STRATEGIC ASSESSMENT OF HIKING TRAIL ECOTOURISM IN ARMENIA

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February 2017
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Abbreviations and Acronyms

1A One Armenia
AATA Armenian Adventure Travel Association
ACE Acopian Center for the Environment
AEA Armenian Ecotourism Association
AGG Armenian Guides Guild
AHA Armenian Hikers’ Association
AMHF Armenian Mountaineering and Hiking Federation
ARK ARK Armenia
AUA American University of Armenia
B&B Bed & Breakfast
CNF Caucasus Nature Fund
CWR Caucasus Wildlife Refuge
DFA Development Foundation of Armenia
EU European Union
FPWC Foundation for the Preservation of Wildlife and Cultural Assets
GEF Global Environment Facility
GIZ Deutsche Gesellschaft für Internationale Zusammenarbeit
HDIF Homeland Development Initiative Foundation
IDeA Initiatives for Development of Armenia Foundation
KfW German Bank for Reconstruction and Development
MNP Ministry of Nature Protection
NKR Nagorno-Karabakh Republic
NGO Non-governmental organization
NP National Park
PA Protected Area
RA Republic of Armenia
SGP Small Grants Program
TCT Transcaucasian Trail
TJS Transboundary Joint Secretariat
UN United Nations
UNDP United Nations Development Program
USAID U.S. Agency for International Development
WB World Bank
WWF World Wide Fund for Nature
YBA Young Biologists Association
Executive Summary

Our Goal

The main driver of this report is to assess the potential for creating several “world-class” circuits of connected hiking trails in Armenia and to review the current challenges facing the hiking sector in developing marketable ecotourism products. This report also aims to identify the key stakeholders involved in developing hiking in Armenia and whose strategies may or may not overlap with these goals. The Hovnanian Foundation has expressed interest in investing the required time and resources to ensure that a series of hiking trail circuits in Armenia can be developed according to international standards and subsequently marketed as “world-class” to potential travellers from around the world. Each network of hiking trails would be assessed according to recognized industry standards and must include the following:

- **clear and visible paths with a maintenance system in place**
- **internationally-recognized waymarking signs**
- **single and multiple day options for beginners and advanced hikers**
- **appropriately-rated accommodation options**
- **comprehensive logistical information (maps, elevation data, degree of difficulty, technical support, mobile app, online resource portal, access to guides)**
- **cultural experiences with surrounding local community members**

Background / Context

Over the past several years, ecotourism has become a buzzword in the Armenian development discourse. Due to its potential, if done correctly, for rural socio-economic development without large-scale environmental consequences, decision-makers have come to realize the many ways that Armenia can benefit as a recognized ecotourism destination for local and international travellers.

Due to its relatively low start-up costs and accessibility to a wide range of travellers, hiking is viewed as a pioneer activity for developing ecotourism in a region. The growing number of local Armenian hiking groups, clubs and organizations reflects the growing interest in hiking; not only as a healthy exercise alternative but also as a catalyst for much-needed economic development in rural regions.

As hiking tourism grows and becomes more popular among local and international travellers, multi-stakeholder discussions are required to ensure that hiking infrastructure is developed consistently across Armenia, including in Protected Areas and rural communities. While much of the recent focus on hiking tourism is centered on the economic benefits that it can bring to rural communities and the private tourism sector, it is important to note the valuable role that it can play in nature conservation and protection.

The participation of environmental NGOs in the hiking sector will be crucial in ensuring that hiking, and other forms of ecotourism, are developed with sustainable principles in mind. Promoting hiking as an alternative source of sustainable income in local communities will act as a powerful incentive for the preservation of the surrounding natural landscape. This will require significant cross-sectoral dialogue and coordination of hiking development activity in Armenia, something which to date has been limited.
Hiking Sector Challenges

One of the recurring themes that has emerged throughout the research process behind this report has been the lack of 3 C’s in relation to the organizations involved in hiking and their actions all over Armenia; connections, cooperation, and coordination. Until recently a lot of the initiatives to develop hiking capacity and trails infrastructure have been isolated, fragmented and disconnected. This is due in large part to a lack of information sharing across organizations, sectors (i.e. private, public and nonprofit) and regions. Not only does this hinder the transfer of valuable knowledge to and from local stakeholders but it also makes it very difficult to collect, compile and then provide travellers with complete, accurate and comprehensive information about hiking in Armenia.

Ecotourism is now a recognized component of many high-level development strategies for Armenia, which are outlined in this report, but the institutions behind the strategies often do not have the required expertise to effectively implement these visions into local level projects. There is a visible lack of cooperation between the large stakeholders who are well funded and can see the “big picture”, and the smaller stakeholders who are active on the ground and possess the necessary local knowledge for ensuring sustainable results. There is no current mechanism to ensure that smaller groups are consulted when larger stakeholders begin the planning and implementation phases of their projects.1

Furthermore, there has historically been significant mistrust and a total lack of information regarding the Republic of Armenia’s previous governmental capacity to develop and promote tourism, including key ecotourism activities such as hiking. Until recently there was no clear understanding of who is responsible for developing and implementing tourism policy or how the process works. Due to a general lack of transparency and no centralized information, there exists a strong need for a coordinating body, made up of select stakeholder representatives, to address many of the issues presented in this report.

A potential “coalition of hiking stakeholders” could be initiated as an informal monthly meeting to ensure that all participants are kept up-to-date with each other’s projects and activities. As strategies become more integrated, this coordinating body could take on a more formal role that could represent the hiking sector in discussions with government ministries and international development organizations.

The collection of hiking-related data will be an important component of developing and assessing world-class hiking trail circuits. Currently in Armenia there is no agreed upon process for collecting, storing and publishing hiking data. International industry standards for data management are not being used in Armenia leading to a scenario where every group has its own method for collecting and inputting data. This lack of consistency needs to be resolved to ensure high-quality data is available and accessible by all stakeholders and travellers.

1 A SWOT analysis (strengths, weaknesses, opportunities, threats) of the hiking sector in Armenia can be found in Annex 3
Potential Hiking Trail Circuits

The research undertaken for this report aimed to uncover all of the efforts and projects on the ground working towards the creation of hiking trails in Armenia. Through meetings, discussions and interviews, each piece of the hiking sector puzzle was revealed with many missing pieces becoming evident. Of all the active projects identified and underway, we have identified four candidate hiking trail circuits that have the best potential for meeting international standards in the near future based on location, natural attractions, cultural heritage sites, existing infrastructure, availability of resources, and potential partnerships with involved organizations.

The four individual hiking trail circuits with the most potential are identified below and are discussed in greater detail in the section on Potential Hiking Trail Circuits.

1. **Dilijan National Park**
   - IDeA, CNF, WWF, TCT

2. **Arpi Lake National Park**
   - WWF, TJS, CNF

3. **ARK Bridge Project (Tatev - Kapan)**
   - WWF, IDeA, ARK

4. **Janapar Trail & Extension**
   - Janapar, TCT, ARK, AHA

Several additional hiking trail circuits with varied potential have also been identified, however further research is required to assess their current status and readiness in meeting international standards and to verify their condition. They include:

- **Caucasus Wildlife Refuge**
  - FPWC

- **Zaritap-Gomk-Martiros Trail**
  - YBA, TCT

- **Dilijan – Lastiver**
  - TCT, AHA

Each of these potential hiking trail circuits fall within the strategic plans of at least some of the following organizations, all of which are committed to developing hiking and ecotourism in these areas.

**Potential Partners**

**Initiatives for Development of Armenia (IDeA)** Foundation is working with a coalition of partners to support development of tourism, including hiking, in the city of Dilijan, Dilijan National Park (NP) and adjacent communities. IDeA is also working with WWF to create a proposed Tatev NP that would include the promotion of ecotourism activities.

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2 A complete list of undertaken meetings can be found in Annex 1
The Transcaucasian Trail (TCT) aims to scout, map, mark and build a long distance hiking trail across Georgia and Armenia that is compatible with international standards. Their work will eventually create a network of hiking trails that connect the proposed circuits above. In addition to continuing this scouting work in 2017, they are also planning to focus on a specific 75km section of the route that passes through Dilijan NP. They have received funding from CNF, and are awaiting an answer from IDeA, for a trail building camp to build parts of this section that do not currently exist. This project will engage volunteers and international experts.

The Caucasus Wildife Refuge (CWR) is a 5000-hectare territory and the only privately-owned reserve in Armenia. It is managed by the Foundation for the Preservation of Wildlife and Cultural Assets (FPWC) and is located adjacent to Khosrov State Reserve, making it an important biodiversity corridor. FPWC promotes the CWR as an ecotourism destination through its business subsidiary, SunChild Eco Tours. They have developed 3-4 hiking trails in the area as well as an Eco-Lodge.

ARK Armenia (ARK) is an ecotourism NGO based in Kapan, Syunik marz. Their ARK Bridge Project aims to connect Tatev Monastery to Kapan through a series of hiking trails, two eco-camps and information signs at every village along the way. By encouraging visitors to continue travelling south, they aim to create an ecotourism corridor that benefits neglected communities and positions Kapan as a new ecotourism destination in Armenia.

World Wide Fund for Nature (WWF) is working with IDeA to create the proposed Tatev NP and to support development of Dilijan NP. They have also helped create the first potential transboundary PA, namely Arpi Lake NP in Armenia and Javakheti NP in Georgia. WWF has previously developed “eco trails” for several PAs in Armenia but most still require updating of maps, marking, verification and maintenance.

The Transboundary Joint Secretariat (TJS), which WWF currently implements as part of a larger Ecoregional Nature Protection Program, is currently developing a regional strategy for ecotourism in the Caucasus. This strategy will include standards and guidelines for PAs and surrounding communities. Eventually, national guidelines will be developed for each country in the Caucasus.

Young Biologists Association (YBA) is a student-led NGO that works with other local NGOs to develop ecotourism activities and infrastructure in rural regions of Armenia. They have previously cooperated with Jermuk Development Center NGO to develop a couple of hiking trails in Vayotz Dzor marz and are in the process of applying for grants that would enable additional ecotourism projects in the surrounding area. The same people behind YBA are also the founders of Ecotour Travel Agency, a tour operator that specializes in scientific and educational tours to PAs.

Armenian Hikers’ Association (AHA) is an Armenian-based NGO founded in 2016. Their stated goal is to mark (with concrete posts) and map (with GPS tracks) all existing trails in Armenia, starting with the 40 most popular routes. They plan to develop a north-south hiking trail through Armenia. They are also working closely with Hans
Keifer, a trailbuilding expert from California, on updating the existing Janapar Trail.

**HIKE Armenia** was a successful crowdfunding project by One Armenia to mark 5 independent hiking trails in Armenia and upload them to a newly developed mobile application by the same name. The application is currently being updated and has the potential to include a large number of trails along with relevant information. IA has the skills and expertise to become an effective marketing partner once potential hiking trail circuits are ready for promotion. Currently their focus is on improving the app and marketing Armenia’s hiking potential.

**National Projects**

Any future development of hiking trail circuits and surrounding ecotourism infrastructure in general should be considered within the context of these recently launched national and regional strategies:

- **Integrated Rural Tourism Development Project** by the United Nations Development Program (US$ 3 million)
  - Aims to promote tourism in rural areas of Armenia as a catalyst for socio-economic development. The idea is to create rural destinations outside of traditional urban hubs and to offer local attractions to engage visitors.

- **South Corridor Tourism Development Strategy** by the World Bank (US$ 55 million)
  - The South Corridor of Armenia was chosen based on the potential of its natural and cultural assets to become tourism attractions and help drive growth in the sector. A large portion of the allocated funds will go towards Heritage Hub Regeneration and Tourism Circuit Development.

- **Eco-Regional Conservation Plan** developed and implemented by TJS and WWF
  - Focuses on PAs in the South Caucasus with the aim of promoting them as destinations for ecotourism as a means of nature conservation. PAs are meant to be integrated into economically profitable and environmentally sustainable tourism products across the South Caucasus.

- **Initiative for the Development of Dilijan and Adjacent Communities** is a two-year agreement between IDeA Foundation, the EU delegation to Armenia and the RA government (EUR 1.2 million)
  - IDeA Foundation is working with a coalition of partners to support development of tourism in the city of Dilijan, the NP and adjacent communities. A small portion of this money will be devoted to hiking trails infrastructure and possibly the TCT trailbuilding camp.

All projects aim to use the potential of regional natural and cultural assets to address the uneven distribution of tourism support towards large urban destinations. Hiking should be viewed as an important component of the ecotourism value chain in rural areas, which can benefit from and contribute to the development and environmental goals of these strategies.

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3 More detailed information can be found in the **Stakeholders Review** section
Immediate Next Steps for Hovnanian Foundation

A comprehensive list of short-term and long-term recommended actions can be found in greater detail in the Recommendations section.

- While not completely necessary to achieve results, it would be beneficial for Hovnanian Foundation and One Armenia to sign a cooperative MOU regarding the official registration of HIKE Armenia as a separate entity. The benefits include additional available resources, enhanced branding of existing activities, a well-designed theme and logo, any hiking-related data obtained until now, and a mobile application that is currently being updated.

As a separate entity, HIKE Armenia could begin implementing the following actions to develop and support world-class circuits of hiking trails in Armenia.

- Assess in greater details the needs and timeline for completing the four (4) high-priority hiking trail circuits to world-class standards. This would involve site visits, consultations with local community members, and discussions with relevant partners to create a proposed timeline, budget and action plan.

- Create a HIKE Armenia storefront (hiking resource center) in downtown Yerevan that will act as a physical one-stop shop for potential hikers and visitors. In addition to information, assistance and printed materials, the storefront can rent out hiking equipment purchased from Armenian Mountaineering and Hiking Federation (AMHF).

- Develop a working roadmap for building a comprehensive HIKE Armenia website (centralized information portal) to act as a virtual one-stop shop for hiking information, support services, logistical data, list of partner organizations and guides, published guidelines and marketing materials (18 web domains were secured in November 2016).

- Support additional scouting efforts of TCT to help identify other potential hiking trail circuits in Armenia and to cooperate with the efforts of AHA to mark and map existing trails.

- Work with FPWC to assess in more detail the current state of hiking trails inside the CWR and to identify opportunities for further development and promotion.

- Support the efforts of TCT, AHA and ARK to extend the current version of the Janapar Trail from Nagorno-Karabakh Republic (NKR) into Armenia while assessing surrounding support infrastructure, funding improvements, providing marketing support, and implementing consistent standards along the extensions.

- Facilitate coordination within the hiking ecotourism through the creation of a Coalition of Hiking Stakeholders roundtable with monthly meetings to update each other on activities, announce new plans and seek out cooperation. The AUA Ecotourism Conference (April 15, 2017) is a good opportunity to build on cooperation and act towards common goals.

By focusing efforts on developing a handful of selected, localized hiking trail circuits, a new HIKE Armenia entity could further act as the “glue” that brings the necessary stakeholders together to work collaboratively on integrated, inclusive and coordinated
pilot projects. Such a model would allow for the efficient use of everyone’s resources and capabilities to create several regional circuits of “world-class” hiking trails that would all meet the same standards for quality, reliability and safety.

**Highest Potential Hiking Trail Circuits**

The following hiking trail circuits have been identified as areas where a new, separate HIKE Armenia entity could have the biggest impact in the short-term. Based on their natural landscape, available resources, cultural attractions, potential for cooperation with partners and proximity to rural communities, these candidates are the closest to being ready for marketing to international travellers. They are listed in order of importance based on their overall potential and readiness. Additional hiking trail circuits have also been identified which may become potential candidates for this list after further evaluation and additional resources.

**Dilijan National Park**

The city of Dilijan and the area around it have now become a popular focal point for development strategies and the investments that they bring. The opening of United World College was a catalyst for IDeA Foundation to launch the Dilijan Development Fund, for which a EUR 1.2 million agreement has just been announced between EU and IDeA. CNF has created a Tourism Development Strategy for the area and WWF is working on improving the standards of Dilijan NP as a PA. All of these efforts share the goal of creating a flourishing ecotourism industry that attracts tourists while also maintaining conservation principles.

*Figure 1 - Map of Existing Hiking Trails and Attractions within Dilijan NP (CNF)*

The convergence of all this interest and resources into Dilijan was a major reason why TCT decided to undertake a pilot project in Dilijan NP. The North-South prototype route that TCT is developing will pass through Dilijan NP and their 2-month trail building
camp will focus on building up this 75km section to meet international standards. Some areas will only require simple maintenance and marking, whereas other areas will require trail construction and infrastructure building. This is a great opportunity to engage local stakeholders and hiking groups to participate in trail building while also learning valuable skills in safety, teamwork and trail design.

TCT has already received funding commitments from CNF and are awaiting final confirmation from IDeA to fund the remaining project budget. TCT will enlist the expertise of an international trail building expert to design the project and lead a crew; Hans Keifer has already agreed to provide one week of his time to the project pro bono. Additional funding may be necessary to involve him in the project for a longer duration.

**Figure 2 - Map of Transcaucasian Trail passing through Dilijan National Park (TCT)**

![Map of Transcaucasian Trail passing through Dilijan National Park (TCT)](image)

**Arpi Lake National Park**

The development of cross-boundary ecotourism is a major development goal bringing together organizations such as WWF, TJS, CNF and KfW. It’s also part of the mandate of TCT to connect Georgia and Armenia via hiking trails.

While there has not been a lot of work yet done to develop an ecotourism corridor between Georgia and Armenia, connecting Arpi Lake NP with Javakheti NP in Georgia has the greatest potential to kickstart the process. The fact that they are both PAs means that they fall under well-defined strategies of WWF and TJS in particular. These organizations most likely have resources already allocated to the development of cross-border ecotourism products, and cooperation could be easily facilitated between other potential partners and stakeholders.
Arpi Lake NP holds great potential due to its proximity to another NP in Georgia and the existing infrastructure that already exists. However further research is required to determine the hiking potential of existing tourist trails and the quality of surrounding infrastructure, including accommodation options. A Tourism Development Plan for Arpi Lake NP has been prepared by CNF however this has not yet been implemented, as it first requires discussion with Republic of Armenia (RA) Ministry of Nature Protection (MNP).

Further work is also required to understand how cross-boundary hiking trails across these two NPs can fit into the area's ecotourism development plan. WWF and TJS already have a mandate for cross-border ecotourism development and are in ongoing dialogue with counterparts in Georgia. Furthermore, TCT is actively exploring options for connecting its North-South prototype trail across the border and could provide useful scouting support.
### ARK Bridge Project (Tatev – Kapan)

Tatev Monastery is one of the most recognized attractions in Southern Armenia and the region. Despite the large number of visitors that visit Tatev Monastery annually, a very small percentage continue their journey further south. This excludes the major towns of Kapan and Meghri as well as surrounding villages from the economic benefits of tourism.

*Picture 1 - ARK Armenia billboard next to Tatev Monastery (ARK Armenia)*
ARK Armenia is an NGO based in Kapan that is working towards promoting Kapan and the region as the next big ecotourism destination in Armenia. Having realized the popularity of Tatev Monastery as a destination, the ARK Bridge Project was launched to connect Kapan and Shikahogh State Reserve to the rest of the Armenian tourism circuit. Through a series of hiking trails, eco-camps and an information support system, ARK is making it easier for travellers to further explore Southern Armenia and the enormous potential it has for ecotourism.

**Figure 5 - ARK Bridge Project connecting Tatev Monastery and Kapan (ARK Armenia)**

Hiking is the main activity intended to attract tourists and while a lot has been done on a minimal budget, much more is required to offer tourists a comfortable and enjoyable experience. ARK requires funding to build the last of three eco-camps along the Tatev-Kapan route as well as to mark possible trail routes and other points of interest. Infrastructure such as non-camping accommodation options also need to be developed, as do information signs at each village indicating where travellers can obtain food and other necessities.

**Janapar Trail & Extensions**

The Janapar Trail is the first long-distance trail to be developed in either Armenia or NKR. The trail path has changed significantly since its creation due to the paving of previously unpaved roads, the fading of trail markers and a lack of updated info regarding homestay options. Hans Keifer, in cooperation with AHA, biked the trail in 2016 and both are facilitating an ultra marathon along the trail in 2017.

Both TCT and ARK have plans to utilize potential extensions of the Janapar Trail at its northern and southern ends. Scouting has already taken place for the northern extension from Vardenis towards Dilijan until Meghradzor. ARK will scout the southern extension in 2017 to connect it to its own trails through Shikahogh State Reserve or the village of Davit Bek.
By supporting the efforts of TCT and ARK, a cross-boundary hiking trail circuit can be created to meet a wide range of needs and experiences. However, the original Janapar Trail can benefit from the maintenance work planned by Hans Keifer and AHA as well as further development of supporting infrastructure (i.e. B&Bs, value-chain food providers, guides, etc.).
Additional Hiking Trail Circuits

In addition to the four hiking trail circuits identified as having the best potential for meeting international standards in the short-term, there are at least three other potential circuits that require further research to determine whether they can be included as candidates. These are described in order of priority based on the resources required to bring them up to standard.

Caucasus Wildlife Refuge (CWR)

The CWR is the only privately-owned nature reserve in Armenia and the region. The territory has an area of approximately 5000 hectares and is located adjacent to Khosrov State Reserve. FPWC manages the CWR but its subsidiary, SunChild EcoTours, is responsible for hosting visitors and offering ecotourism activities within the CWR. SunChild has also built an Eco-Lodge near the village of Urtsadzor to provide accommodation for visitors and researchers.

*Figure 7 - Location of Caucasus Wildlife Refuge (FPWC)*

They have developed 4 hiking trails inside the CWR, each between 3-7 hours in duration. These trails include cultural and natural attractions along the way and offer activities such as nature watching, horseback riding and camping. However, a more detailed assessment and site visit is required to understand and verify their current marketability and capacity of surrounding support infrastructure to host travellers.
The fact that CWR is an important biodiversity corridor makes these trails unique in terms of the wildlife that can be seen while hiking. Since Khosrov State Reserve has limited opportunities for hiking, and is closed to overnight stays, the CWR offers surrounding communities the opportunity to engage in ecotourism activities.

**Vayots Dzor Trails (Zaritap-Gomk-Martiros and Gnishik)**

This route is located in Vayots Dzor marz and has been designed and marked into two sections, both beginning in the village of Zaritap with options to hike to Gomk (4.5km) or Martiros (3-5km). Each individual trail can be done in approximately 4-5 hours passing through natural and historical sites.

This small hiking trail circuit was developed by YBA and Jermuk Development Center NGO with financial support from The Rufford Foundation and RA government. In addition to marking the trail, the two NGOs also offer guiding, horseback riding and horse rental services.

The route has potential to become a candidate if it can be turned into a closed “loop” circuit and/or connected with other nearby trails. Both YBA and Jermuk Development Center NGO are open to further cooperation in developing a regional network of connected hiking trails within Vayots Dzor marz. Future needs and gaps will be better understood once they submit a proposed grant for ecotourism development in the region.

**Dilijan - Lastiver**

Existing hiking trails between Dilijan National Park and Lastiver waterfall have been scouted by TCT and will form part of their North-South prototype route. It's still uncertain what kind of work needs to be done in terms of bringing the trail up to
international standards, but it is an option with very high potential.

The fact that the route lies outside of Dilijan NP means that fewer organizations would consider it as part of their ecotourism strategies. The only interested parties would be Apaga Resort in Yenokavan and the Wild Trail Lodge in Hovk, whose founder assisted TCT with the initial scouting and route planning. These existing accommodation options can act as hubs along an expanded hiking network and the basis for further development of the region.
Recommendations

The following short-term actions and initiatives can be undertaken immediately by a new separate HIKE Armenia entity, based on the signing of a cooperative MOU between Hovnanian Foundation and One Armenia to officially register HIKE Armenia as such, to support existing initiatives and fill gaps within the framework of developing at least three world-class hiking trail circuits within the next 6-12 months.

As a separate entity, HIKE Armenia could begin implementing the following recommendations to develop and support world-class circuits of hiking trails in Armenia. These recommendations have been grouped into categories and prioritized based on existing gaps in the hiking sector and potential for immediate impact.

Short-Term Next Steps

It is important to note that there is significant potential for collaboration with regards to potential hiking trail circuits that pass through PAs. In addition to developing Tourism Development Plans for several PAs, CNF also matches dollar for dollar the expenses of PA management of the RA MNP. They are very much interested in opportunities to leverage funds and match investments with partners such as Hovnanian Foundation for ecotourism development inside PAs.

Additionally, WWF and TJS have indicated cross-border ecotourism projects as one of the main priorities for regional ecotourism development and have the mechanisms in place for coordinating with Georgian stakeholders.

High Potential Hiking Trail Circuits

TCT Dilijan NP Trailbuilding Camp

- While TCT will be focusing on building the physical components of hiking trail sections through Dilijan NP, and connecting these sections with existing trails, there will be a need to develop capacity-building programs for rural residents who will now have the opportunity to provide ecotourism support services to visitors.

- The marketing of these new trail sections, and the resulting connected trail network, will need to be funded and implemented on an ongoing basis. In addition to having an online presence and continuous social media, printed materials (i.e. brochures, maps, itineraries, guidebooks) will have to be published and made available to prospective visitors.

Arpi Lake NP

- Before developing the potential that Arpi Lake NP has for a cross-border hiking trail network, the existing infrastructure must first be evaluated in both Arpi Lake NP and, with the help of WWF and TJS partners, Javakheti NP. Trails do already exist in Arpi Lake NP but may not all be suitable for hiking. Furthermore, accommodation options need to be identified, evaluated and in most cases improved. Making use of CNF’s Tourism Development Plan for Arpi Lake NP, hiking trails can complement other activities to ensure a comprehensive product that can be marketed as a destination independently or in connection with a cross-border connection to Javakheti NP.
ARK Bridge Project

- ARK Armenia is ready to finalize the development of a hiking trail between Tatev Monastery and Kapan, and beyond, as part of their regional ecotourism strategy. They currently lack funding and a community relations assistant to develop the missing infrastructure and services along the ARK Bridge Project trails. This includes a 3rd eco-camp in the village of Aghvani, which will include raspberry permaculture in partnership with the community, B&Bs and/or homestay options in other villages, integrated local value chains, and technical support to the villages along the way to ensure they have the capacity to welcome a greater flow of tourists.

Information & Resource Management

Hiking Storefront & Resource Center

- There is a need for a centrally located, physical space where casual hikers and interested visitors can obtain up-to-date information and advice related to hiking ecotourism. All existing information about hiking trails in Armenia needs to be collected and offered in a way that allows potential hikers to create their own itineraries and connect them with local service providers (B&Bs, transportation, guides, etc.). A potential downtown location has been identified for creating this one-stop shop.

- The storefront could purchase select equipment from the AMHF store for rental use by independent travellers. This would allow beginners and casual hikers to affordably rent equipment and encourage more people to go hiking in rural areas. AMHF has everything a potential hiker would need in Armenia including high-quality tents, sleeping bags, hiking boots and clothing, climbing gear and tools.

Centralized Information (Online) Portal

- Several organizations have expressed an intention to create a centralized website for hiking and ecotourism in Armenia. Since no organization is realistically close to launching such a website, a separate HIKE Armenia entity could immediately invest the required resources into this initiative and commit to sharing data with all relevant parties. A working roadmap, developed after research of best practices and in consultation with relevant stakeholders, should be created for the purposes of building a virtual one-stop shop for hiking in Armenia. As a first measure, Hovnanian Foundation obtained 18 individual web domains that can be used for such a purpose.

Hiking Trail Scouting and Assessment

Additional Hiking Trail Circuits

- TCT will continue its trail scouting around Armenia in 2017. They have already received in-kind support from Land Rover in the form of access to their vehicle for the year. Scouting for 2017 would include mapping out the entire North-South prototype route through Armenia, collecting important hiking trail data, designing infrastructure projects for the newly created TCT NGO to implement,
and producing unique content of Armenia’s hiking potential to a global adventure audience (i.e. guidebooks, social media content, articles, blog posts).

- Ongoing work is required to fully assess the three additional potential hiking trail circuits (Caucasus Wildlife Refuge, Vayots Dzor, Dilijan-Lastiver) while also identifying possible connections for building regional networks. Additional potential hiking trail circuits could also be identified where an overlap of strategies and resources could lead to relatively quick development. This would fall under TCT’s expedition work and would include cooperation with AHA, who are also planning to design a long-distance trail through Armenia.

**Janapar Trail**

- The Janapar Trail is undergoing changes on two different fronts. First, in collaboration with Hans Keifer, AHA are planning to undertake maintenance work, update the trail with new signs, do possible rerouting in some areas, and market the Janapar Trail. Secondly, a northern extension of the Janapar Trail into Armenia through Vardenis, and eventually to Dilijan, has already been scouted and will connect to the TCT’s trail. TCT has agreed to assist with marking and development of the trail in the areas where they both overlap. ARK Armenia has also expressed interest in scouting a southern extension into Syunik marz.

- Financial support is required for both of these projects but would require further discussions with AHA and TCT to understand how a separate HIKE Armenia entity could fit into the picture. This could include assessing surrounding support infrastructure and funding improvements, providing marketing support, implementing consistent standards along the northern extensions, and funding scouting work for the extensions.

**Standards & Best Practices**

**Guidelines**

- Building on the work done by the Armenian Ecotourism Association (AEA), a separate HIKE Armenia entity can either undertake or support efforts to introduce ecotourism guidelines to Armenia, from which hiking can greatly benefit. This would first require in-depth research and an evaluation of international best practices and existing global standards to determine the best fit for the hiking sector in Armenia. The areas that could most benefit from international standards are trail waymarking, trail classification, difficulty ratings, accommodation ratings, and ecotourism business sustainability (including factors such as waste management, impact on surrounding nature, community involvement, etc.). TJS and WWF have identified European standards for ecotourism in PAs that can also be applied to hiking activities.

**Certifications**

- These international standards would then become certifications for entire sectors; an objective instrument agreed upon by major stakeholders to assess different aspects of hiking trails in Armenia. The only such certifications that currently exist in Armenia is the guide training done by Armenian Guides Guild, which is a member of the World Federation of Tourist Guide Associations and thus can count on international expertise to review their activities. Whatever
certifications are ultimately agreed upon, they should be made public (to both
tour operators and travelers) to promote transparency and compliance.

**Long-Term Next Steps/Plans**

There are also several long-term institutional gaps that HIKE Armenia, as a new
separate entity, could fill that would strengthen the overall hiking and ecotourism
capacity of Armenia. These actions would require strategic cooperation with
stakeholders and a constant presence for several years to ensure successful
systematization.

**Coordination of Activities**

Facilitating cooperation among ecotourism stakeholders is an important role that is
currently missing. HIKE Armenia can act as a catalyst for regular monthly meetings
among the larger organizations and can also act as a liaison for smaller groups. Many
groups expressed a desire for greater cooperation but are simply too focused on their
own strategies and there is nobody at any given organization whose job description is
to share information, pool joint resources, seek out the necessary connections and
encourage collaboration.

This is a real opportunity for a separate HIKE Armenia entity to be the “glue” that drives
cooperation across all stakeholders thus ensuring more purposeful, strategic,
integrated, multi-level, holistic, inclusive, coordinated and effective hiking development
initiatives across all levels of organization. The goal would be the efficient use of
everyone’s resources and capabilities to create several regional networks of “world-
class” hiking trails that would all meet the same standards for quality, reliability and
safety.

Knowing what everyone is doing, as was necessary for preparing this Assessment,
allows us to visualize and make connections between groups. Being a central hub of
information, both online and as a physical presence, will also allow us to act as a
cooperation focal point. This is a horizontal approach to coordinating as opposed to a
vertical or top-down approach.

It’s worth noting that just the process of preparing this report alone has led to tangible,
positive changes in cooperation within the hiking and ecotourism sectors. Our presence
has been a focal point for information sharing and we have facilitated introductions that
will hopefully lead to meaningful cooperation in the future. Our continued involvement
will also be valuable in ensuring that everything is then made available in a centralized
manner to in-country hikers and potential travellers to Armenia.

**Marketing**

The marketing of Armenia as a potential hiking and ecotourism destination is a
patchwork of disjointed efforts, mostly by private tour operators, without any clear
coherent strategy from industry associations or government bodies.

On the one hand, DFA has been given a mandate to promote tourism in Armenia on the
international stage. Despite the significant funds available and invested, which have not
been made public, there is no active tourism campaign or strategy to attract tourists to
Armenia. In many cases, private tour operators are the only representatives of Armenia
at international tourism trade shows and must often fund their own participation.
On the other side of the spectrum, One Armenia is recognized as having some of the best marketing skills in Armenia. The quality of their content is reflected in the reach they have across a worldwide audience that continuously supports their crowdfunding campaigns. However when it comes to their existing HIKE Armenia project, they do not have the resources to undertake a large-scale international marketing campaign and on-the-ground activities.

Hovnanian Foundation has the unique ability to invest significant resources in a transparent manner and call upon the marketing skills of 1A to sustain a long-term, multimedia marketing campaign that promotes Armenia’s hiking trails and ecotourism attractions to target audiences around the world.

The development of a coherent marketing strategy would require the participation of a select number of stakeholders including DFA, the RA State Committee on Tourism, WWF, TJS, TCT, AHA, 1A and tour operators. In the absence of government action, WWF has begun this consultation process and plans to develop a comprehensive ecotourism marketing strategy by the end of 2017.

**Geodatabase Management**

Geographical Information Systems (GIS) is designed to capture, store, manipulate, analyze, manage, and present spatial or geographic data. This technology is widespread around the world and a crucial input to decision-making and policy analysis. In Armenia, GIS is just starting to be recognized for its value (mostly coming from international development organizations). A great deal of data collection and mapping is required across the many projects focused on developing hiking and ecotourism in Armenia. The current state of GIS in Armenia is one of inconsistent methods, incomplete datasets, no agreed upon standards, and no central system for storing and accessing data.

Given the lack of capacity in Armenia to process and manage this data, the newly created AUA GIS Laboratory is an attempt to fill both an institutional and technical gap. If other stakeholders can learn how to conduct accurate mapping and data collection, then the AUA GIS Lab can take care of the geodatabase management that will be required by all relevant organizations if they are unwilling or unable to allocate the necessary resources. Creating one central dataset of map data for Armenia is a priority that will also serve other development efforts and build the local capacity for a growing international industry. Initial seed funding is needed to collect initial data, build a working geodatabase and conduct training workshops.

The AUA Acopian Center for the Environment will be hosting the 2nd AUA Ecotourism Conference in April 2017. This year’s format may include a specific working group of stakeholders to collect, standardize and process hiking trail data into a central geodatabase for mapping. HIKE Armenia should think about either sponsoring a workshop or giving a hiking-related presentation to target audiences. The foreseen coordination role for a separate HIKE Armenia entity can also carry over to the AUA Ecotourism Conference to ensure transparency in the hiking sector.
Stakeholders Review

A review of the main stakeholders currently involved in building capacity of Armenia’s hiking trails and surrounding ecotourism infrastructure includes:

- Local NGOS
- Foundations and Institutions
- Industry Associations
- Tour Companies
- International Donors
- Country Development Organizations

Local NGOs

The Transcaucasian Trail (TCT)

The TCT is developing a North-South prototype hiking trail across Georgia and Armenia. In addition to scouting, mapping, marking and building these trails, they have proposed a side project to develop a 75km section hiking trails according to international standards. This section passes through Dilijan NP before connecting on both ends with the larger North-South prototype hiking route that still requires significant scouting. The pilot project would engage volunteers, hiking enthusiasts and local residents to work on trailbuilding, trail maintenance, construction, safety training, environmental awareness, and data collection. TCT is taking advantage of the interest in and around Dilijan to advance their small pilot project. They have received funding from CNF and are awaiting confirmation from IDeA for this project.

Armenian Hikers’ Association (AHA)

AHA was founded as a hiking club for Armenians in Los Angeles several years ago. In 2016 they raised funds to create an Armenian-based NGO by the same name to develop hiking trails in Armenia. Their current project is to waymark the 40 most popular hiking trails all over Armenia with stone posts, which they have deemed as the best solution for all trails in the country. They are working towards updating the Janapar Trail and have also expressed an interest in creating guidelines for the hiking sector in Armenia.

HIKE Armenia

HIKE Armenia started as a crowdfunding project by One Armenia to raise approximately $28,000 to mark 5 hiking trails, build a hiking mobile application and market hiking activities to its followers. After successfully reaching their goal, 5 trails located far apart from one another were marked and included in the app, which has already been launched but is still in beta mode. An update to the app should be ready in 2017 however the HIKE Armenia project may not have the required funds to continue improving the app in the long-term. They have decided not to mark any additional trails and will instead focus on marketing Armenia as a potential hiking destination.

ARK Armenia

ARK Armenia is the only ecotourism NGO focused on southern Armenia (Syunik marz below Tatev Monastery). Given the region’s natural potential and historical legacy of mining, it has identified ecotourism as a viable alternative and hiking is a major component of their strategy. Their ARK Bridge Project aims to connect Tatev Monastery
to Kapan through a series of hiking trails, two eco-camps and information signs at every village along the way. By encouraging visitors to continue travelling south, they aim to create an ecotourism corridor that benefits neglected communities and positions Kapan as a new ecotourism destination in Armenia.

**ArmHiking NGO**

Through government grants, ArmHiking NGO has offered a series of hiking camps aimed at disadvantaged youths. These camps offer training in hiking safety, nature, first-aid and ecotourism marketing. They will be partnering with TCT on their trailbuilding camp in Dilijan NP and have several hiking activities planned for 2017.

**Young Biologists Association (YBA)**

YBA is a student-led NGO started by biology students at Yerevan State Medical University. In addition to scientific and educational projects, they work with other local NGOs to develop ecotourism activities and infrastructure in rural regions of Armenia. Along with Jermuk Development Center NGO, they organized the first Ecotourism Festival in Armenia and developed a couple of hiking trails in Vayots Dzor marz. They are currently in the process of applying for grants that would enable additional ecotourism projects in the surrounding area.

**Foundations and Institutions**

**Initiatives for Development of Armenia (IDeA) Foundation**

IDeA is working with a coalition of partners to support development of tourism, including hiking, in the city of Dilijan, the National Park and adjacent communities. They recently signed a two-year agreement with the European Union Delegation to Armenia worth EUR 1.2 million for the implementation of this project. A small portion of this money will be devoted to hiking trails infrastructure and the TCT trailbuilding camp.

IDeA is also working with World Wildlife Fund (WWF) to create a proposed Tatev NP that would include the promotion of ecotourism activities.

**Caucasus Nature Fund (CNF)**

CNF primarily works with government to assist in the management of Protected Areas (PAs) in Armenia. They match every dollar spent by the RA MNP to cover costs of operation, infrastructure and development. They are often the ones pushing for better practices in the MNP. CNF has developed Tourism Development Strategies for three Protected Areas including Arpi Lake NP, Dilijan NP and Khosrov State Reserve, which is adjacent to the Caucasus Wildlife Refuge. They are one of the partners of IDeA Foundation for Dilijan NP and have agreed to partially fund the TCT project there in 2017.

**World Wildlife Fund (WWF) / Transboundary Joint Secretariat (TJS)**

WWF and TJS are currently in the process of creating a Regional Strategy for Ecotourism in the Caucasus, which will be followed by Country Ecotourism Development Plans for PAs after consultations with RA government bodies.

They are also working to create the first transboundary Protected Area; Arpi Lake NP in
Armenia and Javakheti NP in Georgia. Arpi Lake NP will serve as the focal point for implementing ecotourism standards and can act as a pilot project for creating the first cross-border hiking trail circuit in the Caucasus.

They are also working closely with IDeA Foundation on creating Tatev National Park.

**Foundation for the Preservation of Wildlife and Cultural Assets (FPWC)**

The CWR is a 5000-hectare territory and the only privately-owned reserve in Armenia. It is managed by the FPWC and is located adjacent to Khosrov State Reserve, making it an important biodiversity corridor. FPWC promotes the CWR as an ecotourism destination through its business subsidiary, SunChild Eco Tours. They have developed 3-4 hiking trails in the area as well as an Eco-Lodge.

**AUA Acopian Center for the Environment (ACE)**

AUA ACE hosted the AUA Ecotourism Conference in April 2016, the first of its kind in Armenia. Over 500 people attended and a wide range of topics was discussed amongst ecotourism practitioners and stakeholders. There are plans for a 2nd AUA Ecotourism Conference in 2017. ACE is a neutral and credible voice that can bring stakeholders together, collect/distribute information and act as a platform for sharing of ideas and networking.

**Homeland Development Initiative Foundation (HDIF)**

HDIF is a non-profit organization focused on creating crafts-based jobs for women in rural regions of Armenia. They have partners, local businesses run by women, who supply high-quality crafts for domestic retail and international export, in 15 different towns and villages all over Armenia. They would like to develop each of these partners as a cultural destination that would combine with other ecotourism activities, along hiking trails, to provide a more engaging experience for travellers.

**Industry Associations**

**Armenian Adventure Travel Association (AATA)**

The AATA is a union of adventure companies and NGOs that seek to develop adventure tourism activities in Armenia. This mostly includes extreme sports but hiking activities fall within their scope. They are a member of the global Adventure Travel Trade Association and have had some past cooperation with Georgian organizations. AATA undertakes trainings for adventure guides with past assistance coming from USAID and ATTA funding international experts. They are always trying to foster cooperation among their members and would be a good partner to use for contacting stakeholders, sharing information and coordinating activities.

**Armenian Guides Guild (AGG)**

The AGG is the main organization involved in guide certification in Armenia. As a member of the World Federation of Tourism Guides Association (WFTGA) they can count on international expertise to help develop their guide training programs, which are then periodically reviewed by this body. The previous guide licensing system was operated by the RA government but stopped in 2012 due to ineffectiveness in meeting standards and accusations of corruption. Since then, AGG has been offering 5-month
training courses and examinations in Yerevan for prospective guides at a cost of about 300,000 AMD. Some expedited versions of these trainings have occurred in regional cities when there has been financial support to do so, however they are not as comprehensive as the longer Yerevan-based programs.

Moving forward, they are working with the State Tourism Committee to create a basic, standard certification process for all guides in Armenia. This will be based on their model of training courses and examinations (will continue to take place in Yerevan and last approximately 5 months). However AGG is negotiating with the State Tourism Committee to find a way to lower the cost.

AGG will also undertake the training programs for local regional guides that fall under the My Armenia program of USAID and Smithsonian Institution.

Armenian Ecotourism Association (AEA)

AEA is run by Zhanna Galayan, referred to some as the “mother of ecotourism in Armenia”. AEA works on ensuring that ecotourism is developed with environmental principles in mind, including preservation and protection of natural and cultural assets. In order to avoid “greenwashing” of the ecotourism industry, AEA proposes the introduction of internationally-recognized standards and certifications for all businesses engaged in ecotourism.

Armenian Mountaineering and Hiking Federation (AMHF)

AMHF is the main umbrella organization for related clubs and groups. They are highly respected and can be an important representative when trying to engage smaller groups.

They are mainly focused on climbing, skiing and mountaineering ecotourism and thus are a member of the International Climbing and Mountaineering Federation (UIAA) and International Federation of Sport Climbing (IFSC).

They run a hiking and mountaineering equipment store near the Yerevan Railway Station that also serves as their headquarters. The location is an ideal place to set-up a temporary ecotourism resource center where information and equipment can be distributed to travelers.

Armenian B&B Association

Also know as Bari Galoust, this is an association of approximately 50 small-scale B&B owners all over Armenia. This is the largest network of accommodation options but despite having a database of members, there is no interactive map indicating where the B&Bs are located. The association ensures that all members meet minimum conditions and can be a useful partner when trying to bring up the standards of potential B&Bs near the identified hiking trail circuits.

Tour Companies

SunChild EcoTours

A business subsidiary of FPWC, SunChild mostly focuses on offering tours inside the CWR. This includes hiking activities and accommodation at its Eco-Lodge. SunChild does
offer personalized tours to other rural parts of Armenia with a focus on nature and cultural sites.

**Ecotour Travel Agency**

Ecotour was created by YBA to mostly serve visiting scientists and academics. Their focus is on wildlife, such as bird watching and agro-tourism, with tours being offered all over Armenia, including in PAs. The biology background of its founders means that they have unique knowledge of Armenia’s biodiversity and are committed to principles of nature conservation.

**Armenian Geographic**

A local tour company that organizes adventure “geotourism” trips for local Armenians to areas with geographic and natural importance. Armenian Geographic also holds regular educational seminars in Yerevan to teach people about Armenia’s geographic and environmental history. Their aim is to change the way local Armenians travel inside Armenia and is one of the few companies that targets locals more than international visitors.

**International Donors**

**United Nations Development Program (UNDP)**

The UNDP has launched an *Integrated Rural Tourism Development Project* to help address the uneven distribution of tourism support towards large urban destinations. The idea is to create rural destinations outside of traditional attraction hubs and to encourage visitors to extend their stays in these “niche” destinations.

To achieve these objectives, UNDP will screen and select 60 local communities for participation in the project. These communities will each benefit from capacity-building support from UNDP and experts to create their own committee for sustainable destination management and the necessary mechanisms to avoid social exclusion and ensure the benefits of tourism development are retained in the community. Through these committees, communities will be able to participate in identifying their own tourism assets, defining their needs for tourism development, and establishing local supply chains for products/services.

In parallel, there will be a focus on developing local entrepreneurs, small and medium-sized enterprises (SMEs), and the Armenian tourism industry as a whole. Concrete details are not available at this moment since the project is currently in the planning stage. However, a budget of US$ 3 million has been allocated for the project activities with the majority being concentrated on local training and consulting.
Figure 9 - Integrated Rural Tourism Development Project Flowchart (UNDP)

Project partners include:

- USAID to provide technical expertise
- Small and Medium Entrepreneurship Development National Center (SME DNC) to provide a loan mechanism of up to US$ 5 million
- KfW German Development Bank to provide up to US$ 1.5 million for business development
- DFA to assist in coordination of marketing and promotional activities
- World Bank to assist in coordination of rural community infrastructure

Once formed, local tourism destination committees should be connected with hiking groups and NGOs during the training and identification phases. This would allow for hiking assets to be included into local strategies and at the same time hiking experts can advise on how best to improve the relevant infrastructure.

United Nations Global Environmental Facility (UN GEF)

UN Global Environment Facility (UN GEF) has a Small Grants Program (SGP) which gives up to US$ 50,000 grants to local NGOs for community-driven projects that fall under one of the following strategic themes; Conservation of Biodiversity, Climate Change, Land Degradation and Sustainable Forest Management, International Waters, Chemicals and Waste, and Capacity Development.

Ecotourism is viewed as a tool for conservation, sustainable land use and capacity development. Among the many projects that have been supported in Armenia, the SGP has funded three (3) separate visitor centers located in the villages of Dsegh (Lori), Urtsadzor (Ararat) and Hors (Vayots Dzor). These visitor centers have different management structures in place in an ongoing effort to determine the most effective model for operating future visitor centers.

These make up only a small fraction of the total number of visitor centers that exist all
over Armenia. They can be found in NPs, town centers and popular tourist sites. However, each center is an independent entity, isolated from other centers. Most are poorly funded and do not have the resources to offer the kind of information that tourists seek. There is also a complete absence of contact and information sharing across visitor centers.

The goal of providing travellers with complete, accurate and up-to-date information will require creating an information sharing network across all visitor centers in Armenia. The much-discussed creation of a central ecotourism information center in Yerevan would help centralize information from the visitor centers and act as a focal point for cooperation and coordination.

The World Bank Group (WB)

The WB, through its International Bank for Reconstruction and Development (IBRD), has approved a loan of US$ 55 million to the RA to help cover 80 percent of the projected costs of a Local Economy and Infrastructure Development Project.

The total loan amount is split into two components:

- **US$ 50.4 million for Heritage Hub Regeneration and Tourism Circuit Development**
  - Public urban infrastructure improvements in select towns (Goris, Meghri) and villages (Areni, Tatev, Tandzatap) to transform them into destination hubs along the main tourism circuit
  - Site infrastructure and management plans at select cultural and natural sites located along main tourism circuit
  - Public-Private Investments (PPI) in complementary public infrastructure to enhance viability of private investments in tourism and agribusiness
  - Project management, designs and construction supervision to ensure quality implementation and sustainable management of works
  - Steering committees will be formed to consult with local communities and industry as well as take on the roles of project implementers

- **US$ 4.5 million for Institutional Development**
  - Improving the capacity and performance of DFA, State Tourism Committee and project implementers in areas of marketing, planning, management of sites, skills training, cultural heritage protection, and monitoring & evaluation
  - Includes WB assistance in coordinating policy-making and implementation processes between State Tourism Committee and DFA

The foundation and rationale for this project is the South Corridor Tourism Development Strategy developed for the RA government by the World Bank. The South Corridor of Armenia was the focus of this strategy based on the potential of the natural and cultural assets to become tourism attractions and help drive growth in the sector. The strategic recommendations from the report were to strengthen the tourism value chain, to improve or build on each of the critical components of infrastructure, products and marketing, human resources and investment.

*Moving forward it will be crucial that this South Corridor Strategy incorporates the networks of hiking trails being developed while also ensuring that these same hiking trails can take advantage of the resources being invested in infrastructure surrounding cultural and natural attractions.*
**Figure 10** – Armenian Southern Corridor Tourism Circuit (World Bank)

**Country Development Organizations**

**German Bank for Reconstruction and Development (KfW)**

A German government-owned development bank that finances and supports programs and projects in Armenia through cooperation with the Government of Armenia. Areas of cooperation include electricity supply, water and sewage management, nature conservation and SME development. They are working with UNDP to build capacities of SMEs in the rural tourism sector. They also finance projects of WWF and TJS to develop ecotourism standards in PAs.

**Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ)**

A German service provider that implements projects financed by KfW and other international donors. Their two main programs are *Business Development* and *Integrated Biodiversity Management*. The latter is focused on a wide range of activities including: national forest monitoring and management, valuation of ecosystem services, erosion control, government capacity-building, regional cooperation and raising environmental awareness.

The Business Development program aims to work on training of tourism service providers and the creation of a wine information center in Areni. These plans have not yet been finalized but should be in implemented starting in 2017.
USAID

The U.S. Agency for International Development (USAID) has funded 3 specific ongoing programs that are relevant to hiking and ecotourism; My Armenia, Partnership for Rural Prosperity, and Advanced Rural Development Initiative. Since there seems to be significant overlap between the UNDP project and USAID’s programs, USAID has been retained by UNDP as a partner to provide expertise and resources to the Integrated Rural Tourism Development project.

The My Armenia program is a partnership with the Smithsonian Institution to greatly improve the cultural tourism sector through academic research, product/experience development, marketing, and training. So far the program has focused on identifying Armenia’s intangible cultural heritages and potential tourism activities around three hubs; Alaverdi, Areni and Goris. The next phase of the project will be to train local service providers, including artisans and guides, and then create integrated packages that will be offered by tour companies to the international market (in parallel with a marketing campaign).

The Partnership for Rural Prosperity (PRP) program promotes rural economic development in Armenia by helping rural communities identify local growth opportunities, and improving access to finance and markets. Program partners include SME DNC, Gegharkunik Chamber of Commerce and Industry (GCCCI), and Center for Agribusiness and Rural Development (CARD).

The Advanced Rural Development Initiative (ARDI) has identified 48 rural communities in Syunik, Shirak and Lori marzes to assist with the development of rural value chains as a means of increasing incomes. ARDI builds the capacity of rural entrepreneurs to increase their revenues and create jobs for community members.

Both PRP and ARDI have targeted employment and entrepreneurship opportunities for women, youth and vulnerable groups in rural communities. Their beneficiaries include a wide range of small entrepreneurs, mostly B&Bs, many of whom were invited to attend AUA’s Ecotourism Conference in April 2016.

A complete list of these beneficiaries, cultural heritage attractions and artisan stakeholders should be collected and combined with other inventories (i.e. networks of B&Bs). Thus they can be mapped and their locations matched to existing and proposed hiking trails. HIKE Armenia can also discuss with USAID and Smithsonian the training programs and secondary infrastructure implementation that might overlap with networks of “world-class” hiking trails to be developed.

U.S. Peace Corps

Peace Corps has volunteers in every region of Armenia. As an organization, they are ready to contribute Peace Corps volunteers as a source of information and feedback in villages. The first step is to create a survey for volunteers requesting current capacity of their communities for ecotourism (attractions, guides, accommodation, etc.). This survey is currently being prepared and is scheduled to be sent out in spring 2017.
Government Bodies

Ministry of Nature Protection

This Ministry is responsible for PA management and also has a dedicated ecotourism department although nobody is sure of what it actually does. There is neither transparency when it comes to the allocation of funds towards ecotourism development nor is there any long-term strategy that would guide the industry towards a common goal. Management of PAs is often described as poor and a hindrance to utilizing Armenia’s natural wealth to develop sustainable ecotourism. Organizations such as WWF, TJS and CNF are working to introduce better management practices to the MNP and will be introducing ecotourism development plans for their review.

Development Foundation of Armenia (DFA)

DFA is an independent government agency and the state authority for investment, export and tourism. Established in 2014, DFA had been assigned by the RA government as the main agency for implementing tourism strategies at a national level. The State Tourism Committee has now adopted this role. Their marketing capability is viewed as their greatest strength yet there is currently a lack of any marketing strategy for promoting tourism in Armenia. With the recent creation of the State Tourism Committee, there was a great deal of uncertainty about their future role and how they will work together.

State Tourism Committee

This committee was launched in 2016 as part of the Ministry of Economy. They are now the state authority for tourism in Armenia. While they have been given a significant mandate for promoting tourism in Armenia, they are still in the strategic planning phase and currently do not have the required resources to begin implementing any significant projects that would produce a substantial positive impact. They have been very committed to meeting with all levels of stakeholders in order to produce a national tourism strategy.
Annex 1 - List of Meetings

- ARK Armenia (Armen Kazaryan, Siranush Vardanyan)
- Armenian Adventure Travel Association (Vladimir Grigoryan)
- Armenian Alpine Club (Mkhitar Mkhitaryan)
- Armenian B&B Association (Ophelia Petrosyan)
- Armenian Ecotourism Association (Zhanna Galyan)
- Armenian Geographic (Tigran Shahbazyan)
- Armenian Guides Guild (Lia Bakhshinyan, Robert Matevosyan)
- Armenian Hikers’ Association (Gevorg Gasparyan, Robert Assarian)
- Armenian Mountaineering and Hiking Federation (Suren Danielyan)
- ArmHiking NGO (Ashot Davtyan)
- AUA Acopian Center for the Environment (Alen Amirkhanian, Karen Aghababayan)
- Bellfree Contractors (Hans Keifer, Marine Petrosyan)*
- Caucasus Nature Fund (Arman Vermishyan, Geof Giacomini)
- Deutsche Gesellschaft fuer Internationale Zusammenarbeit (Kathrin Winterscheid, Wilhelm Hugo, Aram Babayan)
- Development Foundation of Armenia (Syuzana Azoyan)
- Foundation for Preservation of Wildlife and Cultural Assets (Eva Martirosyan)
- Geo4Dev (Alessandro Mambelli, Sean Reynolds, Arthur Domaljian)
- Homeland Development Initiative Foundation (Timothy Straight)
- IDEA Foundation (Edgar Manukyan, Armen Minassian, Armine Melik-Israyelyan)
- Janapar Trail (Raffi Kojian)*
- Kolba Labs (Max Perry)
- One Armenia (Anahit Galstyan, Charlotte Poulain)
- Transboundary Joint Secretariat (Karen Karapetyan)
- Transcaucasian Trail (Tom Allen, Vahagn Vardumyan)
- UK Embassy (Artashes Davtyan)
- UN Development Program (Artak Melkonyan, Arman Valesyan)
- UN Global Environment Facility (Hovhannes Ghazaryan)
- U.S. Peace Corps (Gayane Zargaryan, Hannah Frantz)
- Wild Trail Lodge (Andranik Miribyan)
- World Bank (Nora Mirzoyan)
- World Wide Fund for Nature (Karen Manvelyan)

* Via Skype
Annex 2 - Reference List of Collected Materials

- 2017 Hiking Activity Schedule (ArmHiking NGO)
- ARK Bridge Project Description (ARK Armenia)
- Armenia South Corridor Tourism Development Strategy (World Bank)
- Dilijan National Park Existing Trails (IDeA)
- Dilijan National Park IDeA Proposal (IDeA)
- Ecotourism Conference Contact Database (AUA Acopian Center for the Environment)
- First Mission Report of International Expert (WWF)
- List of Guides (HIKE Armenia)
- Map of Tatev National Park (IDeA)
- Map of Tourist Trails of the Arpi Lake NP (WWF)
- Map of Trails in Caucasus Wildlife Refuge (FPWC)
- Map of Trailbuilding Camp 2017 (TCT)
- Project Appraisal Document for Local Economy and Infrastructure Development Project (World Bank)
- Project Document: Integrated Rural Tourism Development (UNDP)
- Project Presentation: Integrated Rural Tourism Development (UNDP)
- Producer Contact List (HDIF)
- Terms of Reference for National Tourism Expert (WWF)
- Tourism Strategy (IDeA)
- Tourist Development Strategy for Dilijan National Park in Armenia (CNF)
- Tourist Development Strategy for Khosrov Forest State Reserve, Armenia (CNF)
- Tourist Development Strategy for Dilijan National Park in Armenia (CNF)
## Annex 3 – SWOT Analysis of Hiking Sector in Armenia

<table>
<thead>
<tr>
<th></th>
<th>Strengths</th>
<th>Weaknesses</th>
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| Internal | • Unique landscapes and natural areas offer a variety of options  
  • Newfound urgency to develop hiking infrastructure  
  • All the players are now more connected than before  
  • Resources starting to be invested in hiking infrastructure  
  • Potential for regional networks of ”world-class” trails  
  • Hiking is viewed as an important component of ecotourism | • Profit motive hindering cooperation and info sharing  
  • Disconnected projects and activities  
  • No cooperation across sectors of stakeholders  
  • No authority for coordinating actions  
  • Information is incomplete and isolated  
  • Lack of resources for would-be hikers  
  • Disconnect between ecotourism and conservation |
| External | **Opportunities**  
  • Growing number of tourists estimated to travel to Armenia  
  • Growing interest in hiking as an alternative activity  
  • Possibility of bringing in international experts  
  • Creation of database for ecotourism assets and stakeholders  
  • Creation of roundtable to act as coordinating body  
  • Integrated cross-border hiking routes with Georgia  
  • Use PAs to spur development in surrounding communities | **Threats**  
  • Destruction of natural areas (logging, forest fires, mining)  
  • Breakout of war between NKR and Azerbaijan  
  • No national strategy to guide actions  
  • RA government desire to control ecotourism activities  
  • Uncertainty over future RA government plans  
  • No trust between PA management and private tour operators  
  • Mismanagement of PAs  
  • Environmental damage from hikers’ poor practices |
## Annex 4 – Table of Investments

<table>
<thead>
<tr>
<th>Organization</th>
<th>Investment</th>
<th>Location</th>
<th>Project</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>World Bank</td>
<td>US$ 55 million</td>
<td>Southern Armenia</td>
<td>Southern Corridor Strategy</td>
<td>Loan to RA government for hard infrastructure</td>
</tr>
<tr>
<td>UN Development Program</td>
<td>US$ 3 million</td>
<td>Armenia</td>
<td>Integrated Rural Tourism Development</td>
<td>Soft skills training</td>
</tr>
<tr>
<td>IDeA Foundation</td>
<td>EUR 1.2 million</td>
<td>Dilijan and surrounding areas</td>
<td>Dilijan Tourism Development</td>
<td>Co-financing agreement with EU and RA government</td>
</tr>
<tr>
<td>World Wide Fund for Nature</td>
<td>N/A</td>
<td>Protected Areas</td>
<td>Regional Ecotourism Development in PAs</td>
<td>Cross-border ecotourism products</td>
</tr>
<tr>
<td>Transboundary Joint Secretariat</td>
<td>N/A</td>
<td>Protected Areas</td>
<td>PA Tourism Development</td>
<td>Matches every dollar spent by RA MNP</td>
</tr>
<tr>
<td>UN Global Environment Facility</td>
<td>US$ 50,000 per grant</td>
<td>Armenia</td>
<td>Distributing grants</td>
<td></td>
</tr>
<tr>
<td>Transcaucasian Trail</td>
<td>EUR 75,000 +</td>
<td>Armenia</td>
<td>Scouting and trailbuilding camp</td>
<td>Grants for 2016 and 2017</td>
</tr>
<tr>
<td>One Armenia</td>
<td>US$ 28,000</td>
<td>Armenia</td>
<td>HIKE Armenia</td>
<td>Mobile app, marketing</td>
</tr>
<tr>
<td>ARK Armenia</td>
<td>US$ 20,000</td>
<td>Syunik marz</td>
<td>ARK Bridge Project</td>
<td>Connecting Tatev to Kapan</td>
</tr>
<tr>
<td>Armenian Hikers' Association</td>
<td>Undisclosed</td>
<td>Armenia</td>
<td>Marking and mapping existing trails</td>
<td>Fundraising ongoing in USA</td>
</tr>
<tr>
<td>RA Ministry of Nature Protection</td>
<td>Undisclosed</td>
<td>Armenia</td>
<td>Managing PAs</td>
<td></td>
</tr>
<tr>
<td>Development Foundation of Armenia</td>
<td>Undisclosed</td>
<td>Armenia</td>
<td>Marketing and website</td>
<td>Marketing</td>
</tr>
<tr>
<td>State Tourism Committee</td>
<td>Undisclosed</td>
<td>Armenia</td>
<td>Policy planning</td>
<td></td>
</tr>
</tbody>
</table>
Annex 5 - List of Secured Hiking and Ecotourism Domains

www.ecotourism.am

www.ecotourismarmenia.org
www.ecotourismarmenia.am

www.ecoarmenia.com
www.ecoarmenia.am
www.ecoarmenia.org

www.hikearmenia.org
www.hikearmenia.am

www.hikingarmenia.org
www.hikingarmenia.am

www.bikearmenia.org
www.bikearmenia.am

www.bikingarmenia.com
www.bikingarmenia.org
www.bikingarmenia.am

www.trailsarmenia.com
www.trailsarmenia.am
www.trailsarmenia.org