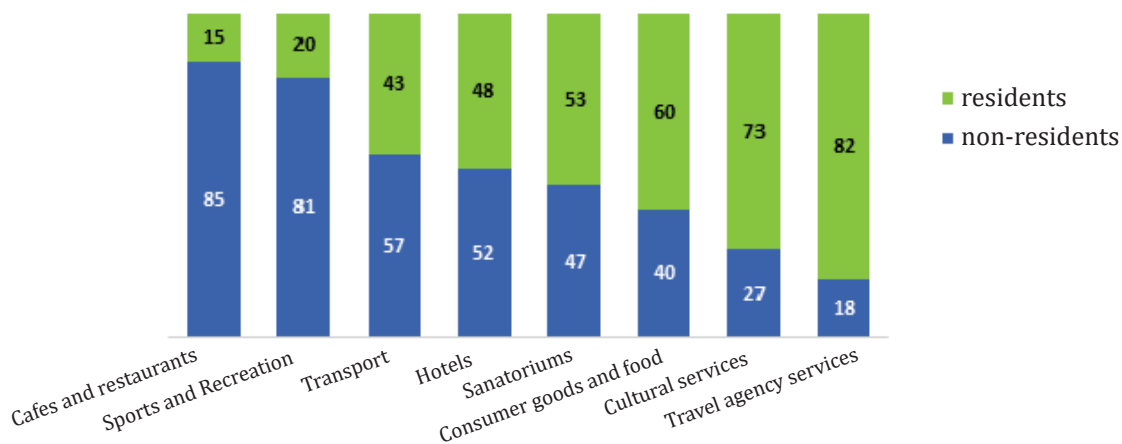


**Structure of tourist consumption**

According to the official statistics, about 56% of the volume of tourist consumption is accounted for by non-resident tourists.

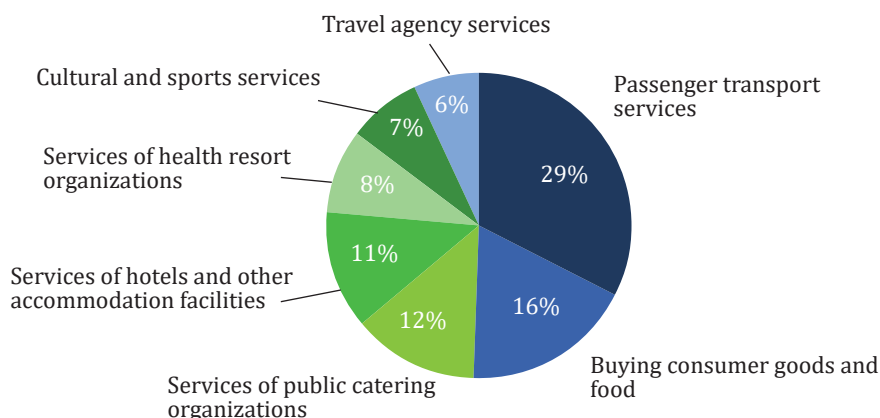
The decomposition of tourist consumption is as follows: the largest share is occupied by transport services (29%), food and consumer goods (16%), as well as spending on cafes and restaurants (12%).

### Structure of tourist consumption by residents and non-residents (%)



Analyzing the structure of tourist expenditures in the context of residents and non-residents, it should be noted that non-resident tourists are the main consumers of catering services (85%), recreation and sports (81%), and transport services (57%), while domestic tourists predominate foreign tourists in the consumption of travel agencies, cultural and art services, and food products during the tourist trip (60%).

### The structure of tourist consumption within the country by individual types of tourist products, 2018 (in % of the total)



## 1.4 Human resources

### Leading educational institutions for training personnel in the field of tourism

University	Speciality	Admission plan for 2021, people
Belarusian State University	Faculty of International Relations International Tourism Management	50
Belarusian State Economic University	Faculty of Commerce and Tourism Industry Department of Economics and Tourism Industry Management Faculty "Higher School of Tourism"	195
Belarusian State University of Physical Education	Faculty of Sports, Tourism and Hospitality Management	189
Yanka Kupala State University of Grodno	Faculty of History, Communication and Tourism Specialty "Tourism and Hospitality"	47
Brest State A. S. Pushkin university	Faculty of Geography Specialty "Tourism and hospitality"	52
Vitebsk State University named after P.M. Masherov	Faculty of Humanities and Language Communication. Museum business and protection of historical and cultural heritage (Cultural heritage and tourism)	20
<b>Total universities</b>		<b>553</b>



Belarusian State University has entered the top 25 universities in the developing Europe and Central Asia region in the QS EECA University Rankings

Belarusian State University electronic library ranks 3rd in the world according to the "Transparent Ranking of Repositories"

Secondary educational institution	Speciality	Admission plan for 2021, people
The branch of "Industrial-pedagogical college" educational institution "Republican Institute of professional education"	Specialty "Tourism and Hospitality"	80
Minsk College of Business	Specialty "Tourism and Hospitality"	95
the Pinsk College of the educational institution "Brest State A. Pushkin University"	Specialty "Tourism and Hospitality"	25
Polotsk college "Vitebsk State University after the name of P.M. Masherov"	Specialty "Tourism and Hospitality"	15
<b>Total</b>		215

Duly provision of qualified personnel is necessary to render excursion and other tourism services at a high level and competitive quality, as well as to develop new and upgrade the existing tourist products.

Today, 20 higher and 8 secondary educational institutions are training personnel in the field of tourism in Belarus. The total graduation of specialists is about 2 thousand people.

In addition, in order to maintain a high level of provision of excursion services in the Republic of Belarus, professional certification of guides and guides-translators is carried out. In 2020, there were over 1,000 certified specialists in the country.





## 1.5 Legal environment and public policy

The main legislative act regulating the sphere of tourism in the Republic of Belarus is the Law of the Republic of Belarus No. 326-Z of November 25, 1999, "On tourism". The state actively takes measures for the development of domestic tourism, especially domestic and inbound tourism. The provided preferences actively attract entrepreneurs to the tourist industry, as well as contribute to the development of investment activity in the sector.

### Regulatory legal acts in the field of tourism:

- **the Law of the Republic of Belarus No. 326-Z of November 25, 1999, "On tourism"**

Determines the priority areas of state regulation in the field of tourism

- **the Tax Code of the Republic of Belarus (paragraph 1.32, item 1, article 118)**

Provides for VAT exemption on sales of tourist services

- **the Decree of the President of the Republic of Belarus No. 371 of June 2, 2006 "On certain measures of state support for the development of tourism in the Republic of Belarus"**

Introduces guarantees for investors against nationalization of their contributions to the creation of tourist infrastructure

- **the Decree of the President of the Republic of Belarus No. 372 of June 2, 2006 "On measures for the development of agroecotourism in the Republic of Belarus"**

- **the Decree of the President of the Republic of Belarus No. 365 of October 9, 2017 "On the development of agroecotourism"**

Defines the legal regime and introduces benefits and preferences for investors in the field of agroecotourism, including preferential financing

- **the Decree of the President of the Republic of Belarus of May 15, 2008 No. 270 "On measures on development of roadside service"**

Introduces incentives and preferences for investments in roadside service facilities, including access to concessional financing

- **the Decree of the President of the Republic of Belarus No 6 of May 7, 2012 "On Stimulating Entrepreneurial Activity in the Territory of Middle, Small Urban Settlements, Rural Area."**

Defines incentive measures, including exemption from a number of taxes for the period up to 2022 in trade, catering and the provision of consumer services in rural areas and small urban settlements

- **the Decree of the President of the Republic of Belarus of May 26, 2011 No. 220 "On the establishment of a special tourist and recreational park "Augustow Canal"**

- **Enactment of the Council of Ministers of August 22, 2011 № 1115 (ed. on 25.10.2011) "On some matters of the activity of special tourist and recreational park "Augustow Canal"**

Creation of a special legal regime, with current benefits and preferences for the tourist and recreational park "Augustow Canal"

- **the Decree of the President of the Republic of Belarus of January 9, 2017 No. 8 "On the introduction of the visa-free entry and departure for foreign citizens"**

- **the Decree of the President of the Republic of Belarus of August 7, 2019 No. 300 "About establishment of visa-free procedure for entrance and departure of foreign citizens"**

Introduces a visa-free regime - through the National Airport Minsk for up to 30 days for citizens of 74 states, as well as visiting the visa-free territory "Brest-Grodno" for up to 15 days

- **the Law No. 105-3 of 4 January 2010 "On Legal Status of Foreign Citizens and Stateless Persons in the Republic of Belarus"**

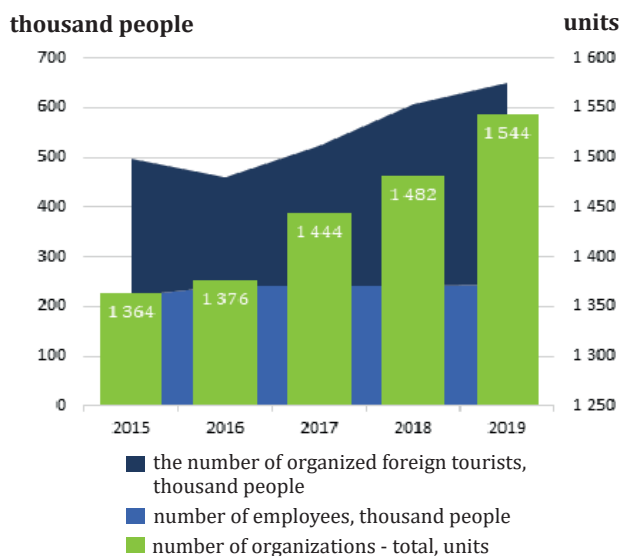
Defines the legal status of foreign citizens, in particular introduces a rule according to which foreign citizens may stay on the territory of the Republic of Belarus without registration for 10 days

- **the Resolution of the Council of Ministers of the Republic of Belarus on January 29, 2021 N 58 "On the State Program" Hospitable Belarus "**

Approves the State Program "Hospitable Belarus" for 2021 - 2025

## 2. The Belarusian market of tourist services overview

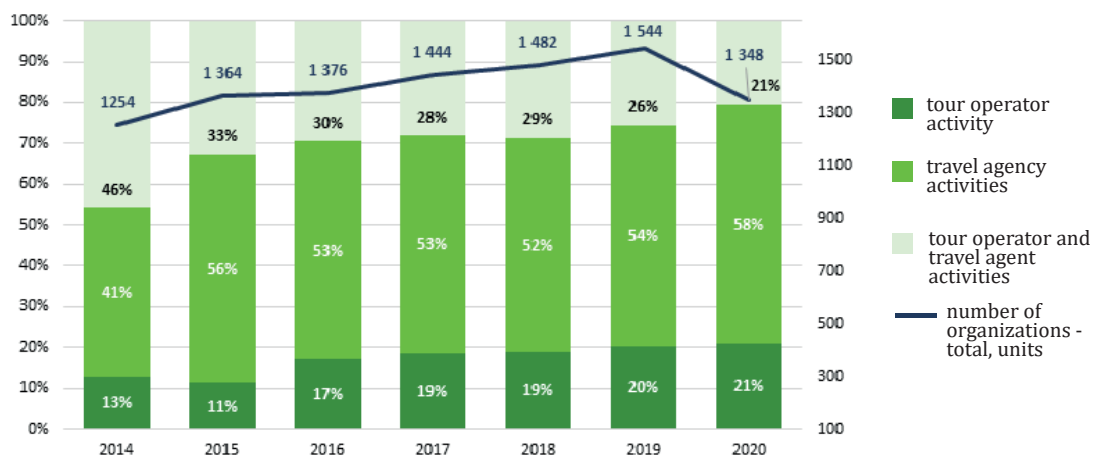
### 2.1 Key operating indicators



The growth in the number of organized foreign tourists to Belarus has led to an increase in the number of travel companies and employees involved in the tourism sector.

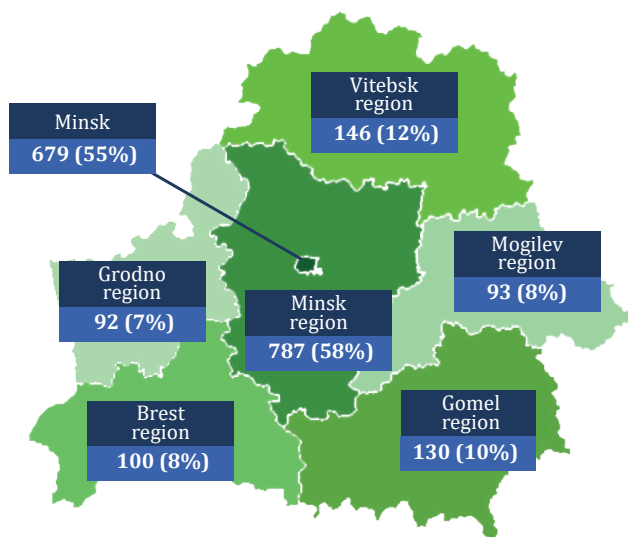
As of 2020, the tourism market in Belarus is represented by 1,348 organizations that provide tourism services, with 3,865 employees.

### Quantitative indicators of the activities of companies in the tourism industry



The number and structure of travel companies in Belarus, 2014-2020

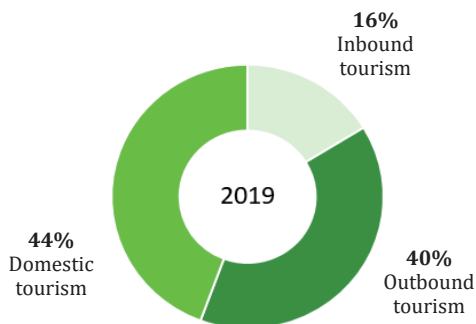
By 2020, the number of travel companies in Belarus had been steadily increasing by an average of 3.5% per year, reaching the maximum of 1564 companies in 2019. In 2020, there was a decrease in the number of market participants as a result of tourist restrictions due to the coronavirus pandemic. Over the past 7 years, there have also been certain structural changes in the composition of market entities: since 2014, the share of companies engaged exclusively in travel agency and tour operator activities has increased and in 2020 the share amounted to 58% and 21%, respectively, while the share of companies providing both travel agency and tour operator activity decreased from 46% in 2014 to 21% in 2020.



**Distribution of travel agencies by regions**

Based on the geographical distribution of travel companies, most of them are concentrated in the Minsk region (58% of all subjects), with the city of Minsk individually accounts for about 55% of companies in the industry.

The distribution of organised tourist flows between the pre-pandemic segments suggests a numerical predominance of domestic-oriented tourists - 44%. There is also a significant share of tourists travelling abroad - 40%. Inbound tourism accounts for only 16% of organised tourists.



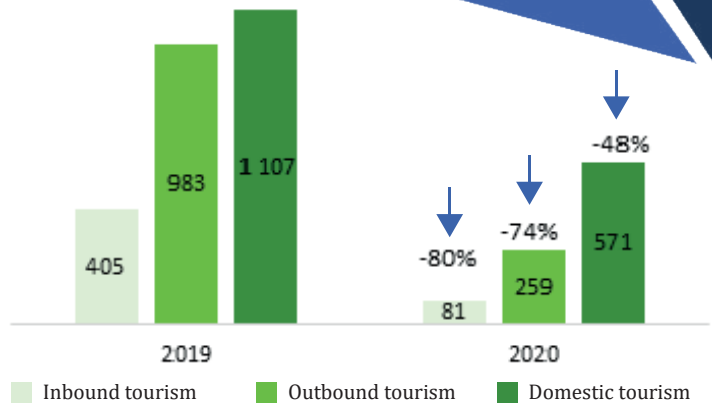
**Organised tourism flows in 2019**

**80 972**

Number of organised foreign tourists to Belarus in 2020

**572 493**

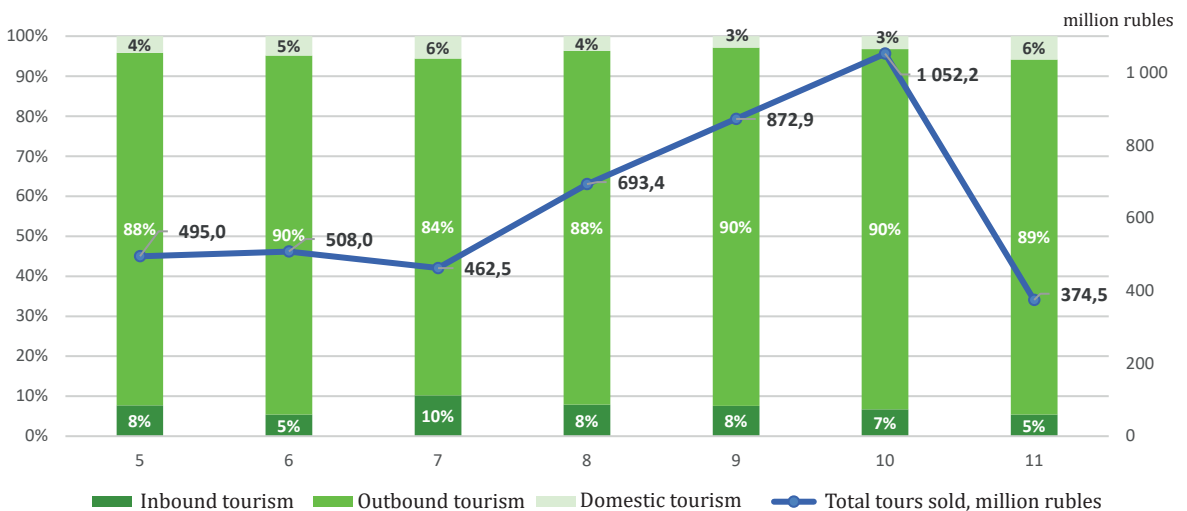
Number of organised domestic tourists to Belarus in 2020



**Number of organised tourists in 2019-2020, thousand people**

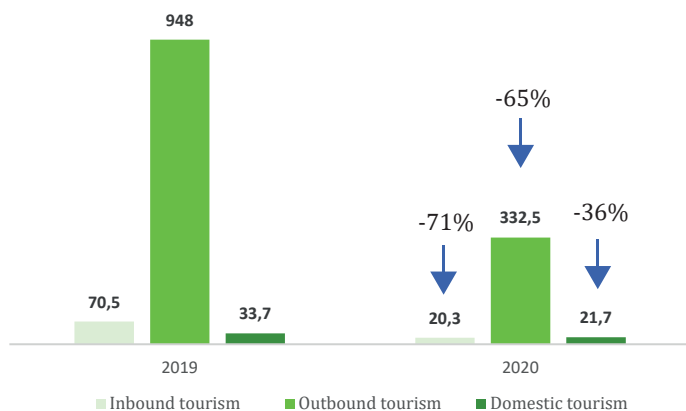
The pandemic of 2020 had a devastating effect on the tourism sector: the number of organized foreign tourists who visited Belarus decreased by 324 thousand (-80%), the number of citizens who went abroad on tours decreased by 536 thousand (-74%), while the number of domestic tourist flows almost halved.

Along with the decrease in the number of tourists, the sales of tours significantly decreased.

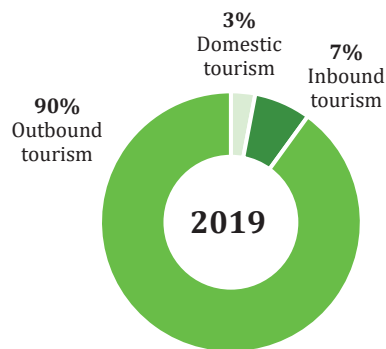


**Sales of tours by segments in 2014-2020**

From 2016 to 2019, tour sales grew rapidly by about 22% per year, peaking at 1.05 billion rubles. However, in 2020 sales fell sharply by more than 64% relative to 2019 due to the coronavirus pandemic and, as a consequence, domestic travel companies sold tours worth only 374 million rubles, which is the lowest amount since 2014.



**Sales of tours by segment in 2019-2020, million rubles**



**Tour sales by segment in 2019**

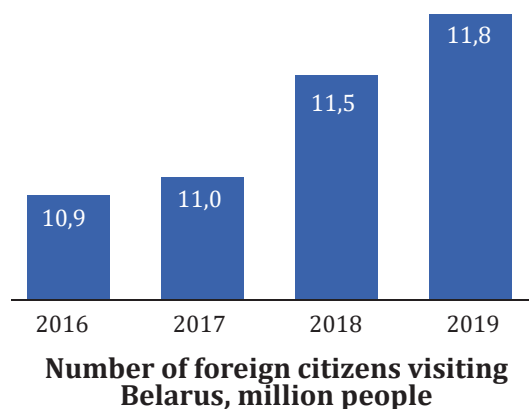
At the same time, sales of inbound tourism tours decreased by 71%, outbound – by 65%, and domestic – by 36%. The largest drop in sales in inbound and outbound tourism is due to the closure of borders during the epidemic.

Analysing the structure of tours sold by main segments, it can be concluded that about 90% of the tours sold come from outbound tourism. In 2020, the structure of tour sales changed slightly: compared to 2019, the share of tourist trips sold within Belarus increased from 3% to 6%, against a decrease in the share of sales related to inbound and outbound tourism. These structural changes in 2020 are attributed to reduced inbound and outbound tourism flows due to border closures caused by the pandemic.

It can be concluded that there is a significant potential for the development of inbound and domestic tourism segments, as evidenced by both a small share of tourist flows in these segments and relatively low tour sales.

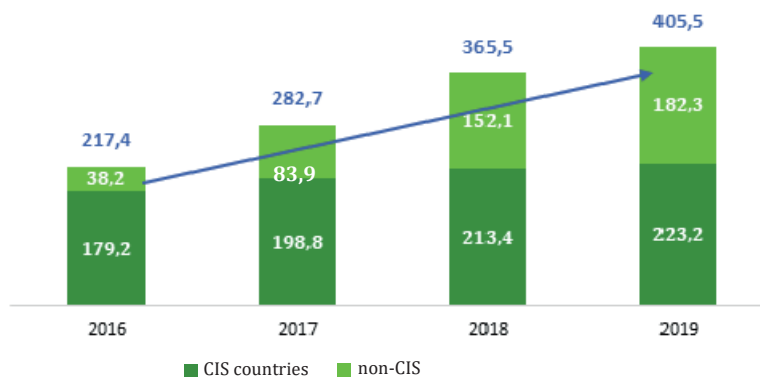
## 2.2 Characteristics of tourists in Belarus

Over the past four years before 2020, the number of tourist trips of foreign citizens to the Republic of Belarus has been characterized by a stable growth of approximately 2% per year (CAGR).



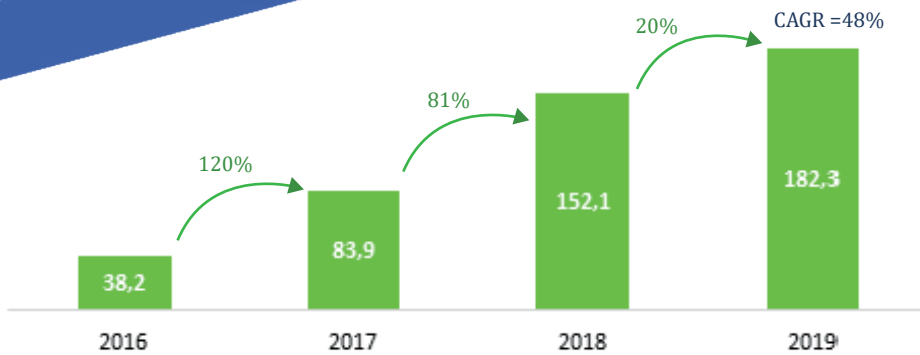
According to the National Statistical Committee, over 11 million foreign citizens visited Belarus annually since 2017.

However, the number of organised foreign tourists to Belarus during this period grew at a faster rate of 17% per annum (CAGR).



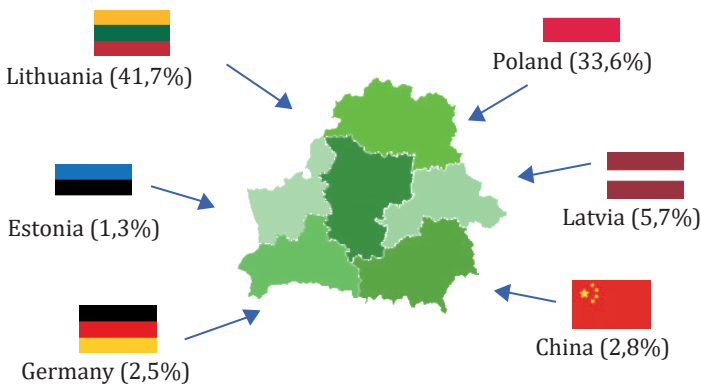
The CIS countries account for 76% of foreign tourists, visiting Belarus, of which 95% are Russian tourists.

A particularly noticeable increase was observed among organized tourists to the Republic of Belarus from countries outside the CIS, the number of which increased from 38.2 thousand in 2016 to 182.3 thousand in 2019.



### Dynamics of organized tourist flows from countries outside the CIS, (thousand people)

This phenomenon was largely facilitated by the introduction of a visa-free regime for citizens from 74 countries, with the possibility of staying in Belarus for up to 30 days.



### Country structure of organized foreign tourists to Belarus in 2019

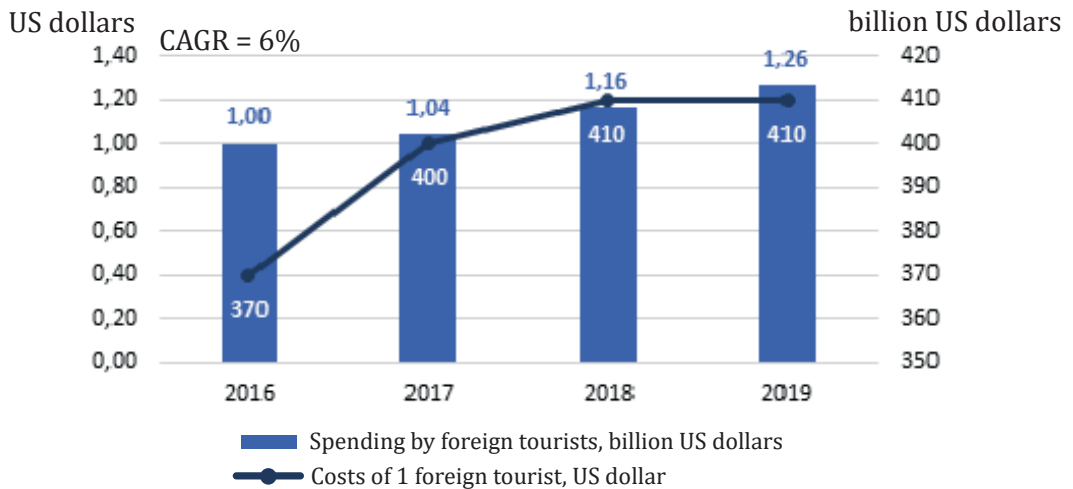
### Average duration of stay of foreign tourists in Belarus in 2020



The leaders of countries outside the CIS in terms of the number of tourists who visited Belarus in 2019 are the Baltic countries, Poland, China and Germany.

The average duration of stay of foreign guests from the CIS in Belarus is 6 days, and from the European Union - 5 days.



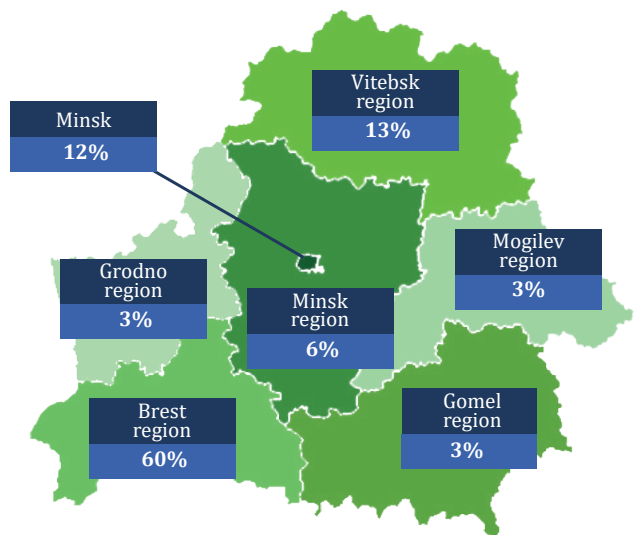


### Expenses of foreign tourists in Belarus

Along with the growth in the number of arriving foreign guests, their expenses within the country also increase (the growth rate in the period from 2016 to 2019 was 6% per year). Thus, according to the UNWTO, in 2019, foreign citizens spent 1.26 billion US dollars in Belarus, or approximately \$410 per foreign tourist.

The number of organized tourists traveling within the country in recent years before the pandemic steadily exceeded 1 million people (in 2020 - 570 thousand people).

In 2020, the most popular tourist routes among citizens fell on the Brest and Vitebsk regions, as well as the city of Minsk, which were visited by 60%, 13% and 12% of domestic tourists, respectively.



Distribution of domestic tourist flow by regions in 2020

## 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 about 60 monuments of art, 2 thousand monuments of architecture and archeology. More than 5,500 historical and cultural treasures are stored in 160 museums, which had 7.1 million visitors in 2019. The country's architectural heritage is represented by a number of historic buildings and structures, ranging from 11th century Byzantine style to post-war Stalinist Empire architecture.

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

426 thousand visits in 2019  
Cost of visit: \$0.79 - \$5.75



#### Mir Castle complex (XVI century)

330 thousand visits in 2019  
Cost of visit: \$1.6 - \$6.3

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

110.5 thousand visits in 2018  
Cost of visit: 2.80\$ - 5.60\$



Belarus is a country rich in folk craftsmen and talented artisans. Many traditional crafts have survived to this day, such as blacksmithing, weaving, straw weaving, pottery and many others.

In 2020, there were over 42,000 artisans in total in Belarus.

There are 2 ethnographic museums in the country. The most famous is the museum complex of ancient folk crafts and technologies "Dudutki".

## **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"**

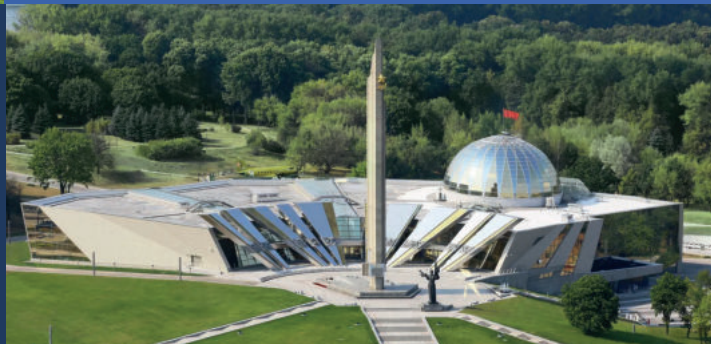
470 thousand visits in 2019

Cost of visit: \$1.2-17.7

### **Belarusian State Museum of the History of the Great Patriotic War**

577.9 thousand visits in 2019

Cost of visit: \$1.2-3.5



### **Historical and Cultural Complex "Stalin line"**

Cost of visit: \$2.80 - \$5.60



## 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

143 thousand visitors  
(during January-May 2019)  
Cost of visit: \$2.8-5.9



### Braslav Lakes National Park

Rest cost: from \$50/day



### Reserve "Olman swamps"

Cost of visit: \$30-100



## 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 47th among 152 countries in the manufacturing competitiveness index (2018).

The Belarusian Automobile Plant, founded in 1948, produces every third mining dump truck in the world. The largest dump truck in the world (over 503 tons of load capacity) was created there and was listed in the Guinness Book of Records.



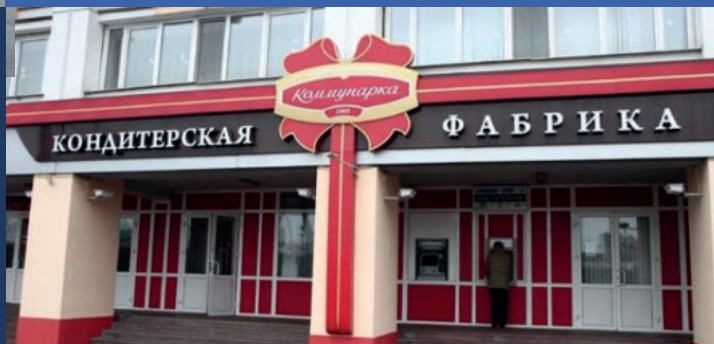
### Belarusian Automobile Plant

has been visited by over 117,000 tourists in five years

Cost of visit: \$19.7-23.6

### Kommunarka Confectionery Factory

Cost of visit: \$5.9



### Soligorsk Salt Mine

Cost of visit: \$28.0



## Religious tourism

The Republic of Belarus is a multi-confessional state. 25 religious denominations and trends are registered here. The total number of religious organizations is 3.6 thousand units.

There are 2.8 thousand operating religious buildings, as well as 205 under construction. Pilgrims from all over the world flock to Belarus to perform religious rites and touch the shrines.



**Zhirovichi Monastery**



**Saint Sophia Cathedral in Polotsk**  
(listed by UNESCO)

## Agri-ecotourism

Today, almost 3,000 agro-ecological farmsteads located in picturesque corners of Belarus host the visitors to the country. Agro-farms served 433.3 thousand tourists in 2020. The cost of accommodation in agro-farms starts at \$9.84/day.

The Republic of Belarus took **1st place** in the category "Agritourism" of the National Geographic Traveler Awards in 2016 and 2018.



## Medical and health tourism

There are 483 health resorts and recreational organisations in Belarus, which accommodated 629,000 people in 2020. Approximate cost of accommodation in a 2-bed standard room with meals and procedures for foreign citizens starts from 30 euros per day per 1 person.

## Medical tourism

Foreigners appreciate the quality of Belarusian medicine. In 2020, 160 thousand foreigners from 144 countries used medical services in Belarus.

609 hospital organisations, 1,432 outpatient and polyclinic organisations, 17 republican and Minsk scientific and practical centres offer services for foreign citizens.

Belarus entered the TOP-50 effective healthcare systems according to the Global Health Security Ranking



## Hunting tourism

The country is endowed with favourable natural conditions and rich biodiversity for the development of hunting tourism. The area of Belarusian hunting grounds is 17.1 million hectares, on which 203 hunting farms are registered. In 2018, revenues from foreign hunting tourism in the republic amounted to \$4.2 million.

In 2020, more than 2,000 hunting tourism vouchers were sold through the online system.

The cost of organising a hunt is on average €80/day.



## Event tourism

### 1. Cultural

There are 29 theaters in Belarus which were visited by 1.8 million people in 2019. The cost of visiting depends on the performance and varies from \$2.17 to \$59.06.

For example, to see the Swan Lake at the National Academic Bolshoi Opera and Ballet Theatre will cost up to \$60 (this theatre had 254,300 visitors in 2019). And it will cost up to \$10 to see Romeo and Juliet at the Belarusian State Academic Musical Theatre (the theatre had 135,600 visits in 2019).

There are 90 cinemas in Belarus, which were visited by over 9 million people in 2019, which is 6% more than the year before. The ticket price is about \$6 and up to \$12 if one chooses more comfortable and secluded halls.

Numerous festivals with different cultural themes add variety and richness to the country's cultural life. About 125 festivals take place each year, including an international festival of fireworks and a vintage car and motorbike rally.



#### International Festival of Arts "Slavianski Bazaar" in Vitebsk

In 2021, the festival was attended by more than 73 thousand spectators, and over 5 thousand contestants from 32 countries of the world took part in it.

Cost of visit: \$13.78 to \$35.43 (2021)

#### Minsk International Film Festival "Listapad"

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

Cost of visit: from \$2.36 to \$3.94 (in 2020)





## Event tourism

### 2. Sports

Sports events form about 40% of the event market in Belarus. About 80 international competitions are held annually on the territory of the republic.

There are more than 23 thousand sports facilities in Belarus. About 22 thousand mass sports events are held annually in the country, the number of their participants, including foreign ones, is growing.

Some of the biggest 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 2019, 12 teams from different countries took part in the tournament. About 50 thousand people visited the tournament in the debut competitions.

Cost of visit: 1.97\$



**Minsk Half Marathon** is the largest running event in Belarus.

In 2019, 40 thousand people took part in it, and the prize fund amounted to 60 thousand US dollars.

Cost of visit:  
from \$7.09 to \$39.37 (in 2021, the cost depends on the length of the distance)



**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.

Thirteen golf tournaments were held in 2021. For the first time ever, Belarus took part in the World Amateur Golf Championship in the **Golf Cup Dubai 2021**.

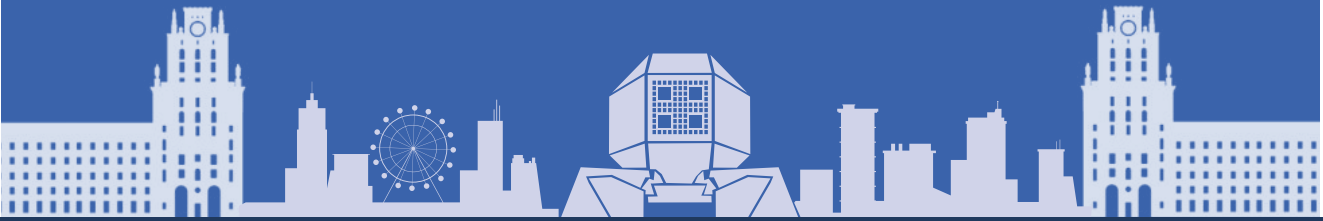


**The Belarus Sailing Championship** brings together yachtsmen from all the regions of the country every year. On average, 170 participants take part. In total, there are about 5 yacht clubs in Belarus.

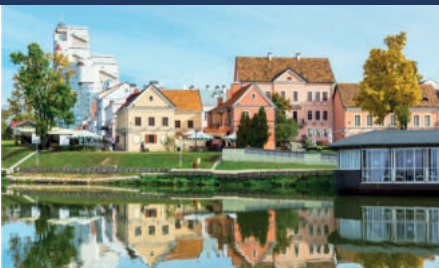
The winners are given the opportunity to represent Belarus at international competitions.



# The most popular attractions in Belarus visited by foreign tourists



## Minsk



Trinity Suburb

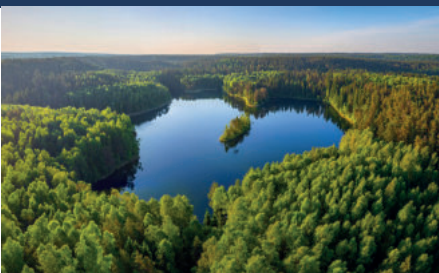


National Academic Bolshoi Opera and Ballet Theatre



National Library of Belarus

## Minsk region



National park Narochansky

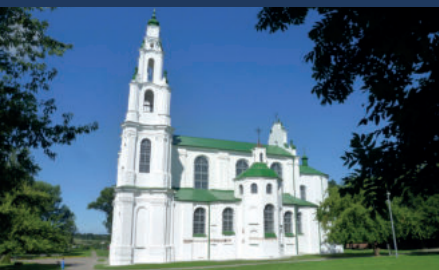


Historical and cultural museum-reserve «Zaslavl»

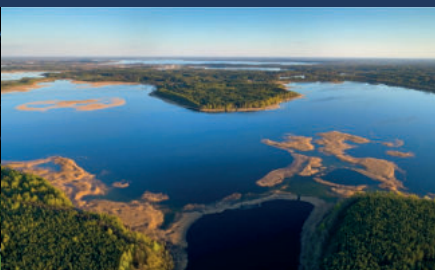


Museum of ancient folk crafts and Technologies

## Vitebsk region



Saint Sophia Cathedral in Polotsk



Braslaw Lakes



Summer Amphitheatre

## Grogno 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

## Brest region



Brest Hero Fortress Memorial

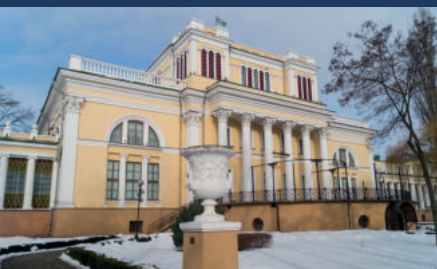


Belaya vezha



Belovezhskaya Pushcha  
National Park

## Gomel region



Gomel Palace and  
Park ensemble



Manor of Lieutenant General M.  
Gatovsky



Pripyatsky  
National Park

## 3. Investment potential and development prospects

### 3.1 Characteristics of infrastructure facilities

Belarus has a well-developed and modern tourist infrastructure capable of satisfying a wide range of tourists' needs at a high level. Every year the country renews and creates new tourist facilities for comfortable accommodation and pastime of tourists.



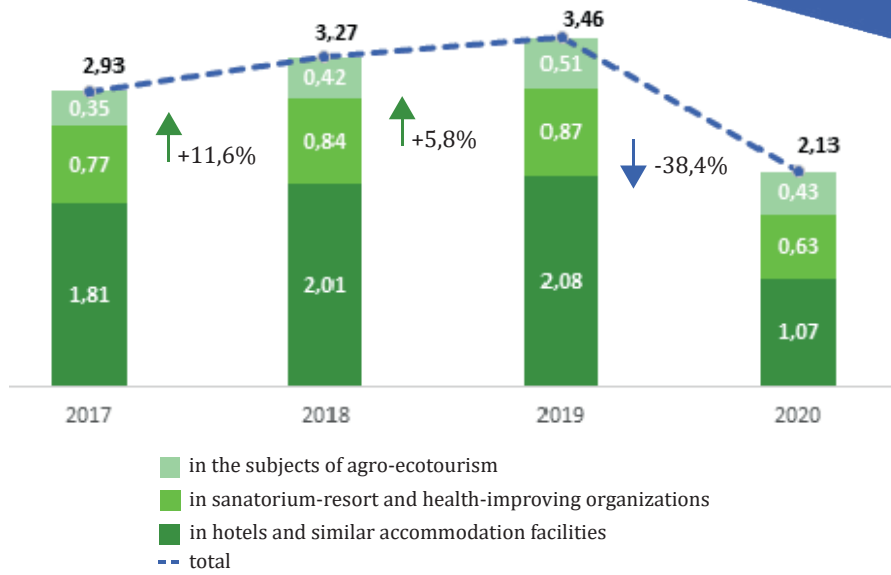
#### Collective accommodation facilities, units

In 2020, there were 1,096 collective accommodation facilities in the republic, which is 4% more than in 2016. Of these, 483 were sanatoriums and health resorts, and 613 were hotels and similar accommodation facilities. The room stock amounted to 40,658 units.

Among the hotel stock in 2020, there are 32 hotels with a category of three stars, 7 - four stars, 4 - five stars.

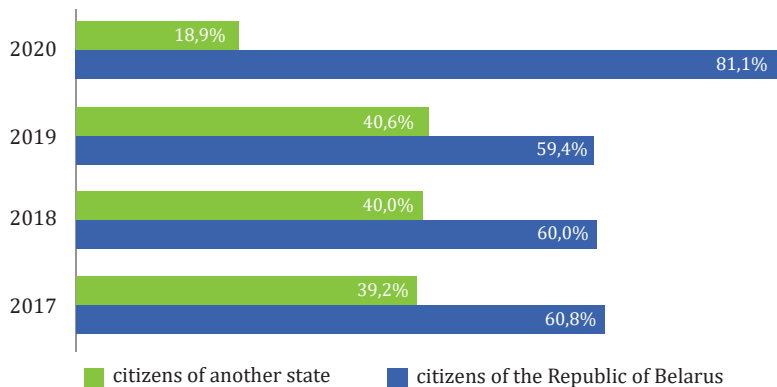


Number of hotels by category countrywide in 2020



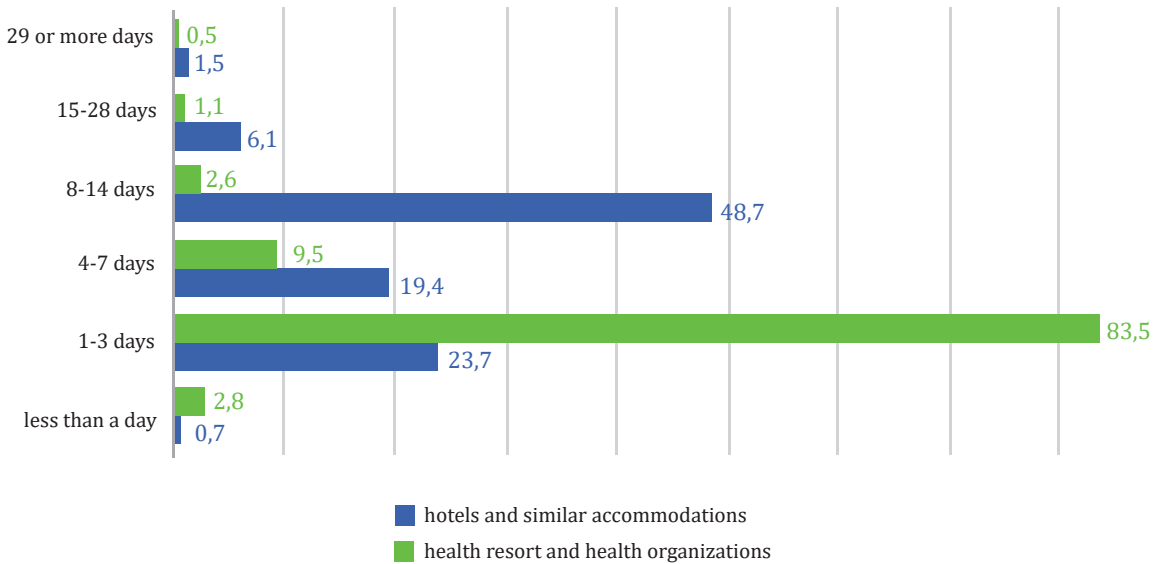
### Number of guests (million people)

The number of persons accommodated increases every year, excluding the situation in 2020, where only 2.13 million persons were served in hotels, health resorts and recreational facilities, as well as by agro-ecotourism entities.



### Ratio of residents to non-residents in accommodation facilities (%)

Among the guests of accommodation facilities, the share of foreigners before the pandemic was about 40%, but in 2020 their share dropped to 19%.



### Dynamics of the time spent by foreign tourists in sanatoriums and hotels (%), 2020



The most important component of the tourism infrastructure is the objects of agroecotourism, the number of which reached 2,936 units in 2020.

### Dynamics of the number of subjects of agritourism and tourists

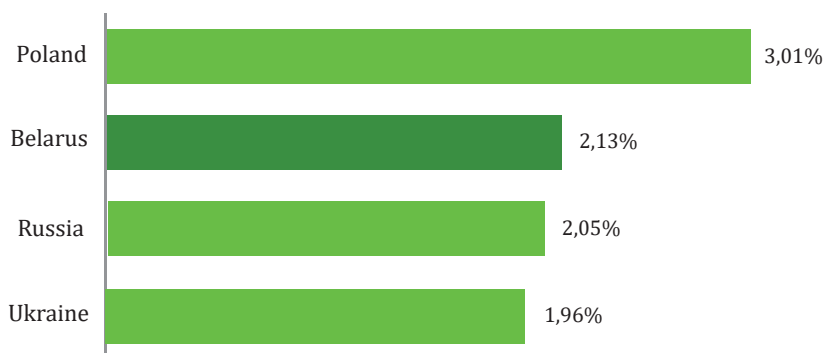
At the same time as the number of agri-businesses is increasing, the number of their guests has skyrocketed by 14% a year over the last 4 years before the pandemic, exceeding 514 000 in 2019.

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

### 3.2 Investments in the tourism sector

During 2016 - 2018, the tourism sector in Belarus had been increasing its capital investment dynamics. According to the World Bank in 2018, capital expenditures in the Belarusian tourism infrastructure exceeded USD 335 million and amounted to 2.13% of the country's total exports.

In terms of capital expenditure in tourism, expressed as a percentage of exports, Belarus holds up well compared to its neighbours.



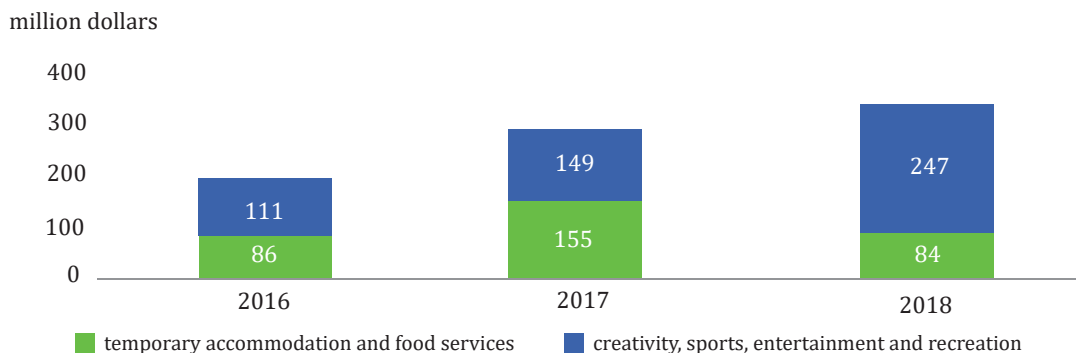
Capital investment in tourism in 2018 (% of exports)



Investments in fixed capital of the tourism sector of Belarus in 2016-2023(WTTC)



In the structure of capital expenditures of the tourism sector of Belarus, the volume of investments in fixed assets by types of activity "Services for temporary accommodation and food" and "Creativity, sports, entertainment and recreation" in 2018 amounted to USD 84 million and USD 247 million or 25 % and 74% respectively. Thus, the capital costs in these two types of activities are the main components of the industry's investment.



**Capital investments in tourism (million dollars)**

Investments in the type of activity "Creativity, sports, entertainment and recreation" during 2016-2018 grew at a faster pace, having increased in 2018 by 123% compared to 2016. While the fall in investments in the type of activity "Services for temporary accommodation and meals" had amounted by less than 1% to 2016.

At the same time, UNWTO data illustrate a favourable forecast for capital investment in the tourism sector in Belarus in the near future, according to which capital expenditure in tourism in 2020-2023 will grow by 0.4% per year and reach USD 357.2 million by 2024. Consequently, capital expenditure on infrastructure is expected to increase, including the above-mentioned activities.



### 3.3 Prospects for the development of the sector

Assessing the current state of the tourism sector, attention should be drawn to the key milestones in the development of the sector that had been achieved by 2020.

Additional prerequisites for the further development of domestic tourism were created: the entry and residence procedures for foreign nationals from 74 countries were abolished, as was the registration procedure. A national Internet portal for the domestic tourism sector VETLIVA was also developed, which is a multifunctional online booking service and an extensive catalog of tourism services. Work has been done to increase interest in the Republic of Belarus as a tourist destination - the country has appeared at the top of global travel media rankings (The National Geographic Travel Awards, Best in Travel).

As a result, there was a positive pre-pandemic trend in the industry - there was a positive increase in tourism consumption and, as a consequence, in the contribution of tourism to GDP, employment and exports. Domestic tourism infrastructure increased the volume of investments in fixed assets. There was a tendency to increase inbound and domestic tourist flows.

At the same time, there are significant reserves for the sector to reach a new level of development, as well as to improve the position of the domestic tourism industry on the world stage.

In particular, the resource potential of domestic tourism is not fully exploited, which follows from the roughly equal ratio of domestic to outbound tourism flows. For instance, in 2019, the number of organised tourists and excursionists sent on domestic routes was 1.107 million, while the number of organised domestic tourists travelling abroad was 0.983 million. Thus, the ratio between domestic and outbound tourism in 2019 was 1.13:1, whereas the recommended proportion, according to the UNWTO, should be around 4:1.

In 2020, Belarus enacted the National Strategy for the Development of Tourism in the Republic of Belarus until 2035, which determines further vectors and targets for the development of the domestic tourism sector.

Among the main strategic goals of Belarusian tourism development until 2035, defined by the document, are increasing the share of the Republic of Belarus in world tourism revenues from 0,04% in 2016 to 0,1%; entering the Republic of Belarus into the list of 100 sustainable tourism destinations and 50 countries with the highest index of competitiveness in travel and tourism (Travel & Tourism Competitiveness Index), as well as bringing the total annual export volume of international tourism services and passenger transportation up to 3 billion US dollars.

#### **Strategic goals for the development of domestic tourism until 2035:**

- increase in the share of Belarus in world tourism revenues to 0.1%
- Belarus' inclusion in the top 50 countries in the Travel and Tourism Competitiveness Index 100 sustainable tourism destinations
- bringing the annual total volume of exports of international tourism and passenger transportation services to 3 billion US dollars

The realisation of these objectives creates a need for investment in the development and modernisation of the tourism infrastructure. At the same time, UNWTO data illustrate a favourable forecast for capital investment in the tourism sector of Belarus in the near future, according to which capital expenditures in tourism in 2020-2023 will grow by 0.4% per year and reach USD 357.2 million by 2024. Nevertheless, this amount of investment may not be sufficient to successfully compete and breakthrough domestic tourism development, hence more action is needed to stimulate tourism consumption, as well as to increase the investment attractiveness of the industry.

For example, the following initiatives could be highlighted as additional incentives to be considered and implemented in the short term:

- a mechanism to subsidize citizens when they consume tourism services, in particular the application of a tax deduction on citizens' income tax to all services provided by tourism industry organisations for domestic tourism trips;
- partial reimbursement of expenses to organizations, regardless of the form of ownership, organizing excursion tours for employees on domestic tourism routes;
- expanding the scope of the national VAT refund system Tax Free in order to increase the availability of Belarusian goods and stimulate their consumption by foreign tourists;
- a mechanism for financing infrastructure projects in tourism and recreation parks and tourism centres based on public-private partnerships.

In addition, digitalisation has been recognised as a current trend, including in the tourism industry. The introduction and use of information technology in tourism will help to create new tourism products and services, improve their quality and competitiveness, increase their accessibility, accelerate their turnover and, ultimately, increase sales.

Increasing competition in the global market of tourist services creates the need to design and apply new approaches to the organisation and development of tourism infrastructure. Global experience demonstrates the success of the cluster model in tourism.



**> 357\$ million**

The volume of capital investments in 2023 in tourism

**+ 0.4% per year**

Forecast of dynamics of capital investments in tourism

## 3.4 Main tourism clusters and investment proposals

### Cultural and historical cluster "Brest"



#### Location

Brest region  
Central part of Brest

#### 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.

#### 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.)





## 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 Zyabki, 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 Zyabki, 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)







### 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 Svyatoe** (greenfield)

## 4. Investment climate

### 4.1 Macro indicators

Indicators	2016	2017	2018	2019	2020
GDP of Belarus at current prices (billion US dollars)	47.8	54.6	59.7	63.1	60.3
Export of goods and services (billion dollars)	30.0	36.6	42.3	42.0	37.0
Export of services under the article "Travel" (million US dollars)	710.6	800.9	883.3	901.3	354.8
Number of tourist trips of foreign citizens to the Republic of Belarus (million trips)	10.9	11.1	11.5	11.8	3.6
Number of tourists and excursionists served (million)	1.72	2.0	2.2	2.5	0.9
Number of organizations engaged in tourism activities (thousand organizations)	1.4	1.4	1.5	1.54	1.4
Number of people employed in tourism (annual average), (thousand people)	242.8	242.0	255.6	257.8	251.9
Average monthly nominal salary of employees of organizations engaged in tourism (rubles)	656.0	719.7	784.9	875.1	1009.0
Revenue from the provision of tourism services (million rubles)	136.6	165.9	212.9	282.5	110.7

## 4.2 World rankings

Belarus occupies a worthy place in the world tourism arena, which is confirmed by the high positions of the country in international tourism ratings.



**3rd place**

### **Minsk is one of the cleanest cities in the world**

according to the American financial news portal The Street (among 30 countries)



**26th place**

### **Number of bilateral investment agreements concluded**

according to UNCTAD (among 234 countries)



**18th place**

### **Global Sustainable Development Goal indicators**

according to Sustainable Development Report 2020: The Sustainable Development Goals and Covid-19 (among 166 countries) financial news The Street (among 30 countries)

**Belarus is included in the TOP 10 best countries for travel in 2019**  
(International publishing house "Lonely Planet")

**Minsk is included in the TOP-20 most sporting cities in the world**  
(Information agency Sportcal)

**Belarus is among the TOP 20 best destinations for tourism in 2020** (French newspaper "Le Figaro")

**Belovezhskaya Pushcha is included in the TOP 25 best travel destinations**  
("National Geographic Traveler")

**Minsk is included in the TOP 30 cities attractive for recreation for the weekend in 2017** ("British daily newspaper The Times")

## 4.2 The main preferential regimes for the implementation of investment projects in tourism

### Small and medium-size cities, rural territories

- ▶ tax on profits – 0%\*
- ▶ property tax – 0%\*
- ▶ exemption from import duties and VAT in respect of goods made to the statutory fund
- ▶ personal income tax – 0%\*
- ▶ exemption from state duty for the issuance of licenses

\* - within 7 years

### Southeastern region of the Mogilev region

- ▶ personal income tax – 10% (for 7 years)
- ▶ pension insurance for entities – 24%
- ▶ state financial support for the construction of engineering and transport infrastructure
- ▶ reimbursement to investors of up to 35% of the capital costs of investment projects in 2021 - 2025

### Investment contracts

- ▶ VAT deduction in full amount
- ▶ import customs duties on technological equipment, raw materials, materials – 0%
- ▶ land plot provision for lease without an auction



Number of concluded investment contracts

### Augustovsky Chanal recreational and tourist park

- ▶ tax on profits – 0%
- ▶ property tax – 0%
- ▶ VAT on sales of goods (works, services) – 0%
- ▶ payment for the right to conclude a land lease agreement – 0%
- ▶ rent for a land plot from \$3-18 per 1 ha
- ▶ import customs duties on technological equipment, raw materials, materials – 0%
- ▶ state duty for the permission to work in the Republic of Belarus for foreign citizens and persons without citizenship – 0%

# National Agency of Investment and Privatization

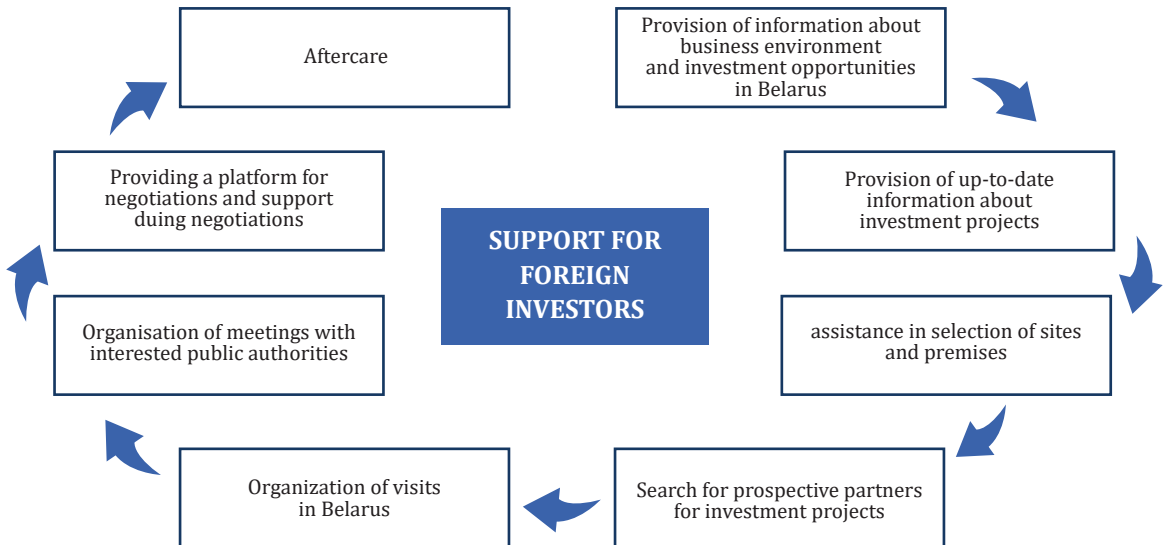
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