

ASSESSMENT OF THE TOURIST POTENTIAL OF THE BELARUSIAN POLESIE SUMMARY

There is an obvious expediency in accelerating the development of tourism as a sector of the national economy. From 2014 to 2016, its share in GDP of Belarus increased from 1.8 to 2.2%. Such dynamics characterizes the industry as one of the growth drivers, indirectly testifies to the undiscovered potential and corresponds to the global trend in the formation of a post-industrial economy, in the structure of which the share of services is increasing.

The development of the industry in the EU testifies to the significant potential of tourism in Belarus in general and in Polesie in particular. Extrapolation of data from neighboring regions of Europe allows us to conclude that the target indicator for Belarus can be to **serve up to 6 million tourists a year in rural areas**. That is, the sector can focus on a **five-fold increase** in indicators relative to 2019, when 514.8 thousand tourists used the services of agro-ecotourism entities, 710 thousand people visited protected areas.

The same amount of investment can create significantly more jobs in the tourism sector and lead to a more significant increase in value added (GDP growth) than similar investments in industry and transport.

Tourism should be considered as one of the instruments for sustainable development of the Polesie region, which, on the one hand, is unique for its natural potential, and on the other hand, it faces development difficulties. It should be taken into account that six regions of Polesie are recognized as lagging behind in socio-economic development. In addition, the region as a whole is characterized by increased risks of poverty.

Types of tourism based on the use of natural potential have different degrees of development in Belarus.

I. Agro-ecotourism. It is a steadily growing segment, which at the end of 2019 provided almost 10% of the revenue of the entire tourism industry in Belarus. However, there are a number of imbalances in the sector:

1. 70% of the flow of tourists were citizens of the Russian Federation, while the share of the EU and other non-CIS countries in total was only about 20%;
2. Homel region, on whose territory a significant part of Polesye is located, noticeably lags behind other regions of Belarus in terms of the number of agro-ecotourism entities and the number of tourists served;
3. Homel region also significantly lags behind in work with foreign tourists, whose share here amounted to only 2.1%.

The agro-ecotourism service market is entering a state of maturity and is consolidating. Agro-ecotourism entities have reduced the demand for bank lending, but the need for expert and consulting support is growing. Further growth of the sector will directly depend on the demand for tourism services.

II. Ecotourism based on protected areas. The administrations of protected areas are developing new directions of ecotourism for Belarus, on the basis of which it is possible to form full-fledged tourist products: excursions to eco-trails and swamps, tracking the tracks of wild animals, diving training, rafting trips, observing wild animals, photo hunting, etc.

The country's national parks are much more focused on the provision of tourist services than wildlife reserves. The potential of the reserves remains undiscovered, including in Polesie.

The statistics of incomes of protected areas from tourist activities includes income from the organization of hunting, which does not allow to single out income from ecotourism and more or less accurately assess the development of this direction.

III. Ecotourism based on the forest fund. This sector of tourism is at an early stage of development, does not have a pronounced compliance with the criteria of the International Ecotourism Society (TIES) and is often mixed with hunting and fishing services.

The volume of tourist services not related to hunting is relatively small: in 2017, for all forestry enterprises, it amounted to slightly more than 100,000 BYN, or 46,000 EUR. At the same time, the extrapolation of European data on the cost of forest recreation allows us to conclude that for Belarus the indicators in this sector can be increased many times over.

The Ministry of Forestry does not collect generalized statistics on tourism activities in the subordinate forest fund, which complicates the analysis. At present, the forestry enterprises of Belarus act mainly as nominal ecotourism entities and do not show real interest in the development of this direction.

Nevertheless, the experience of some forestry enterprises indicates the possibility of sustainable generation of revenue from ecotourism in the forest fund. As an example, we can take the experience of the republican reserve "Naliboksky", whose revenue from the provision of ecotourism services has steadily grown. The experience of the reserve can be extended to the forest fund in other regions of Belarus, including Polesie.

Polesie is one of the richest in forest regions of the country. However, some experts believe that due to the boggy and inaccessibility of many territories, the recreational potential of local forests is reduced. In our opinion, the implementation of the tourism potential of the forest fund of Polesie depends to a greater extent on:

- creating an adequate tourism infrastructure that does not disrupt the ecosystem;
- popularization of Polesie as a region close to the natural state, including promotion of the region's tourism opportunities abroad;
- popularization of ecotourism and its directions close to extreme sports (rafting on rivers, excursions in swamps and hard-to-reach areas).

IV. Water tourism. This direction of tourism in Belarus, in particular in Polesie, is developing quite spontaneously, which does not allow us to speak of system capitalization. However, there are examples of an organized approach.

Since April 2017, the cruise ship "White Rus" has been operating in Pripyat. An analysis of the cruise schedule and prices allows us to conclude that the revenue potential from the operation of only one motor ship on the Polesie rivers during one season is about 0.5 million EUR. Taking into account the possible rapid construction of the fleet and the scaling of services, we believe that the target for organized water tourism in Polesie could be several million EUR per year.

The rivers Pripyat, Pina, Mukhavets, the Dnieper-Bug canal and the adjacent territories have an exceptionally high tourism potential, the correct use of which can become a noticeable driver for the development of the Polesie region, including promoting the formation of small and medium-sized businesses.

Some general conclusions

A legal framework for the tourism sector has been formed in Belarus. The government's goal is to become one of the top 50 countries in terms of tourism development. Foreign citizens have the opportunity to visit the country for up to 30 days without a visa, which increases the potential of inbound tourism. Quite favorable conditions have been created for the development of agro-ecotourism, including the agro-estates have access to preferential loans.

However, the fact that the majority of the study respondents do not want to expand their business may indicate not only the transition of the market to the saturation stage, but also the presence of hidden legislative difficulties in doing business, as well as restrictions on expanding without losing preferential terms of business.

The value added per person employed in tourism is slightly lower than in a number of key industries. However, taking into account other factors, the role of tourism in socio-economic development, including in the growth of citizens' incomes, is clearly great.

Intensification of tourism can be a relatively cheap way to accelerate the development of Polesie, where, according to the government, there are six regions lagging behind in socio-economic development and in general there are high risks of poverty.

Projects in the tourism sector can be seen as an alternative to capital-intensive and environmentally risky projects such as reconstruction of the E40 waterway that runs along the Polesie rivers.

If investments of 1 billion EUR (this is how much the arrangement of the Belarusian section of the E40 waterway for compliance with the IV class of navigation was previously estimated) is reoriented to the implementation of tourism projects in Polesie, then the socio-economic return in the form of creating new jobs and accelerating economic growth can be significantly increased.

