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PROJECT PROPOSAL FOR THE GOVERNMENT OF THE REPUBLIC OF ARMENIA

Electric Regional Aviation in Armenia

A programme to improve access to Armenia's regions, 2027–2041



Architectural concept for a compact regional terminal with an integrated air traffic control tower.

15 years
Planning horizon

8 routes
Target network in 2041

6 aircraft
Target fleet, including a spare

Yerevan, November 2026

DECISION BRIEF

Executive summary

The proposal calls for scheduled domestic services using electric aircraft and the phased rehabilitation of regional aerodromes.

18.46–39.03
billion Armenian drams (AMD) for core infrastructure

$42–84m
Estimated cost of six aircraft

28.7k
Passenger journeys in 2041

The first phase, from 2027 to 2032, covers aerodrome surveys, design and preparations for service. Under the proposed timetable, electric flights from Yerevan to Kapan and Goris would begin in 2033. By 2041, eight routes could connect eight airports, including two direct routes between regions.

The state would fund aerodrome infrastructure. The airline would budget separately for its fleet and operations. The figures are planning assumptions. Each route would open once the aircraft and aerodrome have the necessary approvals, operations are ready and demand is sufficient.

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STRATEGIC RATIONALE

How better access can support regional growth

By investing early in transport links, the government can open up regional markets, services and visitor destinations and accelerate local economic development.

Transport and economic growth

“Together, we have the opportunity to make an economic leap,” said Prime Minister Nikol Pashinyan on 23 September 2019 (translated from his address). Armenia’s Economic Doctrine identifies transport infrastructure as a means of encouraging the movement of people and goods and stimulating economic activity. In a mountainous country, air services can complement road investment where terrain and distance make journeys long. [1–3]

The historical network

In the Soviet period, Armenia’s local air network had approximately 11 airports with paved runways, including Erebuni. Aviation official Dmitry Atbashyan gave estimates of 10 and 12 sites in different publications. Across 29,743 km², this amounts to roughly one airport per 2,700 km². Atbashyan described this density as one of the highest in the world. The project sources provide no comparable international ranking for the period. [4–6]

The 1985 Erebuni timetable documents departures from Yerevan. An archived regulation also mentions the Goris–Kapan route. This precedent supports assessing direct links between regions where road journey times and demonstrated demand justify a scheduled service. [7–8]

Why electric aircraft?

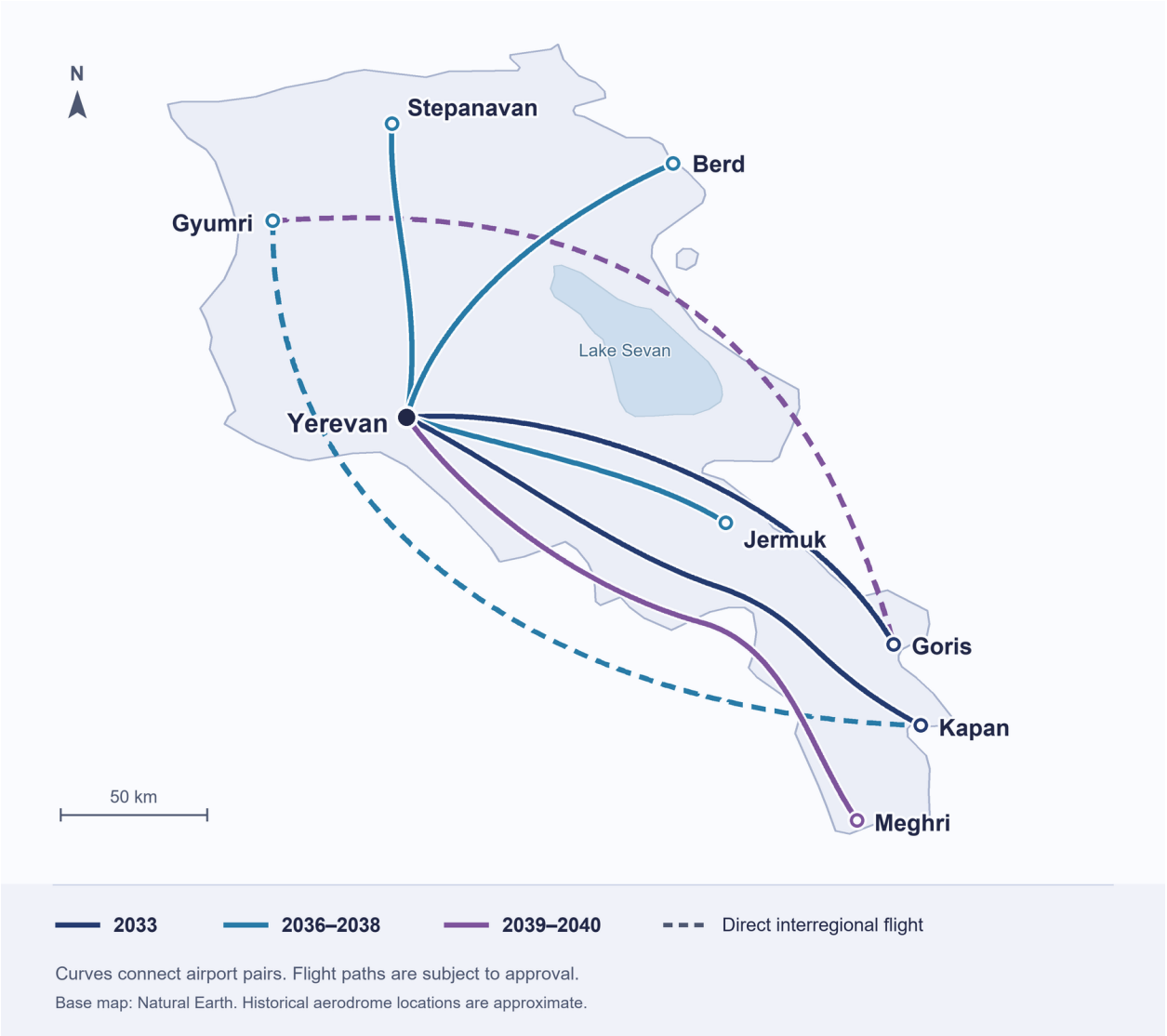
Electric propulsion is entering use in small civil aircraft. Designing the network for electric aircraft leaves room for competitive procurement. These aircraft produce no combustion exhaust in flight. Their life-cycle environmental impact depends on electricity generation, battery production and battery life. The airline budget and energy-use scenario are set out below. [10–12]

> **Programme priority**
>
> First prepare routes that offer substantial time savings for residents and businesses. Add direct interregional services as the fleet and aerodromes become ready.

ROUTE NETWORK

Phased route map

By 2041, the proposed network would comprise six routes from Yerevan and two direct links between regions.



Years indicate the assumed first season of service. Gyumri would be a second hub, with direct links to Kapan and Goris. Flight paths, approach procedures and alternate aerodromes would be determined before operations begin. [21–23]

DEMAND AND ACCESSIBILITY

How much time could a flight save?

Estimated one-way journeys between city centres. Air journey times include ground transfers, pre-departure procedures, the flight and time to exit the terminal.

Route	To airport	Before flight	Flight	Exit and transfer	By air	By car	Saved
Yerevan–Kapan	30 min	55 min	50 min	25 min	2:40	5:30	2:50
Yerevan–Goris	30 min	55 min	45 min	30 min	2:40	4:00	1:20
Kapan–Gyumri	12 min	42 min	70 min	26 min	2:30	6:30	4:00

Estimates are for one-way travel on a day with a scheduled flight, assuming typical road conditions. The wait for the next available flight, rescheduling and delays depend on the timetable and weather. [9, 24]

Proposed initial service

Route and year	Weekly round trips off-peak / peak	Annual round trips planned / expected	Passenger journeys per year
Yerevan–Kapan, 2033	7 / 10	404 / 356	8,423
Yerevan–Goris, 2033	2 / 4	130 / 112	2,369
First season, total	**9 / 14**	**534 / 467**	**10,792**
Kapan–Gyumri, 2038	1 / 2	62 / 55	1,098

Each round trip comprises two flight legs. One passenger journey is one passenger travelling on one leg. Totals are calculated before rounding.

Testing demand

The Yerevan–Kapan route reportedly carried 2,105 passengers in 2025. A timetable published in September 2026 offered up to 10 round trips a week. The 2033 scenario assumes substantial growth. It should be tested against bookings, employer surveys and passengers' willingness to pay. For Goris, the assessment includes visits to Tatev and business travel to Syunik. A low-frequency Kapan–Gyumri service is proposed once demand at the intended fare has been verified. [9, 24]

LAUNCH PLAN

The 15-year rollout

The timetable sets out the sequence of decisions, construction and route openings.

Period	Routes and fleet	Preparations and conditions for the next phase
2027–2032	Surveys and preparation. No project aircraft in service.	Inventory aerodromes and runways, collect weather observations, conduct site investigations and design charging facilities. Begin work at Kapan and Goris.
2033–2035	Yerevan–Kapan and Yerevan–Goris. 3 aircraft including a spare.	Confirm that both routes can be flown with the planned payload. Measure actual flight completion, demand and fleet turnaround times.
2036–2037	Berd in 2036, Jermuk in 2037. 4 aircraft including a spare.	Secure approval for civil approaches at Berd. Start Jermuk with seasonal daytime service pending confirmation that instrument operations are safe.
2038–2039	Stepanavan and Kapan–Gyumri in 2038, Meghri in 2039. 4 aircraft including a spare.	Verify interregional flight performance, charging at Gyumri and energy reserves. Decide on the runway foundation and geometry at Meghri.
2040–2041	Gyumri–Goris in 2040. Higher frequencies in 2041. 5 and then 6 aircraft including a spare.	Expansion depends on flight completion rates, demand, fleet availability and separate budget approvals.

Options beyond the core network

Sisian is a possible alternative to Goris or an alternate aerodrome. Gavar and Vardenis need a joint catchment assessment. Odzun and Yeghegnadzor require a review of access, terrain and competition from road travel. The base timetable assumes no scheduled flights at these sites.

Links around Yerevan

Short routes near the capital generally offer little time saving. Priority goes to routes where the road journey involves a long detour and demand is sustained. The first direct interregional links would serve Gyumri.

SCHEDULED SERVICE MODEL

The network by year

Annual projections reflect the seasonality of each route and the proportion of scheduled flights expected to operate.

Year	Routes	Peak round trips per week	Planned round trips per year	Expected round trips per year	Passenger journeys per year	Aircraft incl. spare
2027	0	0	0	0	0	0
2028	0	0	0	0	0	0
2029	0	0	0	0	0	0
2030	0	0	0	0	0	0
2031	0	0	0	0	0	0
2032	0	0	0	0	0	0
2033	2	14	534	467	10,792	3
2034	2	14	534	467	10,792	3
2035	2	14	534	467	10,792	3
2036	3	21	790	720	16,331	4
2037	4	24	880	800	18,218	4
2038	6	27	956	867	19,577	4
2039	7	30	1,034	937	21,194	4
2040	8	31	1,048	950	21,466	5
2041	8	41	1,413	1,280	28,673	6
Total	**—**	**—**	**7,723**	**6,956**	**157,832**	**—**

The base case gives **28,673 passenger journeys** in 2041. Varying seat occupancy by ±10 percentage points and flight completion by ±4 percentage points gives a range of **22,759–35,016**. With 17 seats available instead of 19, the same operating assumptions yield 10.5% fewer journeys.

Zeroes in 2027–2032 refer only to the new electric programme. The table excludes traffic carried by existing airlines. [24]

SCHEDULED SERVICE MODEL

Frequency and demand by route

Frequency is measured in round trips per week. The peak season is defined separately for each route.

Route	First year	Launch off-peak / peak	2041 off-peak / peak	Weeks in 2041	Journeys in 2041
Yerevan–Kapan	2033	7 / 10	10 / 14	51	12,655
Yerevan–Goris	2033	2 / 4	4 / 8	50	5,155
Yerevan–Berd	2036	2 / 3	2 / 4	48	2,500
Yerevan–Jermuk	2037	0 / 3	1 / 4	40	2,325
Kapan–Gyumri	2038	1 / 2	1 / 3	48	1,592
Yerevan–Stepanavan	2038	0 / 1	0 / 2	20	744
Yerevan–Meghri	2039	1 / 3	2 / 4	48	2,766
Gyumri–Goris	2040	0 / 1	0 / 2	24	936

How the figures are calculated

Planned round trips = off-peak frequency × (operating weeks − peak weeks) + peak frequency × peak weeks.

Expected round trips = planned round trips × flight completion rate.

Passenger journeys = 2 × available seats × flight completion rate × the sum, across seasons, of planned round trips multiplied by that season’s seat occupancy rate.

> **Worked example for Kapan in 2033**
>
> 7 × (50 − 18) + 10 × 18 = 404 planned round trips. At an 88% completion rate, 355.52 round trips are expected. With 19 seats and occupancy of 57% off-peak and 69% in peak season, 2 × 19 × 0.88 × (224 × 0.57 + 180 × 0.69) ≈ 8,423 passenger journeys.

Operating weeks by season and completion rates are set for each route. Sales data and aerodrome observations will inform revisions to the model. [24]

PUBLIC INFRASTRUCTURE

Capital budget by aerodrome

Preliminary capital estimates are in billions of Armenian drams (AMD), at constant 2026 prices. Runway budgets allow for major rehabilitation or full pavement reconstruction, depending on survey findings.

Aerodrome	First season	Capital cost, AMD bn	Works in the base case
Yerevan / Zvartnots	2033	0.70–1.50	Hub charging facilities and local grid connection.
Kapan / Syunik	2033	1.00–2.55	Surveys, lighting and weather equipment upgrades, provision for instrument operations subject to feasibility, and charging.
Goris / Shinuhayr	2033	3.11–6.60	Runway and buildings, night and instrument facilities, and charging.
Berd / Aygepar	2036	3.13–6.62	Runway and buildings, night and instrument facilities, and charging.
Jermuk	2037	2.73–5.63	Runway and buildings, night facilities and charging. Instrument operations require a separate phase.
Stepanavan	2038	3.11–6.60	Major runway rehabilitation, terminal, night and instrument facilities, and charging.
Gyumri / Shirak	2038	0.35–0.90	Charging facilities at the operating aerodrome.
Meghri / Agarak	2039	4.33–8.63	More extensive civil works, equipment and charging.
Core network	**8 aerodromes**	**18.46–39.03**	**Estimated public capital expenditure.**

Scope of the civil works

Works include site investigations, rehabilitation of the pavement and its foundation as conditions require, drainage, runway and ground areas, a compact terminal with a control room or tower, and the specified flight operations equipment. Budgets for operating airports cover only the works listed above.

For scale, investment in Kapan's earlier airport rehabilitation was reported at around AMD 2.5 billion when it opened. The programme estimates were calculated independently of that figure. VAT, land acquisition, major off-site utilities, special hydraulic works and ongoing maintenance are assessed separately. [13, 17, 19, 24]

PUBLIC INFRASTRUCTURE

Additional sites and the total budget

The additional sites provide options for comparison and possible expansion. Funding for each would follow a site survey, a catchment assessment and confirmation of suitability for civil aviation.

Additional site	Capital cost, AMD bn	Role to be assessed
Sisian	3.11–6.60	Alternative to Goris or a designated alternate aerodrome.
Gavar	3.91–7.60	Access to the western and central Lake Sevan basin.
Vardenis	3.91–7.60	Access to eastern Lake Sevan. Assess jointly with Gavar.
Odzun / Alaverdi	3.91–7.60	An alternative or complement to Stepanavan in Lori.
Yeghegnadzor	3.91–7.60	Local catchment in Vayots Dzor. Compare with Jermuk.
Additional sites, total	**18.75–37.00**	**Five sites with no scheduled service in the base case.**

Programme scope	Sites	Capital cost, AMD bn
Rehabilitation	10 aerodromes across the core and additional groups	35.16–71.08
Upgrades	Yerevan, Kapan and Gyumri	2.05–4.95
Full programme	**10 sites for rehabilitation and 3 operating airports**	**37.21–76.03**

Refining the estimates

Surveys will establish the condition of the pavement, foundation and drainage. At Meghri, they will also assess earth fill and the feasibility of extending the runway. Major rehabilitation is assumed at Stepanavan.

At operating airports, the scope and financing of works will be agreed with the operator, taking account of the concession terms. [17, 19, 24]

EQUIPMENT AND SERVICE RELIABILITY

Night operations, fog and charging

The programme would equip aerodromes for daytime and night flights, and for instrument operations where terrain permits suitable operating minima.

Package	Typical cost, AMD bn	Scope and commissioning requirements
Night operations	0.30–0.75	Runway lighting and, where required, approach lighting, PAPI, markings, inspection procedures and backup power.
Instrument operations, additional	0.40–1.00	Weather observations, communications, obstacle surveys, procedure design and validation, approval and publication.
Regional charging	0.35–0.90	Charging station, local grid connection and electrical safety equipment.
Yerevan charging hub	0.70–1.50	Hub charging equipment, peak load management and grid connection.

Visual and instrument approaches

A precision approach path indicator (PAPI) provides visual guidance on the approach slope. An instrument approach requires a published procedure with approved minima and the necessary aircraft, aerodrome and crew approvals. Each site will be assessed for RNP APCH using GNSS and, where needed, for an instrument landing system (ILS). Gyumri already has published instrument procedures. [14–18]

Factors affecting cancellations

Kapan, Goris, Berd and other mountain sites need seasonal visibility, cloud-base and wind data. Flight completion depends on obstacles, missed approach procedures, climb gradient and the energy available to reach an alternate. Below approved weather minima, flights would be rescheduled or passengers transferred by road.

Charging during peak operations

The power supply and number of chargers depend on charging time, battery temperature and remaining energy. Testing at Yerevan, Kapan and Goris should cover the loss of one charger and operations in both cold and hot weather. [12, 20]

AIRLINE

Fleet and airline budget

The fleet and operating budget is separate from public investment in aerodromes. All amounts are in constant 2026 US dollars.

Year	Fleet incl. spare	Aircraft added	Purchases, US$ m	Annual block hours	OPEX, US$ m
2033	3	3	21–42	760	2.26
2034	3	0	—	760	2.26
2035	3	0	—	760	2.26
2036	4	1	7–14	1,153	2.91
2037	4	0	—	1,260	2.98
2038	4	0	—	1,497	3.12
2039	4	0	—	1,649	3.21
2040	5	1	7–14	1,694	3.65
2041	6	1	7–14	2,353	4.46
Total	**—**	**6**	**42–84**	**11,887**	**27.10**

$60m
Fleet cost at $10m per aircraft

$4.70m
Start-up and one-off costs

$27.10m
Operating costs, 2033–2041

At $7–14 million per aircraft, the purchase of six aircraft, programme start-up and operations would cost **$73.80–115.80 million** over the full period, before revenue. Of the $4.70 million in one-off costs, $1.20 million covers programme set-up and $3.50 million covers introduction of the aircraft type. Purchase prices, lease rates and any operating support remain to be determined. [24]

Annual OPEX includes $0.55 million in central overhead, $0.42 million per aircraft including the spare, and variable costs. Variable costs = block hours including positioning flights ÷ (100/60 hours per round trip) × AMD 355,528 ÷ 360.54 AMD per US dollar. Period totals are $7.03 million in variable costs, $15.12 million in fleet costs and $4.95 million in central overhead.

AIRLINE

Electric aircraft and the cost of a round trip

Procurement depends on certification and demonstrated performance on the proposed Armenian routes at the planned payload.

Sizing the fleet

Two limits determine the operating fleet. Divide peak weekly round trips by 10 and peak weekly hours in use by 36. Round each result up and take the larger figure, then add one spare aircraft. In 2041, 41 round trips and 146.17 hours in use require five operating aircraft and one spare. The assumed 45-minute turnaround, including charging, needs to be verified.

Aircraft availability and operating approvals

The COMAC CE-25A made its first piloted flight on 14 November 2026. The concept specifies 19 seats and a design range of about 400 km. The manufacturer must confirm range with the actual payload and enough energy for reserves, a missed approach and diversion to an alternate. China's RX4E received a four-seat type certificate, illustrating progress in a smaller aircraft class. Other types may be available by the time of procurement. [10–11]

Variable cost per round trip	Assumption	AMD
Electricity	1,100 kWh × AMD 50.48/kWh	55,528
Battery	Reserve for battery replacement	120,000
Other variable costs	Scenario assumption	180,000
Total	**Before fixed costs and aircraft acquisition**	**355,528**

With L-410 fuel costs of AMD 400,000, the estimated energy saving is AMD 344,472 per round trip, or about 86%. The next page shows how much of that saving could cover a higher lease payment after battery reserves and airport fees. [9, 12, 24]

AIRLINE

Comparing one round trip

Yerevan–Kapan–Yerevan. The L-410 and the electric aircraft are assumed to carry the same number of passengers on each leg.

The model assumes AMD 400,000 for L-410 fuel and 1,100 kWh of electricity for the electric round trip. Other costs are assumed equal in the scenarios below. Fee savings are the L-410 fees less the fees charged to the electric aircraft. Historical cost benchmarks come from the Kapan service. [9, 12, 24]

> **Maximum additional lease cost per electric round trip**
>
> AMD 400,000 − electricity use in kWh × charging tariff − battery replacement reserve + fee savings. The electric aircraft costs less when its lease premium is below this threshold. If other costs differ, adjust the threshold by that difference.

Scenario	Tariff, AMD/kWh	Battery reserve, AMD	Fee savings, AMD	Maximum lease premium, AMD
Base tariff	50.48	120,000	0	224,472
Reduced fees for electric aircraft	50.48	120,000	50,000	274,472
High charging tariff	100.00	150,000	0	140,000
High charging and battery costs with reduced fees	150.00	200,000	50,000	85,000

Break-even limits when lease payments are equal

At AMD 50.48/kWh and equal fees, the maximum battery reserve is **AMD 344,472 per round trip**. With a reserve of AMD 120,000 and equal fees, the break-even tariff is **AMD 254.55/kWh**. Each threshold varies one input while holding the others fixed.

The AMD 50,000 fee reduction is illustrative. An aircraft-specific calculation requires a commercial offer, energy use for each leg, battery replacement terms and applicable fees. The thresholds identify the figures to request from the manufacturer and operator.

REGIONAL DEVELOPMENT

What the project would deliver for the regions

The public programme would be evaluated on access and service quality. Infrastructure and air service budgets would be approved separately.

Outcome	How to measure it
Access to services and jobs	City-centre to city-centre journey times by route, flight completion rates and the number of days when a same-day return is possible.
Business connectivity	Share of business travel, bookings requested by employers and seat occupancy outside the peak tourist season.
Tourism and local services	Seasonal passenger traffic, joint sales with hotels and tour operators, and booking conversion by season.
Service reliability	Weather and technical cancellations, actual charging times and spare aircraft availability.

Proposed government decision

1. Approve the 2027–2032 preparatory phase. Assign responsibility for site surveys, transport demand assessment, airspace coordination and aerodrome certification.

2. Fund preparations for the first phase at Yerevan, Kapan and Goris. Compare Goris with Sisian. Prepare a separate estimate for each site, including night equipment and instrument procedures as warranted by the assessment.

3. Obtain manufacturers' proposals, verify route feasibility and prepare fleet procurement terms. If a reliable timetable requires operating support, determine its amount and payment rules separately, with measurable requirements for service frequency, flight completion and accessibility.

> **Funding decisions**
>
> Approve rehabilitation and scheduled service once demand, aerodrome suitability and aircraft performance on the route have been confirmed. Evaluate the programme using transport and regional development indicators.

REGIONAL AIRPORT ARCHITECTURE

Meghri | Timber, stone and glass

Approximately 350 m². A futuristic pavilion in a mountain setting. Deep roof overhangs shade the glazing, a stone base anchors the terminal to the terrain, and the control room is integrated into the building.



ADKARS architectural concept for discussion with the architects. Floor area, siting, sightlines from the control tower and the room layout will be refined for each aerodrome.

REGIONAL AIRPORT ARCHITECTURE

Berd | Timber and rose tuff

Approximately 320 m². A compact terminal in the forests of Tavush. Timber and rose-coloured stone complement the surrounding greenery. The control tower forms part of the terminal.



ADKARS architectural concept for discussion with the architects. Floor area, siting, sightlines from the control tower and the room layout will be refined for each aerodrome.

REGIONAL AIRPORT ARCHITECTURE

Goris | Grey tuff

Approximately 350 m². A stone terminal for the highland steppe. Grey tuff, broad expanses of glass and a clearly defined silhouette give the building a strong presence in the open landscape.



ADKARS architectural concept for discussion with the architects. Floor area, siting, sightlines from the control tower and the room layout will be refined for each aerodrome.

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REGIONAL AIRPORT ARCHITECTURE

Meghri | A shaded pavilion

Approximately 380 m². A light-coloured pavilion for a hot mountain setting. A broad roof and recessed glazing shade the entrance and waiting area.



ADKARS architectural concept for discussion with the architects. Floor area, siting, sightlines from the control tower and the room layout will be refined for each aerodrome.

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REGIONAL AIRPORT ARCHITECTURE

Stepanavan | A terminal on the plain

Approximately 320 m². A low building in timber and warm-toned stone for the plain below the forested mountains. The control tower rises above the terminal roofline.



ADKARS architectural concept for discussion with the architects. Floor area, siting, sightlines from the control tower and the room layout will be refined for each aerodrome.

REFERENCE MATERIAL

Sources and assumptions

Policy, history and technical references. Links open the original publications.

[1] Economic Doctrine of the Republic of Armenia, Decision No. 16-L of 8 January 2026, paragraph 40. ARLIS

[2] Prime Minister's address of 23 September 2019 on the opportunity for an economic leap. The passage is translated in the Russian edition. Office of the Prime Minister

[3] Prime Minister's address on road investment and construction. Office of the Prime Minister

[4] Area of the Republic of Armenia. Government of the Republic of Armenia

[5] Dmitry Atbashyan's article on Armenian civil aviation estimates 10 airports. Hetq

[6] Dmitry Atbashyan's interview with Vzlyot magazine gives an estimate of 12 sites. Interview transcript

[7] Archived 1985 Erebuni timetable. National Library of Armenia

[8] Archived document listing the Goris–Kapan route. ARLIS

[9] Reported traffic and published frequencies for Yerevan–Kapan. Armenpress · Public Radio of Armenia

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[11] Type certification of the four-seat RX4E. Government of China

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Financial estimates, route calculations and traffic projections come from the ADKARS preliminary planning scenario. Aircraft market data and historical information are drawn from the publications cited.

REFERENCE MATERIAL

Aerodromes and the planning model

Operational documents, map sources and the basis of the calculations.

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[15] Validation of instrument flight procedures. ICAO Doc 9906, Part 5

[16] Published instrument procedures for Gyumri / Shirak. Armenian AIP, July edition · October edition

[17] Airport requirements and certification. ARLIS, requirements · ARLIS, certification

[18] Official airspace information and coordinates of operating aerodromes. Civil Aviation Committee

[19] Airport concession terms. Decision No. 93-A, clause 8.1(vii). ARLIS

[20] Study of power supply and charging infrastructure for electric aircraft. National Laboratory of the Rockies

[21] Boundaries and lakes used in the route map. Natural Earth, boundaries · Natural Earth, lakes

[22] Archival references for selected sites. The locations are approximate. UN archive, p. 10 · ODIN

[23] Coordinates of operating hubs. Civil Aviation Committee

[24] ADKARS, Electric Regional Aviation Route Network workbook, 2027–2041 scenario. Worksheets cover the annual plan, routes, calculations and frequencies. Road travel estimates were checked against a published route and the road development programme.

Kapan–Gyumri road route · EBRD, North–South Road Corridor project

Figures are rounded after calculation. Cost ranges reflect uncertainty about the scope of works and procurement prices. Infrastructure costs are stated in Armenian drams and airline costs in US dollars to allow the two budgets to be considered separately.