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for Yalkezian Foundation

HIKING TRAILS PROJECT

Baseline study
August-2018



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Research objectives and methodology

Based on the specifications provided by Yalkezian Foundation, Mosaic A-M LLC carried out a study with the following research objectives:

1. Description of hiking tourism in Armenia
2. Identification of the potential stakeholders of the Trails Project in Armenia, and any similar or related projects or initiatives that might be in synergy with, or possibly overlap with or hinder the Project.
3. Estimation of the possible impact of the Project in terms of:
 - Poverty reduction and job creation
 - Other possible ways that affected communities might benefit from the project (including but not limited to environmental benefits)
4. Review relevant public policies and legislative framework (both at central and local governance level) that might support and/or hinder the Project.

Based on the scope and objectives of the study, a combination of the following data collection methods was applied: 1) Desk research, and 2) Face-to-face interviews with core stakeholders identified by desk research.

The interviews were conducted in accordance with a question guide designed in cooperation with the Yalkezian Foundation.

Chapter 1. Incoming tourism in Armenia

Overview

The sector of tourism is always considered as an important aspect for countries' economic development and growth and Armenia like other developing countries is trying to find ways for becoming more competitive in the world market. And indeed, according to official data the tourism industry faced significant positive changes during last years with increasing contribution to GDP. According to World Bank data number of arrivals to Armenia reached 1,260,000 in 2016 from 45,000 in 2000¹. The state Committee of Tourism noted that during only the first half of 2017 1,350,791 people entered Armenia (24.3% increase compared to the indicated period of 2016). The Statistical Committee of the Republic of Armenia provided the following breakdown of visiting international tourists per countries of origin for 2015-2016².

Table 1. Country breakdown

<i>Country</i>	<i>2015 January-December (% out of total 1,192,120 tourists)</i>	<i>2016 January-December (% out of total 1,259,657 tourists)</i>
<i>CIS countries</i>	26.7	25.7
<i>Russia</i>	22.1	21.7
<i>Ukraine</i>	3.1	2.3
<i>Other CIS countries</i>	1.5	1.7
<i>EU countries</i>	26.1	25.8
<i>France</i>	6.2	5.3
<i>Germany</i>	5.2	6.3
<i>Italy</i>	2.8	3.1
<i>Netherlands</i>	0.7	0.7
<i>UK</i>	3.2	3.1
<i>Other EU countries</i>	7.9	7.4
<i>Other countries</i>	47.2	48.5
<i>Canada</i>	1.6	2.1
<i>Georgia</i>	2.6	3.3
<i>Iran</i>	10	17
<i>Turkey</i>	1.1	0.5
<i>USA</i>	15	9.6
<i>Other countries</i>	16.9	16.1

Speaking of incoming tourism in Armenia, it is important to mention, that because of historical and political events of the last century the vast majority of the tourists visiting Armenia during the last decades were diaspora Armenians. They were coming to Armenia either to visit family members and relatives or just out of desire to return to the homeland for a short period of time. This practice continues till present days (with most of the people entering Armenia being Armenians from around the world), but at the same time the number of foreign travelers who choose Armenia as tourist destination increases every year. The domestic tourism also tends to increase. According to the

¹ <https://data.worldbank.org/indicator>

² <http://armstat.am>

National Statistical Service the number of domestic travelers hosted in Armenian hotels was 979,968 in 2016 (12.4% increase compared to 2015).

Emerging tourist facilities in Armenia on one hand and on the other hand, the new tendencies of world tourism can explain the increasing number of tourists. Different studies suggest that for many tourists Europe, USA and other top tourist destinations are not the first choice anymore, even though they are still leading the world tourism market (according to World Tourism Organization top rankings are as follows for 2016 in terms of international tourist arrivals: France, USA, Spain, China, Italy, though in terms of international tourist receipts USA is leading, followed by Spain, Thailand, China and France correspondingly)³.

These new tendencies lay ground for the development of tourism sector for developing countries. In the rankings of World Economic Forum Armenia appeared in 84th place from 136 countries in 2017 with the 3.53 Travel & Tourism Competitiveness Index (Armenia climbed up 5 steps since 2015)⁴.

Economic Impacts

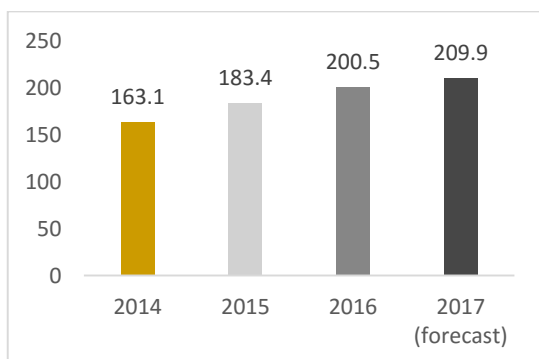
The contribution of tourism to the economy of Armenia is described in the annual reports of World Travel & Tourism Council (WTTC). The reports speak of direct and total contribution to GDP and employment⁵.

According to WTTC “the direct contribution of Travel & Tourism to GDP reflects the ‘internal’ spending on Travel & Tourism (total spending within a particular country on Travel & Tourism by residents and non-residents for business and leisure purposes) as well as government ‘individual’ spending -spending by government on Travel & Tourism services directly linked to visitors, such as cultural (e.g. museums) or recreational (eg national parks)”, while “the total contribution of Travel & Tourism includes its ‘wider impacts’ (i.e. the indirect and induced impacts) on the economy. The ‘indirect’ contribution includes the GDP and jobs supported by: Travel & Tourism investment spending; Government ‘collective’ spending; Domestic purchases of goods and services by the sectors dealing directly with tourists – including, for example, purchases of food and cleaning services by hotels.

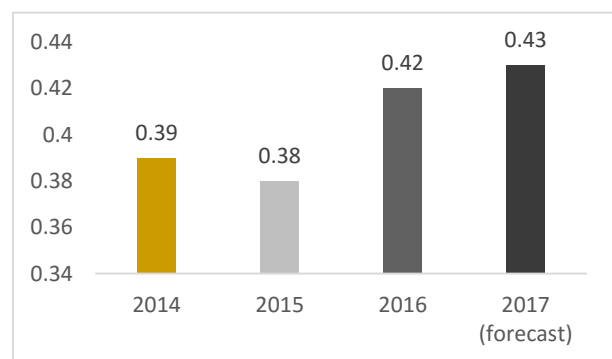
According to the reports in 2016 the direct contribution of tourism to GDP amounted USD 0.4 BN (3.8% of total GDP in 2016).

Chart 1. Direct contribution of travel and tourism to GDP 2014-2017 in AMD and USD

In AMD BN



In USD BN



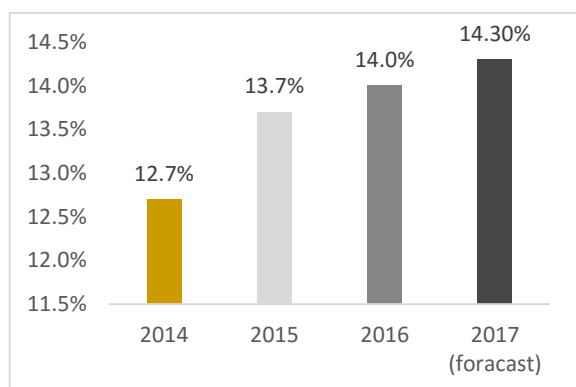
³ [UNWTO Tourism Highlights 2017 edition](#)

⁴ www3.weforum.org

⁵ www.wttc.org

The total contribution to GDP including indirect and induced impacts was USD 1.5 BN (14% of total DGP) in 2016 and is forecasted to rise by 4.6% to USD 1.6 (14,3% of total GDP) in 2017.

Chart 2. Contribution of travel and tourism to total GDP 2014-2017 (%)



Based on WTTC report in 2016 the sector of tourism supported 38,500 jobs directly and 143,500 jobs in total (12,2% of total employment). According to WTTC forecast these numbers are expected to increase to 43,000 and 156,000 (12,5% of total employment) by 2027.

The estimates of WTTC show that the visitor exports were USD 918.4 million in 2016 (28% of total exports), while the average receipt per arrival according to other sources was USD 785.1⁶. The State Committee of Tourism targeted to increase this number to USD 1,000 by 2020.

Non-official sources estimated that the share of leisure and entertainment in the domestic tourism amounted to 71%, 17.5% were business trips and 6% other purposes. In 2016 the leisure spending (inbound and domestic) generated 82.1% of direct travel and tourism GDP according to WTTC, while the business spending generated 17.9%. The breakdown of travel and tourism GDP in terms of foreign and domestic spending is as follows: 81.6% generated by international tourism receipts and 18.4% by domestic travel spending. WTTC forecasts the growth of all the above-mentioned components in 2017.

Infrastructures

According to State Committee of Tourism currently there are over 400 functioning accommodation establishments all over Armenia including hotels, hostels, inns and B&Bs (36% in Yerevan and 64% in other marzes). This is a fast growing sector in Armenia, though the problem is that most of the hotels that meet international standards are concentrated in Yerevan leaving the rural tourism less accessible and attractive. Though a number of B&Bs and other affordable accommodation are emerging throughout the country the hospitality field still needs significant improvements to satisfy tourist requirements. Major improvements are needed in the field of road construction, as, unfortunately, many parts especially remote villages with historical places of Armenia are beyond the reach of potentially interested tourists.

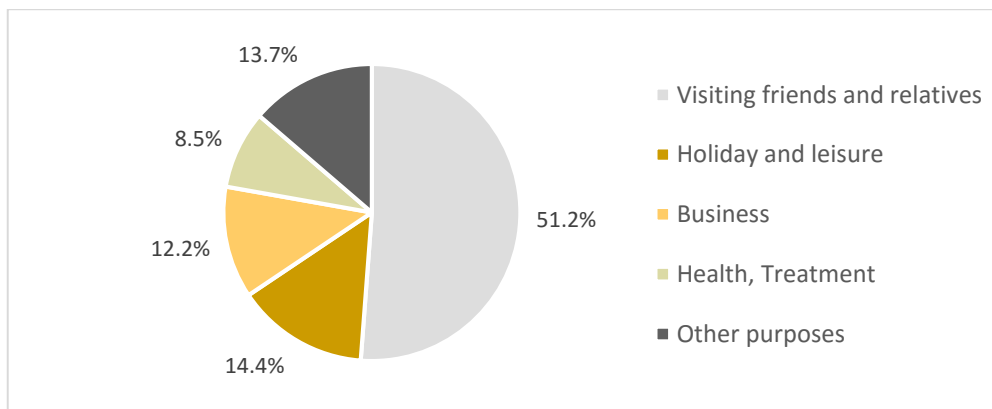
⁶ <https://www.export.gov/>

Chapter 2. Types of Incoming tourism and preferred tourist attractions/destinations in Armenia

Even though Armenia, considering its rich cultural and historic heritage and the increasing variety of attractions, has a big potential to become an attractive destination for tourists, there are still many challenges ahead for realizing its full potential. The challenges are relating to the lack of tourism infrastructures satisfying the international standards and needs of foreign tourists, little awareness, promotion and branding of Armenia as a tourist destination. Those issues might not be hindering diaspora Armenians from visiting the homeland, but they should be addressed in order to target more international visitors.

The State Committee of Tourism of the Republic of Armenia presented the following breakdown of arrivals to Armenia per purpose of trip⁷.

Chart 3. Purpose of trip



Throughout its long history dating back to 9th Century BC, and then becoming the first official Christian country in the world, now-days Armenia maintained its rich cultural and religious heritage making it a unique spot on international tourism map. Hundreds of pagan monuments dated back to 5000 BC, monasteries and church complexes are spread around the small territory of Armenia (30,000 km²), representing high religious and historic significance. UNESCO listed 3 World heritage sites in Armenia and 4 more sites are on its tentative list⁸:

World Heritage sites:

1. Cathedral and Churches of Echmiatsin and the Archaeological Site of Zvartnots
2. Monasteries of Haghpat and Sanahin
3. Monastery of Geghard and the Upper Azat Valley

Tentative list:

1. The archaeological site of the city of Dvin
2. The basilica and archaeological site of Yererouk
3. The monastery of Noravank and the upper Amaghov Valley
4. The monasteries of Tatev and Tatevi Anapat and the adjacent areas of the Vorotan Valley

⁷ [Tourism Development of The RA](#), State Committee of Tourism

⁸ <https://whc.unesco.org/en/statesparties/am>

Besides offering an outstanding ancient and medieval architecture, Armenia can also claim to become a leading tourist location grace to its unique mountainous landscapes, wild nature, culinary and winery traditions.

As stated in the official tourism website of Armenia developed by the State Committee of Tourism and Development Foundation Armenia: “Tourists visit Armenia mainly for the spectacular nature, unique architecture, religious sites, and favorable weather⁹”. And accordingly tour packages offered by private travel agencies¹⁰ are in this framework, including most popular pilgrimage tours (also called classic Armenian tours), wine and gastronomic tours, Armenia heritage tours and hiking tours.

Unfortunately, many of the above-mentioned attractions are located in remote undeveloped areas and villages. The absence of tourism infrastructures, such as proper accommodation and roads, transportation, hiking routs make those places unreachable for foreigners. Other issue for individual travelers interested in adventure/extreme tourism and willing to explore Armenia without guides include the language barrier, absence of clearly mapped hiking routs with travel signs and lavatories, information centers, etc. It is notable that according to many Airbnb hosts in Yerevan their visitors chose Georgia for hiking and then come to Armenia. The majority of them have no exact plans for Armenia and always ask for recommendations.

As shown in the previous chapter most, of the quality accommodation facilities, as well as entertainment, food and beverage spots are still concentrated in the capital Yerevan, while other regions of Armenia are less active and attractive, but given the above mentioned potential and the variety of cultural and natural highlights, there is undoubtedly a promising perspective for the development of Armenian rural tourism market.

Speaking of Yerevan, we should note that it is becoming a popular tourist location taking into account its low crime level, cheap living costs (Expatistan listed Yerevan in the cheapest cities of the world, its rank is 333 out of 347), the variety of offered attractions, nightlife and quality services (based on international tourist reviews). Yerevan hosts annual international festivals and events attracting many tourists such as Golden Apricot International Film Festival, ReAnimania Yerevan International Animation Film and Comics Art Festival, High Fest International Performing Arts Festival, Aurora Prize international humanitarian award. Among other popular festivals are Areni Wine Festival, Yerevan Wine Days, Dolma Festival, Yerevan Jazz festival (suggested also by Lonely Planet) and others.

OK Google, what to do in Armenia?

It is hard to track the exact rout of international tourists and no such statistics are available on this though we can highlight the most popular destinations suggested in the web based on which international travelers can plan their trip to Armenia. It is notable, that before recently there was no official Armenian tourism website with coherent travel information aimed at promoting the country as a tourist destination. Generally speaking, there is still a lot to be done for branding and promotion of Armenian tourism market on the State level. From this perspective launching armenia.travel

⁹ <https://armenia.travel/en>

¹⁰ E.g. <http://onewaytour.com>; <https://barevarmenia.com>; <http://www.exoticarmeniatours.com>

website and establishing tourist information points in Yerevan city center can be considered as the first steps undertaken by State Committee of Tourism.

Though this research did not aim at recommending the possible locations for trail building, the suggested “THINGS TO DOs” and top destinations outside of Yerevan by some of the major travel companies and internet search engines, can be taken into account during the implementation of the Project.

Image 1: Google



Google also suggests separately hiking destination in different marzes of Armenia¹¹ (mainly in Tavush marz) such as:

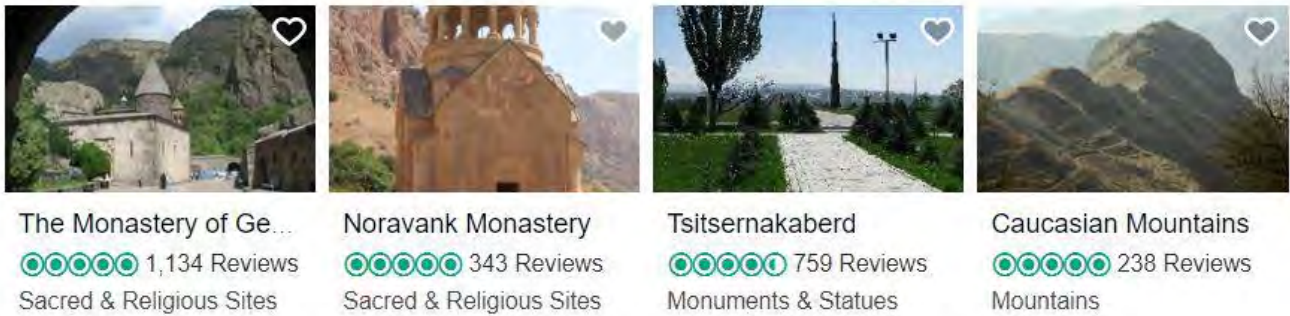
- Yenokavan, Tavush
- Gosh, Tavush
- Dilijan National Park, Tavush
- Yeghegis, Vayuts Dzor
- Ltsen_villages, Syunik
- Gandzakar, Tavush
- Artanish, Gegharkunik
- Lake Arpi, Shirak
- Sevan National Park, Gegharkunik
- Tshgkunyats Mountains, Kotayk/Aragatsotn

¹¹ <https://www.google.am/destination>

Image 2: Tripadvisor

Top Things to do

See all

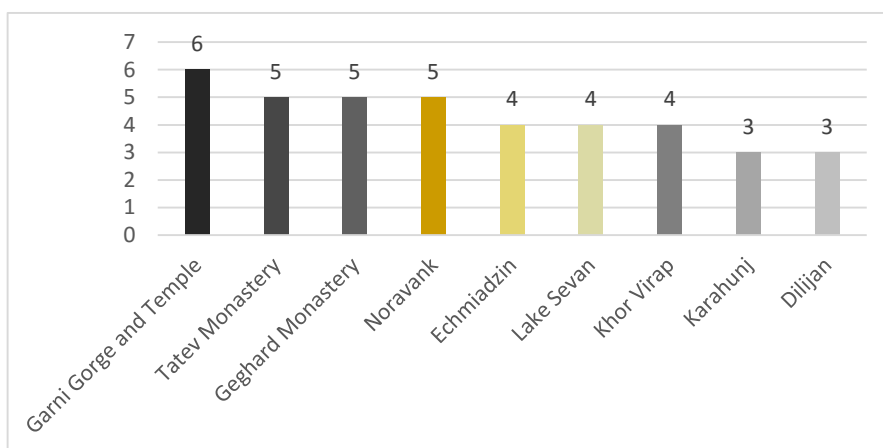


Though according to Tripadvisor most popular destination in Armenia is Yerevan, followed by Dilijan, Tsakhkadzor, Gyumri and Goris¹², if we filter out the categories related to the scope of the Project, we will have the following destinations most rated and reviewed by the travelers¹³.

- Caucasian Mountains
- Lake Sevan
- Garni Gorge
- Noravank Gorge
- Mount Aragats

Chart 4 below demonstrates most frequently suggested locations by Google, Tripadvisor, Lonely Planet, holidayme.com, wowtravel.me, velvetescape.com, thecrazytourist.com and atlasobscura.com.

Chart 4: Most frequently suggested destinations



Among other less frequently mentioned destinations are Selim Pass, Cave City of Khndzoresk, Debed Canyon, Arpi Lake, Mount Aragats, Yeghegis Valley, etc.

¹² <https://www.tripadvisor.com/Tourism-g293931-Armenia-Vacations.html>

¹³ <https://www.tripadvisor.com/Attractions-g293931-Activities-c57-t53,57,66,68,162-Armenia.html>

Chapter 3. Rural [eco]tourism in Armenia

The interest towards tourism sector is growing among international and local organizations involved in community development activities in Armenia. Given the potential of rural (mountain/adventure) tourism market and the possibilities for rural population to generate income from tourism a number of NGOs and institutions started taking actions and investing in the field. The success of rural [eco]tourism in Armenia can also be assured by the fact that now days tourists prefer exploring new less “trendy” places, share the local experience, communicate with locals, of course, by spending less money on their vacation. The development projects implemented by key stakeholders include financing B&Bs, assisting and training the local population about B&B management and marketing, building a few hiking trails, improving the infrastructures, reconstructing historical and cultural monuments, establishing tourist information centers, making promo materials.

Below are listed the identified stakeholders involved in [eco]tourism and/or in community development projects that directly or indirectly relate to the scope of the Project.

Idea Foundation

Focused on community development projects in Syunik and Tavush regions of Armenia, Idea Foundation’s mission is *“making it [Tatev region] the leading cultural and spiritual destination in the region and creating an unforgettable experience for tourists”* and *“to turn Dilijan into a prosperous and impressive cultural, educational, and resort center”*¹⁴. The scope of **“Tatev Revival Project”** (launched in 2008) include restoration of 9th-century Tatev monastery; Construction of the Wings of Tatev ropeway to make Tatev easily accessible for tourists and locals (the longest reversible cable car in the world); Development of local communities by training to start new businesses in the hospitality sector, engagement in social projects and providing jobs to locals. As stated in their report¹⁵ the project implementation resulted in 12x growths of tourist traffic, establishment of over 20 B&Bs, establishment of traditional cuisine restaurant and smaller cafes, creation of 77 permanent jobs for the locals. As an extension to “Tatev Revival Project” Idea Foundation is implementing **“Tatev Southern Touristic Hub”** program aiming at transforming Tatev to a major touristic hub involving other nearby territories (Goris, Sisian, Kapan, Meghri, Vayots Dzor). The project targets further restoration of the Monastery, large-scale development of tourist infrastructure (B&Bs, cafes, playgrounds, etc.), revival of the abandoned medieval villages, and the creation of Tatev National Park in cooperation with World Wildlife Fund. Further steps of the latter project will be carried out after Government approval. 14 hiking trails have been developed by the Foundation in the surrounding areas of Tatev-Vorotan gorge, Tatev village, Svarants village and across the road connecting Shinuhayr village to Tatev monastery (a detailed map of the trails provided by the Idea Foundation is presented in the annex 3). Currently, Idea Foundation supports only two of the trails “Tatev-Mets Anapat-Devil’s Bridge” and “Halidzor-Old Halidzor”. The rest of the trails are mapped and signed, though they are not included in hiking tours offered by the Foundation.

¹⁴ <https://www.idea.am/>

¹⁵ <http://investmentprojects.am/media/2017/01/58.pdf>

Besides, with USAID financing trainings for local guides were organized in cooperation with the Smithsonian Institution aimed at ecotourism and community development: *“At the end of the training, seven residents of the Tatev region were officially accredited and given the opportunity to work as guides on hiking tours”*.

In cooperation with EU Idea Foundation is currently implementing Dilijan Development Initiatives project aimed at Dilijan National park promotion by improving some (about 30 km) of the existing 12 hiking trails built in the past (1950s). The Foundation marks and signposts the trails. The renovated trails will be connected to Transcaucasian Trail. The final goal of the project is the development of the surrounding territories of Dilijan, so the trail locations were chosen correspondingly in nearby villages (Haghartsin, Hovk). The duration (2 hours to 1 day) and locations of trails were designed based on an expert research and consultancy. According to Tatev Sargsyan’s words (Idea Foundation representative responsible for development projects in Tavush marz), the current infrastructures can attract only extreme tourists, but others will not hike without clear maps (GPS) and signs. Besides, additional entertainment activities should be offered to the tourists, such could be meeting with the locals, food and drinks, horse-riding activities, to make the hiking experience more attractive, especially in some villages, where currently there is nothing to do except hiking. By developing the trails, passing through these villages, the Foundation creates employment opportunities for the locals. For this purpose, the Foundation created a database of local beekeepers, B&Bs, horse riders to be referred to the tourists. From the sustainable rural development perspective the Foundation achievement is the engagement of community members into trail building. This is an additional income for them, that can replace the income received from illegal tree cutting. One of the objectives of the project is to explain to the locals that they can benefit responsible attitude to the nature. The Foundation encourages the active participation of different trail building organizations. *“The interest and involvement of many donors directly impacts the perception of the locals and encourages them to take the matter seriously”*, noted Tatev Sargsyan.

In the scope of Dilijan Development Initiatives *a Touristic Information Center (TIC) will be established in Dilijan and will become the central point of all tourist and recreational activities in the region. Through the project, the hiking trails in Dilijan National Park will be refurbished and Dilijan City Market, Agro Pavilion as well as Arts and Crafts Center will be created to cater to both locals and visitors*¹⁶.

Further development of tourist adventure activities (hiking, trekking, mountain biking, camping) is included in Idea Foundation’s plans.

USAID

USAID’s involvement in rural development activities from the perspective of ecotourism and sustainable income generation can be demonstrated through 3 ongoing projects¹⁷ launched since 2013, that relate to the scope of current Project. **“Partnership for Rural Prosperity”** (2013-2018) aims at empowering rural communities in all marzes of Armenia with economic growths by transfer of

¹⁶ <https://www.idea.am/news/>

¹⁷ <https://www.usaid.gov/armenia/economic-growth-and-trade>

knowledge and entrepreneurial skills, infrastructure upgrade and identification of local competitiveness. **“Advanced Rural Development Initiative”** (2013-2018) targeting Syunik, Shirak and Lori marzes aims at increasing rural employment through supporting three economic sectors: dairy processing, fruit processing and rural tourism. Beneficiaries of these two projects are small business, mainly B&Bs.

In 2015 USAID launched another collaborative project with the Smithsonian Institution called **“My Armenia” Cultural Heritage Tourism Program** with the mission to *“harnesses the power of storytelling to strengthen cultural heritage sustainability through community-based tourism development”*¹⁸. My Armenia project is mainly focused on carrying out researches to highlight the cultural heritage including traditions, cuisine, arts and crafts unique to the specific community in order to further transform and brand those experiences into marketable products for rural cultural tourism development and promotion¹⁹. Smithsonian Institution is responsible for the soft component of MyArmenia Project, while the hard component (trail building, supporting B&Bs, etc.) is maintained my USAID or other donor institutions.

When the products are identified based on research findings, the Institution implements capacity building projects, as well as business orientation trainings for specific products. The trainings curricula includes insights into tourism market, pricing, sales, and practical trainings on how to communicate with the tourists, how to present the products (in this case, products include storytelling, village history, etc.), how to behave and smile while speaking to the tourist. These trainings are facilitated by international experts.

The Institution also trains local guides familiar to the unique cultural heritage and history of the given region. Training topics include geography, history, and architecture of each region.

The project started its operations in Lori, Vayots Dzor and Syunik marzez, and now is expanding target areas to Dilijan, Ijevan and Gyumri.

“We develop the products to fill the trails. Together with community members, we try to come up with possible products to be offered with the hiking trails. Smithsonian Institution is not implementing direct trail building activities or supporting B&Bs, though I think this is a very important component for rural tourism development. Local B&Bs have promotion issues, they do not succeed in presenting themselves in different platforms. Smithsonian Institution was not involved in activities promoting B&Bs, but I think we should start taking some actions”, told Sisak Mkhitarian, Smithsonian Institution representative.

Smithsonian Institution also supports product branding (logo, design) and sales activities. The products are presented to tour agencies for inclusion into tour packages. The Institution also works with the museums trying to add them to the list of visiting places offered by tour agencies.

The next targeted direction of the Institution is local cultural festivals that will go a step further from *“just serving barbeques”*.

In Mr. Sisak Mkhitarian’s opinion, the development of hiking tourism has a huge positive impact. This is very well demonstrated in Vayots Dzor, where the number of B&Bs already exceeds 25, while there were only 3 functioning B&Bs one year ago.

¹⁸ <https://folklife.si.edu/cultural-sustainability/my-armenia/smithsonian>

¹⁹ <https://www.smithsonianmag.com/travel/armenia-180960730/>

As a part of its promotion and marketing activities Smithsonian Institution, joint with AGBU (Armenian General Benevolent Union), recently developed a multi-media e-book²⁰ on Vayots Dzor marz to promote regional tourism. The president of AGBU Armenia noted: “AGBU actively supports the innovative ideas and products that contribute to the development of tourism as one of the most dynamic and promising sectors in Armenia.”²¹

As for the cooperation with other stakeholders, the Institution can assist in designing cultural tours and training the guides.

UNDP

In 2016 UNDP started its “**Integrated Rural Tourism Development Project**” (IRTD)²² (2016-2019) in partnership with Ministry of Territorial Administration and Development of Armenia. The goal of the project is somewhat similar to “My Armenia” project, it also aims at creating sustainable income generation opportunities for rural communities by:

- Raising the accessibility and sustainable utilization of tourism assets of the communities;
- Supporting the communities to thrive as a tourism destination by diversification of services and developing high quality products;
- Ensuring the sustainability of the rural tourism through establishing basic destination management mechanisms;
- Shape the identity of the communities as a destination of rural tourism and market it locally and internationally.

In the scope of the above mentioned project UNDP planned to create an inventory (the initial version of the data base is already accessible: <http://undp.rtd.am/login>) of touristic resources in all Armenian villages by a designed research methodology for further prioritization of tourism assets in each community (initial versio. Organizing specific trainings (business management, food processing, sales, marketing, training local guides, etc.) is another component of the project. UNDP promotes the concept of developing rural tourism through educating and engaging the local communities. For educational purposes, IRTD undertook the establishment of Tourism Research and Development centers in universities of all regions of Armenia in order to educate and support local communities in tourism development *in order to educate and support local communities in tourism development. R&D centers are unique institutions that aim to become a trademark for tourists in finding the best experience while traveling in Armenia.* 4 centers are implemented in Tavush marz, Gyumri, Vanadzor and Gavar. For engaging locals in the community tourism development IRTD plans to work with tour operators introducing them potentially interesting unknown tourist spots and guesthouses in the villages for including them in offered tour packages.

²⁰ https://www.avc-agbu.org/en/virtual_experience/eBooks/4.html

²¹ <http://www.agbu.am/>

²² <http://www.am.undp.org/>

UNDP recently supported a project to start rafting activities offering the tourists to explore mountain rivers in Lori marz. As far as this project is implemented, UNDP considers undertaking further steps for tourism infrastructure development in nearby villages (establishment of B&Bs).

UNDP is currently working on development of a wine route in Aragatsotn marz as an alternative to Areni wine route. Among UNDP future projects are the initiation of “Hay Bak” (Armenian yard) gastro tours, allowing tourists to try local food at rural houses and yard rentals, allowing tourists to spend time (dine and rest) in local houses.

With an emphasis on innovative projects, UNDP is trying to launch a new bike trail from Dilijan to Ijevan, which will pass on train rails. The project is approved, but is still pending due to lack of necessary engineering capacities in Armenia.

UNDP is open for cooperation with stakeholders who will implement sustainable projects. In case of trail building, the sustainability should be ensured by strong maintenance of the trails.

UNDP also initiated the “Bridge” network, which is supposed to be a platform for private tourism companies for discussions and elaboration of new rural tourism products. According to Dmitry Mariyasin, UNDP Resident Representative in Armenia “UNDP attaches importance to the partnership with the private sector and, particularly, to the role of tour operators in the development of rural tourism. Establishment of the “Bridge” network was one of the first decisions of the project. We believe that with joint efforts we can create competitive rural tour products, which the tour operators can sell and the rural residents – get additional income”.

German Agency for International Cooperation (GIZ)

GIZ supports the development of tourism sector in Armenia in the scope of “**Private Sector Development and Technical Vocational Education and Training South Caucasus**” (PSD TVET) program. Cooperating with State Committee of Tourism and Association for Sustainable Human Development NGO a workshop was organized in 2017 with the objective to outline the issues related to development and management of hiking trails, trail marking, best practices in successful ecotourism, market niche, and the product offer. In 2018 GIZ published a study on sustainable tourism development in Armenia²³ elaborated by AGEG Tourism for Sustainability expert Barbara Fritz. The study aimed at summarizing the existing situation of hiking tourism in Armenia and designing a strategy concept for the sector development. The main concerns revealed in the study were the absence of national or regional inventory for hiking trails; absence of standards for trail making/signposting; no countrywide coordination. These problems were highlighted also by the stakeholders interviewed in the scope of the current research, specifically Idea Foundation representative responsible for Tatev region development projects noted: “Recently, there is a huge enthusiasm for making hiking trails. Suddenly everybody wants to build trails. But the problem is that there is no coordination and communication between those activities”.

²³ http://ace.aua.am/files/2018/05/Barbara_Hiking_Strategy_new.pdf

During the interview GIZ representative highlighted the importance of education in all development projects. Vocational education is a priority area for GIZ and the cooperation with private sector and other institutions should include such components. “Our role, as well as of other organizations involved in tourism development activities in Armenia, is to bring economic growth to the local communities. On one hand, the trails should be attractive and should be mapped so that they pass through villages and on the other hand the villagers should be trained and be prepared to offer services to the tourist, including food and drinks, homestay, guiding on the trails, etc. In order to be able to maintain quality trails, we need to engage community members into the whole process”, noted Armine Ter-Israyelian.

GIZ will continue supporting local communities by capacity building activities in case new hiking trails are built with active tourist traffic.

Along with State Committee of Tourism GIZ designed guidelines and standards for trail making. The guidelines aim at standardizing trail signposting at national level and coming up with a united system allowing tourists to easily orient during the journey. The guideline is a two-page document called “Visual Guideline”. It is submitted to the Government of RA for final approval and is not public yet.

Foundation for the Preservation of Wildlife and Cultural Assets

With a private protected area of 5000 hectares bordering Khosrov state reserve in Ararat marz, FPWC²⁴ a partner of World Land Trust (an international conservation charity organization) was established in 2002 with the goal to protect and conserve the country’s natural heritage. The foundation’s activities also include environmental education and community and infrastructure development. Projects directly relating to the scope of our research implemented by the foundation are:

- **“SunChild Eco tours”**, aimed at raising awareness on environmental issues and creating employment through ecotourism, it offers hiking tour packages in the territory of FPWC, supports the establishment B&Bs (one eco lodge and 3 B&Bs were financed), organizes English language and hospitality trainings for the locals.
- **“The Fund for Organic Farming”** (supported by EU and FPWC) aimed at poverty reduction in Urtsadzor, Lusashogh, Lanjanist and Shaghap communities, the project targets over 5000 potential beneficiaries. The project envisions ensuring sustainable income for the community members through organic agriculture/horticulture, marketing of agricultural products, agro-tourism, eco-tourism, guesthouses, etc. To achieve its goal and encourage people to start small businesses the project organizes trainings and workshops for targeted households on business development, organic agriculture, as well as computer literacy and English language. In the scope of the project, local products such as herbs, fruits and honey are collected from the beneficiaries and packaged for sales. The project plans to organize eco-festivals, allowing the locals to represent their products and services.

²⁴ <http://www.fpwc.org/>

- **“Women for Nature”**, an OSCE funded project aimed at capacity building for the women from the above-mentioned communities, specifically facilitation of training courses on eco-tourism, marketing of homemade products and sustainable management of small business.



World Wildlife Fund Armenia

An official branch in Armenia to WWF Global, WWF Armenia²⁵ is involved in conservation and restoration activities of ecosystems, conservation of threatened species, development of protected areas of Armenia, supporting environmental awareness and education. WWF cooperates with the Ministry of Nature Protection to develop protected areas system. In the scope of the cooperation four new protected areas were established in Armenia (Arevik National Park, Zangezur and Khustup State Sanctuaries and Gnishik Protected Landscape). WWF also undertakes some community development projects in the nearby territories of the protected areas including development of ecotourism infrastructures (guesthouses and natural trails), supporting beekeeping, establishment of orchards and vineyards (provision of necessary agricultural machinery).

BarevTrails, firts volunteer group (source: <http://wwf.panda.org/>)

In 2018 WWF launched a 3-year project **“BarevTrails”**²⁶ funded by Wesser Foundation with the purpose to raise environmental awareness, develop and promote ecotourism in Armenia. The project expects to host over 60 volunteers annually to work on trail building, signposting, creating maps and promotional materials for new hiking trails in the protected areas. The geographic locations of the project are Ararat, Vayots Dzor and Syunik marzes. As a starting point of the project, a hiking trail in Tatev region connecting Tandzatap Village to the Devil’s Bridge was developed with the support of Trails for Change NGO. Undertaken activities were establishing tourist information points, installing informational signboards across the trail telling about the surrounding ecosystem and improving the trail in less accessible areas, construction of small bridges, cleaning the territory. The project plans to expand its activities to other regions of Armenia.

Trails For Change NGO



Construction of brifges by TFC (source:<https://www.trailsforchangengo.org/>)

Founded in 2017 Trail for Change²⁷ is a local NGO specialized in trail building, mapping and bridge construction. So far, the NGO operates in Syunik, Vayots Dzor and

²⁵ http://wwf.panda.org/wwf_offices/armenia/

²⁶ <https://barevtrails.com/>

²⁷ <https://www.trailsforchangengo.org/>

Tavush marzes of Armenia. In Syunik marz the NGO was involved in trail building activities organized by WWF. The Trails for Change NGO is working with the Transcaucasian Trail Project (TCT) on the construction of a new long-distance hiking trail across Armenia and Georgia. The NGO is involved in the construction of the trail segment in Tavush marz (from Parz Lake to Goshavank and from Dilijan to Haghartsin Monastery). Another trail was built starting from Hovk village in Tavush that will be connected to TCT. The operations in Tavush marz will continue in cooperation with Idea Foundation and EU in the scope of **“Dilijan community development initiatives”**, specifically 4 new hiking trails are being built in Parz Lake, Jukhtak Vank, Apakepar Mountain and Hidden Waterfall trail near Haghartsin Monastery. With co-financing from AGBU and EU, the NGO started implementing a new trail building project in Vayots Dzor in cooperation with Hike Armenia. The trail will connect Gomq Village to Martiros Village and will be a part of TCT.

Transcaucasian Trail Project

The project is aimed at building a world-class, long-distance hiking trail network across the Caucasus region. As stated in the project website the mission is *“to develop, promote, and maintain the Transcaucasian Trail in order to improve access to the region’s diverse cultural and natural heritage and encourage its preservation, benefiting local communities and trail users through the development of sustainable tourism”*²⁸. The network is supposed to have two northern and southern linked routes with



Rehabilitation and construction of the trail
(Source: <https://transcaucasiantrail.org/>)

overall distance of 3,000km. The northern route will connect the Black Sea to the Caspian Sea, while the southern route will start from the Black Sea and stretch across the territories of Georgia and Armenia to the Arax River at Armenian-Iranian border. Separate segments of the trail are already ready, but the final goal of the project is *to create a continuous uninterrupted trail that is fully marked and sustainably maintained, making the most spectacular areas of the Caucasus region accessible to all hikers*. In the Armenian part, the project is being implemented by several NGOs working on different segments of the trail, such as Hike Armenia NGO, Trails for Change NGO and Shen NGO.

HIKEArmenia

HIKEArmenia²⁹ started its operations as a project aimed at boosting the tourism industry in Armenia by building and improving hiking trails to make them more accessible to tourists. With a crowdfunding organized by ONEArmenia in 2016, HIKEArmenia developed a mobile app³⁰ designed to provide the

²⁸ <https://transcaucasiantrail.org/en/home/>

²⁹ <https://hikearmenia.org/>

³⁰ <https://techtension.am/>

travelers with information on existing trails, nearby accommodation options and connect them with hiking guides. The app is being updated as new trails emerge in different locations of the country (not necessarily developed by HIKEArmenia). HIKEArmenia is openly cooperating with other trail building organizations by adding all trails (details and pictures) on their website.

Later in 2017, Hovnanian Foundation supported the creation of HIKEArmenia as separate foundation to enhance its capacity and impact throughout the country *with the goal of developing the hiking infrastructure and resources throughout Armenia up to world-class standards*. HIKEArmenia's priorities include further development and investment in quality trail design and necessary hiking infrastructure, and worldwide promotion of Armenia as a hiking destination. HIKEArmenia was involved in trail building activities in Dilijan National Park and is currently working on trails in Gomk village in Vayots Dzor marz (from Gomk to villages Martiros and Artavan). The trail in Tavush was built in cooperation and with the methodological support of Transcaucasian Trail based on American practice of trail making. The aim was to design the trail in a "friendly" manner to foreign tourists corresponding to international standards with comprehensible signs. "Armenia needed those standards and infrastructures before entering the hiking tourism market. After one-year work we just started to market our services, because we understand that this is not just hiking, tourist should be able to receive the full package of services: trails, accommodation and guides", stated Artak Kosian, HIKEArmenia representative.

HIKEArmenia also undertakes promotional activities to attract larger number of tourists, which, according to most of the stakeholders is one of the most important issues to be addressed. For this purpose HIKEArmenia shoot a video telling about Armenia as a hiking destination to present it in different events, "The hiking market is very diverse. Influencers and popular bloggers should be involved in attracting the hikers through social media. For instance, we planned to apply to Backroads³¹ to start a cooperation, as they are interested in travelling to yet unknown and less famous places. There are also different types of hikers, some of them can sleep in tents after long walks, but some prefer more comfort stay after hiking, so they would like to be transported to nearby hotels. We should have all the options to offer".

According to Artak Kosian's words, the final mission of HIKEArmenia is to support the rural development. Along with trail building activities in Vayots Dzor, hospitality and language training are organized for community members willing to run B&Bs or start working as local expert guides. English speaking local guides will be added to the HIKEArmenia app creating an additional source of income for rural population.

It is notable that the number of B&Bs is rapidly increasing. Mr. Kosian said that at the beginning they had to search for interested individuals and encourage them to start B&Bs, now the locals ask for support and guidance on their own initiative, "The NGOs should show a complex approach in working with the locals to achieve better impact".

HIKEArmenia is cooperating with Fuller Center for Housing Armenia Charitable Organization (FCHA). The latter is renovating some parts of the local houses of those community members who want to turn

³¹ <https://www.backroads.com/>

their houses into guesthouses. HIKEArmenia also provides small grants for starting B&Bs and taking training courses.

Mr. Kosian also stated the lack of communication between the stakeholders. HIKEArmenia tries to gather all the information relating to hiking trails (coordinates, distance, etc.) in one place. Besides being helpful for the tourists, this will allow avoiding possible overlaps in trail building projects.

ARK NGO



Eco camp by ARK NGO (source: <https://www.arkarmenia.com/>)

ARK NGO³² is involved in ecotourism development activities in southern Armenia (Kapan region). ARK NGO built and marked several trails for over 100km and established first eco camps in the region. Currently the NGO is raising funds³³ to build new trails that will connect Tatev Monastery to Kapan and Shikahogh state reserve.

ARK NGO cooperates with Transcaucasian Trail and HIKEArmenia to create a trail network throughout the whole region. ARK trails are available on HIKEArmenia app.



Signs by ARK NGO (source: <https://www.arkarmenia.com/>)

Trails by ARK NGO

- | | |
|---------------------------------------|--|
| <u>Tatev Monastery</u> | <u>Bekh Anapat Monastery</u> |
| <u>Tatev-Devil's Bridge (5 km)</u> | <u>Bekh Village (5km)</u> |
| <u>Tatev-Aghvani (13.3 km)</u> | <u>Verin Vachagan (4.0 km)</u> |
| <u>Aghvani-Arajdzor (17.7 km)</u> | |
| <u>Dacha Trails</u> | <u>Mount Khustup</u> |
| <u>Arevashat (10.14km)</u> | <u>Nafcha Base Camp (10.3 km)</u> |
| <u>Kavart (9.1 km)</u> | <u>Khustup Summit (5.1 km)</u> |
| <u>Arajdzor - Kapan (14.5 km)</u> | <u>Shikahogh State Reserve</u> |
| <u>Voghji Valley</u> | <u>Other</u> |
| <u>Halidzor Fortress (1.05km)</u> | <u>Davit Bek - Tsakh Church (3.7 km)</u> |
| <u>Vahanavank Monastery (4.1 km)</u> | |
| <u>Vahanavank - Halidzor (4.2 km)</u> | |
| <u>Baqhaberd Fortress (1.5 km)</u> | |

Shen NGO

³² <https://www.arkarmenia.com/>

³³ <https://www.indiegogo.com/>

In the scope of supporting non-agricultural initiatives in poor rural areas, Shen NGO was involved in assisting rural entrepreneurs in establishing B&Bs since 2008. 15 B&Bs were established since the start of the project in Gegharkunik region (at the shore of Sevan lake). The project aimed at training the local community members on hospitality business, particularly B&B management. Taking into account the growing interest and previous success stories in the field Shen published a manual on Inn Management³⁴ for locals willing to start B&Bs.

Yalkezian Foundation

With the financial support of Yalkezian Foundation in 2017, Shen NGO constructed “Gosh-Khachardzan trail”, a 12 km hiking trail to be a part of Transcaucasian Trail.



“Gosh-Khachardzan” Trail (Source: <http://www.shen.am/node/1296>)

Armenian Hikers Association



Signs by AHA (source: <https://ahaarmenia.org/>)

The association (AHA) was established in Los Angeles USA with the mission to promote Armenia as a hiking destination among Armenians worldwide. AHA has 4 chapters: AHA Los Angeles, AHA Lebanon, AHA Istanbul and AHA Armenia³⁵. AHA’s objective is to support the development of adventure tourism in Armenia by improving the infrastructures. For this reason, the association is implementing a three-phase project: 1) Installation of stone marks on 36 popular trails in Armenia, illustrating the information regarding trail direction, location coordinates and warning signs. The phase is almost accomplished; 2) Building the “**Armenian Highland Trail**” that will stretch across Armenia and Artsakh connecting the villages and cultural/historic monuments. The phase is still in

fundraising process, though the association already begun the construction of some parts of the trails,

³⁴ <http://shen.am/>

³⁵ <https://ahaarmenia.org/>

specifically in Lori (from Odzun village to Tsahgkashat), Vayots Dzor and Gegharkunik (Kalavan village) marzes and build construction Artsakh (Shushi and Karin Tak village); 3) Building an **Adventure Village** based on successful experience of other European countries. During this phase, the association will select a rural community to make it a special adventure spot by building hiking, biking, off-roading, skiing and other infrastructures.

AHA representative Gevorg Gasparian, noted that the association does not have sufficient resources to support rural development activities other than trail building, though it is obvious that the larger the number of visiting tourists, the larger the demand for accommodation and other related services, so hiking tourism directly relates to community development.

According to Mr. Gasparian, the only major problem in the development of hiking tourism in Armenia to be addressed at the moment is the lack of tourist traffic. He suggests that targeted marketing and promotion campaigns should be carried out for German, Austrian, Swiss, French and Italian travelers. Mr. Gasparian finds that given the current number of hikers in Armenia, the existing infrastructures are enough and if properly planned, the tourists can be offered 10-15 days hiking tours on existing trails. The absence of proper signs does not represent an issue, as the majority of tourists uses GPS trackers. The priority for involved stakeholders should be finding ways to increase the number of tourists and then think of building new trails.

Armenian Adventure Travel Association

Armenian Adventure Travel Association³⁶ (AATA) was founded in 2016. *It is a public initiative involved in promotion and development of the environmentally friendly active recreation, adventure and ecotourism in Armenia.* The Association is a platform for the professionals, local tour agencies specialized in adventure tourism (hiking, trekking, paragliding, off-roading, mountain biking, horse riding, caving and rock climbing).

The association is not directly involved in trail building activities. Its mission is the development of adventure tourism by creating adventure tourism centers in rural communities. The association aims at establishing 4 centers that will provide necessary equipment for extreme tourism, including bike rentals.

According to AATA representative Vladimir Grigorian, “The tourists do not come only for hiking, they need additional services to have better experience. NGO and State programs mainly target B&B development, which is obviously very important, though the programs should not be limited only by those activities. The final goal is to make tourists stay in the community for more than 2 days. This can be achieved by offering them additional interesting activities, for instance engaging them in agricultural activities (milking, cheese making, collecting some berries and then preparing some jam out of them, etc.)”.

Mr. Grigorian was concerned about the lack of coordination and communication between the stakeholders resulting in many overlaps in trail building projects. Another highlighted issue was that a

³⁶ <https://www.armadventure.org/>

number B&Bs (renovated by donor institutions) were shut down early after the establishment due to the lack of tourists.

Armenian Tourism Development Foundation (ATDF)/ State Committee of Tourism

ATDF (previously a part of Armenian Development Foundation) is now attached to the State Committee of Tourism and is responsible for the implementation of Committee's annual plan. Development of ecotourism is listed in the Committee's priority areas and it encourages the stakeholders to take actions in the field. Current activities of the Committee directly related to hiking tourism are development of guidelines for trail building and signposting and creating a virtual map featuring all the major trails in the territory of Armenia.

Ministry of Nature Protection

Ministry of Nature Protection is involved in and responsible for ecotourism related activities in National parks (Dilijan, Khosrov, Sevan, Zangezur) and protected areas. The ministry cooperates with WWF, AHA, Transcaucasian Trail and other organization willing to build hiking trails in those areas. The projects can only be implemented after the authorization of the Ministry and in case they meet the Ministry requirements (the trails should not represent a threat to flora and fauna). So far, 5 eco routes were developed in Dilijan National Park with donor support, and more than 10 trails were built in Zangezur National Park by the efforts of the Ministry.

The Ministry representative noted, that they approved almost all hiking trail building projects so far (some adjustments to the trails might be required for final approval).

The Ministry can provide consultancy to trail building organizations on security issues regarding the locations of swamps, life-threatening animals (snakes, beasts), most dangerous seasons, etc.

Chapter 4. Legal framework

The research did not reveal any specific legal framework concerning hiking tourism in Armenia. During in-depth interviews, the stakeholders also did not mention any laws or regulations that in any way hinder the implementation of the project. Interested parties in trail building should present the project (mapping of the trail) to local authorities, Armforest SNCO or the state, in case the trail should pass through state protected areas, for the approval. After the consideration, the project executors might be asked to change certain parts of the trail and then receive the final authorization for project.

One of the stakeholders mentioned minor issues in getting the authorizations for trail building. Such difficulties occur, because the land is often divided between several communities and responsible authorities and to get the authorization the trail builders should apply to each involved party. The limits of authorization often change making it hard to find out who is responsible for certain part of the land. It is suggested to have clearer mapping of lands and assigned authorities.

Another regulation might be in place, if the Government approves the guidelines proposed by GIZ and State Committee of Tourism, further trail building project should be implemented in accordance with

specified standards, moreover already built trails should be changed in order to match the new standards. According to GIZ, many interested stakeholders took part in designing the guidelines, and the majority approved the final proposal. However, one of the stakeholders is arguing the guidelines, specifically mentioning, that they are against the materials to be used for signs, especially they are against to any kind of paints for signposting on the trails. Other stakeholders explain the pros to the guidelines by the fact that the existing signs all differ from each other in shape, color, material (possible reason to this is that the donor organizations from different countries require to make signs according to the standards of their own countries). This diversity can be confusing to the tourists travelling to many destinations in Armenia. For this purpose, it is suggested to have a unique signing system, so that the tourists know exact meaning of the sign in Dilijan and elsewhere.

The proposed guidelines suggest also, that the signs should contain information regarding potential threats on the trail and emergency numbers.

Chapter 5. Risks, constraints and suggestions

This chapter is a sum-up of the ideas highlighted by the stakeholders during the interviews.

- No standards for trail building bringing to a chaotic situation.
- Lack of trainings on ecotourism, nature protection and environmental awareness for the locals.
- No professional organization specialized in trail building with an extensive experience.
- The trail areas should be properly investigated and potential threats should be revealed unique to Armenia, such as poisonous plants/animals, unpassable/dangerous trail parts, stone falls/landslides.
- Geographical specifications of the trail areas should be considered very thoroughly. Trails might be damaged by frequent rains. There are mitigation measures to be taken into account, such as building the trail with a certain incline, so that the water does not stay on the trail. The durability of the trails should also be considered, especially in the areas where landslides are more likely to occur.
- Local rescue teams should be created to operate in each region.
- Trails passing through the border villages should be mapped very carefully.
- Trail building activities should be strictly regulated and coordinated on the State level from the perspective of nature protection.
- More consistency required from implementing organizations. There are many trails built with no future maintenance. For example, if the trail is not exploited during a certain period, it will disappear.
- More emphasis should be made on marketing and promotion.
- Cross communication between the stakeholders should be improved to avoid the overlaps in trail building projects.
- The lack of professional skills of new hiking guides. As the field is rapidly developing, the interest in becoming a hiking expert to organize tours is also growing. As a result, there are many guides not equipped with required skills and knowledge.

- Existing hiking trails should be aligned with international standards, including proper informational boards, lavatories, closed trash cans.
- The projects implemented by different NGOs are not sustainable. For instance, Information signs are installed, but the majority of them is already almost erased.
- Complex approach should be shown in working with community members. There were cases when the locals removed trail signs, because tourists do not need hiking guides on signed maps.
- In Tavush, locals who were cutting the trees from the forest removed the signs, obviously, preferring no one to hike in the nearby territories.
- The involvement of volunteers in trail building is good, but a permanent professional team should undertake the whole process of trail building.
- Different types of hikers should be considered. Even though there is a group of adventure/extreme lovers, who prefer the wild nature and hiking routes with no mapping or signs, the building of signed trails will allow targeting more people.
- Active community engagement in rural [eco]tourism development should be encouraged.
- The negative experience of Gosh Lake should be considered, when following the tourist traffic growth, many infrastructures were built in the surrounding area, trees were cut down causing serious damage to the location.
- Tree cutting (legal and illegal) can represent a risk for trails. The cut trees can fall on the trails.
- Trail building projects should have a strong maintenance component. If the maintenance is not properly insured the trails will easily become unusable in 2-3 years and the marks will be washed out by rain.
- The perspectives and benefits of ecotourism should be explained to the local communities.
- Initial budget planning and standards for trail building. It will be very useful for future trail builders to have an initial idea of how much 1km trail costs.
- Creation of pilgrimage hiking trail connecting the churches in Armenia.
- Success stories should be communicated across the regions.
- Building of hiking trails will not negatively affect the ecosystem in Armenia.
- Lack of entrepreneurial skills in rural communities.

Annexes

Annex 1. Stakeholder interview questions

1. What is to be done to make hiking tourism in Armenia more attractive?
2. What is the importance of trails in developing rural tourism in Armenia?
3. What is to be learnt from previous experience of trail making?

4. What will trail development change in your activities or work in general in terms of tourism development, poverty reduction and environment protection?
5. What will be your possible contribution to rural tourism development targeting poverty reduction and environment protection /promoting rural (eco)tourism/? How will trail development contribute to the increase of your projects/work effectiveness?
6. What is the legal framework for trail development /laws, government decisions, decrees, etc./? What laws are not in place that hinder trail development?
7. What risks would you advise to take into account when developing trails /regulations issues, life threatening and dangerous factors/?

Annex 2. List of interviewed stakeholders

GIZ Armenia, Armine Melik-Israyelian (Program expert)

UNDP, Arman Valesian (IRTD program coordinator)

Idea Foundation, Tatev Sargsian, Ani Davtian (Tavush and Tatev program managers)

Smithsonian Institution, Sisak Mkhitarian (MyArmenia project manager)

State Committee of Tourism/Development Foundation Armenia, Anahit Manasian (Chief specialist)

Ministry of Nature Protection, Vahagn Sargsian (Chief specialist, ecotourism division)

HIKEArmenia, Artak Kosian (Program manager)

Armenian Hikers Association, Gevorg Gasparian (Presidnet)

Armenian Adventure Travel Association, Vladimir Grigorian (Chairman/Co-founder)

Apres Zohrabian, expert guide

Annex 3. Map of Idea Foundation's trails

