

# Cycling-Friendly Standards in Europe

## A Comparative Report on National Schemes in Sweden, Lithuania, Poland, Germany and Denmark

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## South Baltic

### 1. Executive Summary

This report analyses cycling-friendly services and schemes- understood as national or regional certification and recommendation systems for cycling-friendly service providers - along large parts of EuroVelo 10. The analysis is based on expert interviews in Poland, Germany, Denmark and Lithuania, an SME survey conducted in five regions, and insights from a European scheme-leader meeting. It is addressed to SMEs seeking orientation or entry into cycling-friendly schemes, scheme leaders and destination managers aiming to align standards with cyclists needs, and European and national actors interested in strengthening coordination and service quality along the EuroVelo network.

#### Scheme models and what makes them work in practice

The report finds that cycling-friendly schemes in Europe follow different governance, funding, and operating models, each with distinct strengths and vulnerabilities:

- **West Pomerania (Poland) – MPR Pomorze Zachodnie** operates as a publicly run recommendation system coordinated by the Marshal's Office. Participation is free of charge, with recruitment, verification, field inspections, certification and integration into regional tools carried out by an internal administrative team. Core costs relate mainly to communication materials, signage/certificates, promotional activities and events, with additional EU funds used for larger campaigns. This model enables very low entry barriers for SMEs and stable operations as long as political and budgetary support remains strong; however, it also implies high dependence on public funding and limited financial autonomy.
- **Germany – ADFC Bett+Bike** represents a mature, large-scale, fee-based certification model managed by ADFC Bett+Bike Service GmbH (a social enterprise owned by regional ADFC associations). Its operating costs are strongly linked to IT infrastructure, quality management and inspections, and ongoing communication. The scheme positions itself primarily as a quality management system, not a booking platform, and maintains stable core criteria over decades while integrating new developments (e.g., e-bikes) cautiously—often first as optional elements. The model is organisationally robust and widely recognised, but financially sensitive: it must balance rising operating costs with limited willingness of SMEs to pay higher fees and increasing expectations for marketing services.
- **Denmark – Bed+Bike Denmark** is a fee-based certification scheme aligned with the Bett+Bike concept and explicitly framed as a quality label rather than a marketing product. It operates without permanent public core funding and depends on maintaining sufficient participation for financial viability. This model supports operational independence, but it is more exposed to market fluctuations and scale constraints than publicly funded systems.
- **Lithuania** currently has no national or regional cycling-friendly scheme in place. The report describes several structural reasons discussed in interviews (e.g., limited institutional framework and weak long-term prioritisation), while also highlighting that cycling tourism activity exists in practice and that scheme absence should not automatically be equated with an absence of capable SMEs.

Across models, the report's overarching finding is that long-term scheme resilience depends on: (a) stable governance capacity, (b) realistic criteria that do not exceed SME feasibility, (c) credible verification/quality assurance processes, and (d) funding structures that can absorb cost pressures over time.

### **SME survey: what services exist along EuroVelo 10**

The SME survey suggests that many participating businesses already provide a range of cycling-relevant services addressing core cyclist needs (e.g., one night stays, bicycle parking, water access, Wi-Fi, basic information), though depth and consistency vary by region and sector. Accommodation providers—particularly hotels—tend to show the broadest and most consistent service provision, while other sectors often cluster around basic provisions. However, data coverage differs heavily by region.

### **Alignment between SME survey and schemes**

The analysis shows a generally strong alignment between existing cycling-friendly schemes and the services provided by analysed SMEs, particularly in the accommodation sector, which consistently offers the most comprehensive and specialised cycling-friendly services. Core scheme requirements largely reflect services that are already common in practice, while more advanced offers remain concentrated among a smaller group of SMEs. At the same time, the voluntary nature of the survey implies a potential selection bias towards already cycling-affine or scheme-experienced businesses, meaning that alignment should be interpreted as indicative rather than representative of all SMEs along EuroVelo 10.

### **European scheme-leader meeting: system-level lessons**

The ECF-hosted meeting highlighted significant diversity across European schemes in terms of maturity, governance structures, and sectoral scope and repeatedly identified fragmentation as a key challenge: limited interoperability, inconsistent terminology, and weak data comparability hinder coherent Europe-wide visibility. At the same time, most scheme operators expressed reservations about creating a unified European scheme, as existing labels are embedded in their own governance and financial models and often represent an important source of revenue. Instead, participants suggested that more realistic forms of alignment could include the partial harmonisation of criteria across labels and the development of a shared visual identity to improve recognisability for cyclists. Many participants also emphasised the importance of stronger knowledge exchange between schemes to address shared challenges. Across discussions, funding sustainability—particularly for schemes relying primarily on certification fees, subsidies or project-based resources—was consistently identified as the most significant structural challenge.

### **Overall conclusions**

Taken together, the report concludes that cycling-friendly schemes are most effective when they function as credible quality and structuring instruments grounded in feasible SME practice. Development potential lies less in expanding long lists of requirements and more in strengthening practical service quality, improving cross-sector coordination, and enhancing cross-border visibility along EuroVelo 10. At European level, supporting cooperation and mutual learning between schemes—while respecting national and regional contexts—emerges as a central lever for achieving more consistent cyclist experience along long-distance route

## 2. Introduction

### 2.1 Background & Context

Cycling tourism has become an increasingly important segment within the European tourism market, driven by growing environmental awareness, changing mobility patterns, and rising demand for active and health-oriented travel experiences. Small and medium-sized enterprises (SMEs) along long-distance cycling routes play a key role in shaping the overall quality and attractiveness of cycling destinations. At the same time, many SMEs face challenges in understanding and implementing cycling-friendly standards that meet the expectations of international cycling tourists while remaining economically feasible.

The Baltic Biking Upgrade (BBU) project addresses these challenges within the framework of the Interreg South Baltic Programme. BBU is a transnational cooperation project aiming to support SMEs along the southern part of EuroVelo 10, the Baltic Sea Cycle Route, in developing bicycle-friendly services, products, and offers. The project is based on the observation that while many SMEs are aware of the potential of EuroVelo 10, they often lack the knowledge, tools, and networks needed to align their offers with the route and effectively market them to international target groups.

Officially launched on 1 September 2023 and running until 2026, the project brings together nine partners from six countries. Poland, Lithuania, Sweden, Denmark, and Germany together cover more than 4,900 km of EuroVelo 10—over half of the entire 9,100 km route—while Belgium contributes expert knowledge at European level. The project focuses on the South Baltic Area, where cycling-friendly standards, services, and business networks are often unevenly implemented.

Within this context, Work Package aims to roll out bicycle-friendly services along EuroVelo 10 by transferring basic standards and practical knowledge to SMEs across partner countries. This report constitutes the final deliverable of WP2 and builds on earlier project outputs, including the report *Cycling Friendly Schemes in Europe: A Comparative Analysis*, available at <https://pro.eurovelo.com/resources>, which provided a structured overview of existing national and regional cycling-friendly certification and recommendation schemes across Europe.

### 2.2 Objectives of the Report

However, the present report goes beyond a comparison of service requirements and standards.

Its central focus lies on the economic and organisational dimensions of cycling-friendly schemes. The analysis explicitly examines how schemes are funded, governed, and operated in practice; which business models have proven to be resilient over time; and where structural weaknesses, financial risks, or unrealistic expectations have led to stagnation or failure. By analysing both well-established and emerging schemes, the report seeks to draw lessons not only from success stories but also from challenges and shortcomings.

The report combines qualitative insights from expert interviews with scheme leaders, findings from a European scheme-leader meeting, and quantitative data from a survey of SMEs along EuroVelo 10. This mixed-method approach allows for an assessment of how cycling-friendly

standards interact with real-world business conditions, including cost structures, seasonality, staffing constraints, and market pressures faced by SMEs.

By shifting the focus from criteria alone to economic feasibility and long-term sustainability, this report aims to provide practical guidance for regions, scheme operators, SMEs, and policymakers. It contributes to a deeper understanding of what makes cycling-friendly schemes work in practice, under which conditions they can be successfully transferred, and how they can support the long-term development of cycling tourism along EuroVelo 10 and in other European regions.

### 3. Methodology

#### 3.1 Data Sources

##### 3.1.1 Expert interviews

We aimed to contact as many national cycling-friendly scheme leaders as possible and conducted digital interviews whenever feasible. Depending on availability, interviews were carried out either in written form or as online meetings.

For MPR Pomorze Zachodnie, Poland, the questions were answered in written form by Stanisław Prusiewicz, Chief Specialist in the Territorial Cooperation and Tourism Department at the Marshal's Office of the West Pomeranian Voivodeship. He is a member of the Implementation Team for the *Cyclist-Friendly Places* recommendation system, appointed pursuant to Order No. 102/21 of the Marshal of the West Pomeranian Voivodeship, and is responsible for the entire recruitment process of the scheme.

For Germany, the questions were answered in written form by Stephan Durant, Managing Director of *ADFC Bett+ Bike Service GmbH*.

For Denmark, a semi-structured interview was conducted via Zoom with Paul Aspinall, Chairman of the Board of *Danish Tourism*. He has held this position for the past three years and previously served as a board member. He has been active in the tourism sector for over 15 years, primarily in tourism education as a programme manager, and has worked closely with the tourism industry in research and development contexts.

For Sweden, insights were provided by Sofie Andersson, Tourism Coordinator at Visit Dalarna, who shared practical experiences from coordinating the regional "Outdoor Qualified" scheme.

For Lithuania, an interview was conducted with Aušra Keterytė and Darina Detolli, Project Coordinators at the *Klaipėda Region Association*.

The following interview questions were used as guidelines:

#### Introduction

1. Name and position
2. How many SMEs are currently certified?

#### Funding

1. What are the major expenses of a cycling friendly scheme? Do you work on a voluntary basis (non-profit) or as a commercial business?
2. Which funding sources (e.g. public grants, membership fees, sponsorship) have proven to be the most reliable in the long term, and what challenges have you faced in securing these funds?
3. Have there been situations in the past where the scheme's funding was at risk? What measures did you take to restore financial stability?

#### Business Model

1. How have you structured participation fees or certification costs to ensure they remain affordable for SMEs without compromising the financial viability of the scheme itself?
2. How do you manage seasonal fluctuations in cycle tourism to ensure the scheme remains economically sustainable for SMEs throughout the year?
3. How did you find a balance between being attractive for as many SMEs as possible and providing extensive criteria for tourists?
4. How do you react to new developments such as E-bikes or digital tools

#### Motivation

1. What specific incentives or support measures do you offer businesses to keep participation in the scheme attractive in the long term, even when immediate economic benefits are not apparent?
2. Have you faced resistance or reluctance from businesses to join the scheme in the past? What strategies have proven successful in overcoming these objections?

#### Benefits for Region/Cycle Tourism/SMEs

1. Can you provide concrete figures or examples that demonstrate the scheme's economic benefits for the region (e.g., increase in bookings, revenue growth, new business openings)?
2. What are the most cost-effective measures a SME should take to become more cycling friendly?
3. How did you create your criteria? Did you use any particular sources regarding cycling tourists and their needs and wishes?
4. What is the feedback that you receive from SMEs and tourists regarding your scheme?

#### Conclusion

1. Are there any other challenges that your certification scheme faced, that you would like us to know about?
2. What advice would you give to new emerging schemes to operate successfully?
3. Any feedback regarding this interview?

### 3.1.2 Scheme Leader Meeting

On 18 November 2025, the European Cyclists' Federation (ECF) organised and moderated a European meeting of cycling-friendly service scheme representatives. The meeting brought together representatives of existing national and regional schemes, tourism organisations, cycling associations, and certification initiatives from several European countries.

The purpose of the meeting was to exchange information on the current landscape of cycling-friendly service schemes in Europe, including their organisational structures, scope, and operational approaches. Particular attention was given to governance and funding models, implementation challenges, and the situation in countries where no formal schemes are currently in place.

A transcript of the meeting was produced and subsequently analysed as a qualitative data source for this report. The insights gained were used to complement the expert interviews and the SME survey, particularly with regard to structural and economic aspects of cycling-friendly schemes.

### 3.1.3 Survey

To objectively assess the existing tourism businesses, a set of criteria was developed to define what constitutes a "cycling-friendly" offering. Several methods were employed to achieve this.

First, existing cycling-friendly initiatives were analysed, including Bett + Bike by the German ADFC, Velo Popas from Romania, the MPR program from Poland, and various adaptations of the Bed & Bike concept. Second, a target group analysis was conducted based on several studies on cycling tourism. Third, international SMEs that have achieved a high level of cycling friendliness were examined to potentially incorporate some of their offerings into the analysis. Finally, insights were gathered from a workshop with local cycling-friendly businesses, where common guest requests and complaints from participants were discussed. This workshop was organised by project partner Visit Lolland Falster in Denmark.

The combination of these resources resulted in a set of criteria for cycling-friendly offers, spread across five industries. These criteria were then sent to all project partners in the form of a Word document and an Excel checklist file to inventory the SMEs in their respective countries. To minimize in-person evaluations or desk research, a Microsoft Forms survey was distributed to all project partners for the SMEs to complete.

## 3.2 Limitations

The findings presented in this report are subject to several methodological limitations that should be considered when interpreting the results.

First, the SME survey was conducted with a relatively limited number of participants in several regions and sectors. Participation was voluntary and relied on the willingness and availability of SMEs, which may have resulted in a self-selection bias. Businesses with an existing interest in cycling tourism or with above-average cycling-friendly offers are likely to be overrepresented, while less engaged or resource-constrained SMEs may be underrepresented. Consequently, the survey results do not allow for statistically representative conclusions but rather provide indicative insights into current practices and development potentials.

Second, the expert interviews with scheme leaders are inherently subjective. While they offer valuable in-depth insights into governance structures, funding models, and operational challenges, the perspectives presented reflect individual experiences and institutional viewpoints. In some cases, critical aspects such as economic performance or internal challenges may be underreported or framed in a favourable manner. No systematic data on economic impacts at SME level were collected in any of the participating countries. As a result, this report does not assess concrete economic effects of cycling-friendly schemes, such as revenue or booking changes.

Third, the Scheme Leader Meeting organised by the European Cyclists' Federation served as a qualitative exchange format rather than a systematic data collection exercise. Contributions were selective and dependent on the priorities, experience, and openness of participating schemes. In addition, the schemes represented were at different stages of development, ranging from well-established certification systems to newer or smaller initiatives. Not all European cycling-friendly initiatives were represented, and discussions focused primarily on shared challenges rather than on comprehensive or standardised reporting. As a result, the insights derived from the meeting cannot be considered exhaustive or representative of all existing schemes.

Finally, differences in the maturity, scale, and institutional embedding of cycling-friendly schemes across countries limit direct comparability. National legal frameworks, tourism structures, and funding environments vary significantly and influence both scheme design and economic performance. These contextual factors must be taken into account when transferring findings or recommendations to other regions.

## 4. Country Profiles: National Cycling-Friendly Schemes

### 4.1 MPR Pomorze Zachodnie, Poland

#### Introduction:

Several regional cyclist-friendly recommendation systems exist in Poland, the most developed being in Małopolska and West Pomerania. The *Cyclist-Friendly Places (MPR)* recommendation system in the West Pomeranian Voivodeship was launched in 2022 and is coordinated by the Marshal's Office of the West Pomeranian Voivodeship. The system is managed by an internal implementation team responsible for recruitment, application verification, field inspections, evaluation reports, certification, and the integration of certified facilities into regional digital tools such as the West Pomerania cycling app.

The scheme targets facilities relevant to cycling tourism, including accommodation providers, restaurants, tourist attractions, tourist information points, and selected retail and service facilities. As of 2025, 187 facilities are part of the system, with continuous recruitment throughout the year. Some facilities hold certification in more than one category.

The MPR system operates primarily along major cycling routes in the region, including EuroVelo 10 and EuroVelo 13, and is embedded in broader regional and cross-border cycling tourism initiatives.

#### Funding:

The MPR system is fully publicly funded by the budget of the West Pomeranian Voivodeship. Participation in the scheme is free of charge for all businesses, and facilities can join or leave the system at any time without financial consequences.

All operational tasks are carried out by employees of the Marshal's Office as part of their regular employment. Field inspections are conducted within standard business travel procedures. The main costs associated with the scheme include:

- Design, printing, and distribution of brochures and cycling maps
- Promotional campaigns and press articles
- Organisation of workshops and events
- Production of certificates and MPR signage

For larger promotional activities, external EU funds are additionally used. According to our interview, funding for the scheme has never been at risk, and no project related to the MPR system has been denied funding by the regional authorities to date. This, however, depends on the political willingness of the relevant governmental institutions.

#### Business Model:

The MPR system is designed as a non-commercial, voluntary recommendation scheme with low entry barriers for SMEs. There are no participation fees, certification costs, or membership charges.

The eligibility criteria focus on basic cyclist needs and are intentionally not excessive. They are based on proven best practices- particularly experiences from the MPR system of the Małopolska Voivodeship- and were further developed through consultations with regional cycling and tourism authorities. At the same time, the criteria were adapted to the specific

conditions of the West Pomeranian Voivodeship, including its extensive cycling route network, coastal characteristics, seasonality, and the needs of cyclists travelling with luggage or families. Mandatory requirements include, for example, the provision of secure bicycle and luggage storage, basic repair tools, and the possibility of overnight accommodation for a minimum of four cyclists when vacancies exist. Facilities may voluntarily offer additional services such as e-bike charging, laundry, bicycle rental, transport services, or cyclist-oriented meals.

Applications are reviewed on a continuous, year-round basis, and most participating facilities operate throughout the year. To address seasonality, the administration regularly updates printed and digital materials, including a comprehensive MPR folder published twice a year. The folder contains contact details for all MPR facilities, recruitment rules for the recommendation system, descriptions of long-distance cycling routes, and data from bicycle counters in the region. By providing structured and regularly updated information on services and cycling infrastructure, these materials aim to encourage cycling tourism beyond the peak summer season and support travel planning in spring and autumn.

#### Motivation:

The main incentive for businesses to participate in the MPR system is free promotion through official regional tourism channels. Certified facilities are featured in printed cycling maps and brochures, on regional websites, in the West Pomerania mobile app, and in press and social media campaigns. From an SME perspective, the digital strategy of the scheme represents a particularly strong motivation, as it directly increases visibility and reach without requiring additional marketing investment. Through integration into the West Pomerania mobile app, participating businesses become easily discoverable for cyclists during trip planning and while travelling, allowing accommodation providers, restaurants, and attractions to be found along the route with only a few clicks.

Beyond promotion, the MPR system places strong emphasis on community building and knowledge exchange. Regular meetings, training sessions, and workshops support facility owners in developing their offers, better understanding cyclists' needs, and adapting to evolving tourism trends. A key example is the annual Polish-German Cycling Tourism Days, which provide opportunities for networking, showcasing services, and gaining access to current industry knowledge.

The visibility associated with the MPR plaque and certificate is perceived as valuable by businesses and has led to observable imitation effects, where additional facilities apply after seeing certified peers in their locality. Participation also provides access to networking opportunities, workshops, training sessions, and events such as the Polish-German Cycling Tourism Days.

In the long term, MPR participation can provide advantages such as priority access to promotional initiatives, tourism fairs, and additional points in selected regional calls for proposals. The system has not encountered resistance from businesses, which is attributed to the voluntary nature of participation and the realistic design of the criteria.

#### Benefits for the region, cycling tourism and SMEs:

While no direct data on economic outcomes such as revenue growth or booking increases at SME level is collected, feedback from inspections and conversations with business owners

indicates that participation in the MPR system improves visibility, credibility, and differentiation from competitors. Facility owners report positive experiences with the promotional support and personal contact with the scheme's implementation team.

The scheme also contributes to regional cooperation, international exchange, and knowledge transfer, particularly through Interreg projects and collaboration with more established systems in Germany and Denmark.

#### Recommendations:

For emerging schemes, it is suggested to adopt a publicly supported, low-threshold recommendation model that prioritises feasibility and broad SME participation. Simple and realistic core criteria, combined with voluntary and free participation, help avoid early resistance from businesses and support steady growth. Regular verification based on dialogue rather than enforcement contributes to trust-building and long-term engagement. Close cooperation between cycling, tourism, and promotion authorities supports a balanced integration of infrastructure-related requirements and visibility, while continuous adaptation to regional conditions strengthens acceptance and resilience.

From an SME perspective, the findings underline that becoming more cycling-friendly often requires only limited and feasible measures. For accommodation providers, secure and easily accessible bicycle storage, basic repair equipment, washing and drying facilities, and cyclist-oriented breakfast options can significantly increase guest satisfaction without major investment. Gastronomy businesses can enhance their attractiveness for cyclists through visible bicycle parking, access to drinking water, quick and nutritious meal options, and simple amenities such as route maps, shaded rest areas, or e-bike charging possibilities. Across sectors, clearly communicating the cycling-friendly character of a business—through signage, scheme labels, visual elements, or dedicated website information—helps cyclists recognise suitable services already at the planning stage. In addition, SMEs are encouraged to explore EU and national funding programmes supporting sustainable tourism, which can facilitate incremental investments in infrastructure and further strengthen their positioning within cycling tourism.

#### Conclusion:

The Cyclist-Friendly Places recommendation system in the West Pomeranian Voivodeship operates smoothly and continues to expand. No major operational or financial challenges have been reported since its introduction in 2022.

Key elements identified as critical to the scheme's functioning include simple and realistic criteria, strong public promotion, regular verification combined with dialogue rather than enforcement, and adaptation to regional conditions. The system is described as a continuously evolving process that benefits from international exchange and ongoing feedback from businesses and cyclists.

## 4.2 Bett+Bike Germany

### Introduction:

The *ADFC Bett+Bike* certification scheme is the national cycling-friendly accommodation standard in Germany and has been in operation for over 30 years. It is managed by *ADFC*

*Bett+ Bike Service GmbH*, a social enterprise owned entirely by regional ADFC associations. Profits generated by the company are reinvested into the non-profit activities of the ADFC.

The scheme currently certifies approximately 5,800 accommodation providers across Germany, Denmark, Luxemburg, Belgium, Austria and Italy, making it one of the largest and most established cycling-friendly certification systems in Europe. Its core objective is to ensure reliable service quality for cycling tourists by defining and monitoring standards that reflect the fundamental needs of cycle travellers.

#### Funding:

The Bett+Bike scheme operates as an economically independent organisation structured as a social enterprise of the ADFC, with all shareholders being ADFC regional associations. Profits generated by the organisation are reinvested into the non-profit objectives of the ADFC. The scheme is primarily funded through certification fees paid by participating accommodation providers. Key cost drivers include:

- IT infrastructure (database, registration portal, website)
- Communication materials and advertising
- Quality inspections and quality management
- Central and decentralised staff responsible for certification, support, and administration

As a commercial entity, the scheme depends on continuous customer acquisition and marketing activities. Rising operational costs in recent years have necessitated moderate increases in the yearly certification fees. At the same time, accommodation providers are described as being under strong financial and competitive pressure, which limits the extent to which fees can be raised.

#### Business Model:

The Bett+Bike business model is described as a balancing act with narrow profit margins. Fee increases are implemented cautiously and only to compensate for general cost increases.

The scheme explicitly positions itself as a quality management system, not as a booking platform or a pure marketing product. While participating businesses increasingly demand marketing services, the organisation emphasises maintaining its core function: improving service quality for cycling tourists.

The criteria catalogue is a central element of the scheme. Around 85% of the original basic criteria have remained unchanged since the scheme's early years, as they continue to reflect the core needs of cycle travellers. New developments, such as e-bike charging infrastructure, are initially introduced as optional additional criteria. Whether such elements should become mandatory minimum criteria is considered carefully, taking into account feasibility and the potential loss of participating businesses.

In terms of digitalisation, the scheme has introduced:

- A host portal enabling accommodation providers to apply for certification online at any time
- An improved map-based search for cyclists, including smart filtering options

### Motivation:

Motivation for participating businesses is supported through a combination of knowledge transfer, personal support, and associated marketing services.

Key elements include:

- Newsletters and direct communication with personal contact persons
- On-site consultation during certification and recertification visits
- Information on market developments in cycling tourism (e.g. e-bikes)
- Opportunities for advertising via the scheme's website and social media

During our interview, it was highlighted that convincing highly sceptical businesses can be counterproductive. Businesses primarily seeking booking mediation or extensive marketing often show higher cancellation rates if they are brought into the scheme. However, the combination of bundled marketing exposure (e.g. cycling guides, regional cycling portals, apps, third-party platforms) and the option of annual cancellation are described as the strongest arguments for hesitant providers.

### Benefits for the region, cycling tourism and SMEs:

The scheme does not collect concrete statistics on economic outcomes such as revenue growth or booking increases. However, it is observed that certified businesses tend to achieve higher customer satisfaction, reflected in online guest reviews.

Our interview Partner indicates that there is a correlation between:

- Tourism success of regions
- Higher overall "trust scores" derived from online guest ratings
- The presence of quality-oriented tourism infrastructure, including certified cycling-friendly accommodation

It is suggested that regions characterised by quality tourism (indicated by online reviews) are more resilient against downward price competition and may better counteract structural challenges such as the decline of traditional accommodation businesses. There was also noted a "snowball effect": regions with existing certified businesses are easier to expand than areas with no prior Bett+Bike presence.

Feedback from cyclists includes appreciation for making cycle travel easier, alongside requests for lower prices and better information accessibility. Businesses express appreciation for knowledge transfer but also criticise the scheme for offering fewer marketing services than they might expect.

### Recommendations:

For emerging schemes, it is suggested to carefully balance financial independence with credibility and quality assurance. Fee-based models can support operational autonomy but require sufficient scale and a clear value proposition for SMEs. Maintaining a strong focus on verifiable service quality, rather than expanding primarily as a marketing label, helps build trust among businesses and cyclists. Openness to cooperation and exchange with other national

and international schemes is recommended to strengthen coherence and visibility along cross-border routes such as EuroVelo.

For SMEs, it is suggested to initially focus on meeting the established basic criteria of the Bett+Bike system, which reflect long-standing core needs of cycle travellers. Efficient first measures include secure bicycle storage, basic repair facilities, cyclist-oriented information, and flexibility for short, one-night stays. Scheme participation itself represents an important entry step, as it provides structured guidance and practical feedback during verification processes. Continuous engagement with available knowledge-transfer formats supports adaptation to developments such as e-bike use.

#### Conclusion:

The Bett+Bike scheme emphasises the importance of long-term strategic planning, with a strong focus on quality management, clear processes, and robust IT and data structures. Marketing is regarded as important but secondary to maintaining the credibility and integrity of the certification system.

Based on over three decades of experience, it is suggested that emerging schemes carefully consider cooperation with established organisations such as ADFC Bett+Bike, which already operate internationally and possess extensive expertise in managing cycling-friendly certification systems across different countries and tourism contexts.

### 4.3 Bed+Bike Denmark

#### Introduction:

The Danish cycling-friendly accommodation scheme is operated by Aktiv Danmark and is closely aligned with the long-established Bett+Bike concept. It operates as an industry-based, non-profit quality scheme embedded in Danish tourism structures. The scheme certifies around 80 accommodation providers that cater specifically to cycling tourists and aims to ensure a consistent and recognisable service standard for cyclists across Denmark.

The Bed+Bike Denmark scheme is financed through certification fees paid by participating accommodation providers. No permanent public core funding is used to operate the scheme.

The certification revenues are used to cover:

- Administrative and coordination tasks
- Certification and quality assurance activities
- Communication and marketing related to the scheme

The financial viability of the scheme depends on maintaining a sufficient number of certified partners and on continuous recruitment in a competitive tourism market.

#### Business Model:

The label is operated by a non-profit organisation and follows a fee-based certification model without permanent public core funding. Accommodation providers voluntarily apply for certification and pay a fee in return for inclusion in the scheme and associated visibility.

The criteria catalogue focuses on essential cyclist needs, such as secure bicycle storage and cyclist-oriented services. The requirements are designed to remain feasible for smaller providers and to prioritise practical implementation. Similarly to German Bett und Bike, the scheme is clearly positioned as a quality label, not as a booking or sales platform.

At the same time, the Danish system benefits from alignment with the established Bett+Bike concept while adapting it to Danish tourism structures and market conditions.

#### Motivation:

Participation is primarily motivated by the desire of accommodation providers to:

- Increase visibility among cycling tourists
- Be associated with a recognised cycling-friendly quality label
- Be included in relevant tourism and cycling-related communication channels
- Take part in personal dialogue, webinars, and knowledge-sharing activities (e.g. in cooperation with VisitDenmark)

The scheme is particularly attractive to businesses that aim to position themselves clearly within the cycling tourism segment, rather than to those primarily seeking direct booking mediation or extensive marketing services.

#### Benefits for the region, cycling tourism and SMEs:

No concrete statistical data on economic outcomes such as booking increases or revenue effects are collected within the scheme. The benefits identified relate mainly to structural and orientation effects, including:

- Improved recognisability of cycling-friendly accommodation for travellers
- Easier orientation and planning for cycling tourists
- Contribution to a coherent and reliable national cycling tourism offer

By providing a clear and trustworthy accommodation standard, the scheme supports Denmark's overall positioning as a cycling-friendly destination.

#### Recommendations:

For emerging schemes, our interview partner suggested to clearly position the system as a quality management framework rather than a marketing product. A stable catalogue of basic criteria reflecting fundamental cyclist needs supports long-term credibility and operational continuity. New developments, such as e-bike infrastructure or digital tools, should initially be introduced as optional elements and only gradually considered for mandatory inclusion, taking SME feasibility into account. Early investment in IT infrastructure, data management, and transparent processes is recommended to ensure scalability and organisational robustness.'

For SMEs, it is suggested to begin with clearly verifiable quality-related measures that demonstrate genuine cycling-friendliness. In the Danish context, secure bicycle storage and reliable cyclist information are prioritised as efficient initial steps. The provision of e-bike charging is identified as a relevant optional measure to address changing demand profiles. Clear communication of cycling-friendly services and alignment with a quality-focused scheme

approach are emphasised, while extensive marketing expectations are not considered a prerequisite at the entry stage.

#### Conclusion:

Bed+Bike Denmark operates on a fee-based certification model but remains limited in scale and financial sustainability. Despite more than 14 years of operation, participation has declined from an early peak of nearly 200 certified businesses to around 80 members today. No destination management organisation (DMO) currently provides structural support to the scheme. With 80 members paying around 400 EUR per year, the total revenues impose constraints to the development of the scheme. This highlights structural limitations in the scheme's current funding model and its constrained capacity for growth and professionalisation.

### 4.4 Outdoor Qualified, Visit Dalarna, Sweden

#### Introduction

The "Outdoor Qualified" scheme is coordinated by Visit Dalarna, a municipally owned tourism organisation. The initiative focuses on qualifying tourism businesses – mainly accommodation facilities located near MTB and leisure cycling trails – to meet basic standards for hosting cycling tourists. As of 2025, 15 SMEs are certified within the scheme.

The scheme was launched in 2022 is embedded in the regional tourism strategy of Dalarna and is positioned as a low-threshold quality framework rather than a comprehensive national certification system. The main target group at present is leisure cyclists, with a particular focus on mountain biking tourism.

#### Funding

The Outdoor Qualified scheme does not involve major structural or infrastructural costs. According to Visit Dalarna, expenses mainly relate to:

- Personnel time for coordination, certification, and communication
- Production of signage and diplomas
- Occasional use of external services (e.g. graphic design)

Visit Dalarna operates as a municipal company, meaning core funding is secured through the municipalities of the Dalarna region. Additional activities are financed through:

- Participation fees paid by certified facilities
- Project funding for specific development actions

No situations of financial instability have been reported for the scheme so far. The combination of public base funding and SME contributions is perceived as stable and sufficient for the current scale of the initiative.

#### Business Model

Participation costs are structured in a way that remains affordable for SMEs:

- A one-time diploma fee, scaled according to the size of the facility (e.g. campsite vs. hotel)
- A low annual fee, equal for all participants
- Optional additional costs for participation in marketing campaigns

The criteria catalogue focuses on hospitality-oriented and service-based measures rather than on major investments. Typical requirements include:

- Secure bicycle storage
- Possibility to wash bikes
- Offering packed lunches
- Basic hosting standards for cyclists

Seasonality is addressed through year-round destination marketing by Visit Dalarna. Participating facilities are encouraged to diversify their target groups and travel reasons across seasons, positioning cycling tourism as one of several complementary offers rather than as a purely seasonal niche.

Regarding new developments, e-bikes are recognised as an emerging trend. While e-bike rental is increasingly available in the region, demand is still perceived as moderate by local stakeholders. Digitalisation is viewed very positively, and digital trail maps for quality-assured routes are being introduced to address both user expectations and previous feedback.

### Motivation

Visit Dalarna supports participating SMEs primarily through capacity-building and visibility measures, including:

- Knowledge seminars on hosting, digitalisation, sustainability, and tourism trends
- Study visits and peer-learning formats
- Opportunities to join regional and international marketing campaigns
- Participation in fairs and promotional activities

No major resistance from SMEs has been observed. Most businesses show curiosity rather than reluctance. Some facilities adopt a “wait and see” attitude, particularly those who do not yet perceive cycling tourism as a strong revenue driver.

The scheme is currently under further development, as its original focus on accommodation near MTB trails is considered too narrow. Broadening the scope towards general leisure cycling is seen as an important next step.

### Benefits for the Region, Cycle Tourism and SMEs

No systematic economic monitoring exists at SME level, as cycling tourists are not coded separately in accommodation statistics. Nevertheless, qualitative feedback suggests:

- Larger facilities experience increased bookings related to bike rentals and Bikepass sales

- The scheme contributes to clearer positioning of Dalarna as an outdoor and cycling destination
- Orientation and service quality for cycling tourists have improved

From an SME perspective, the most cost-effective measures identified include:

- Staff knowledge about trails, rentals, and cycling services
- Secure bike storage
- Clear communication of cycling-friendly services (website, reception, in-room information)

The criteria were developed primarily based on regional experience, complemented by international benchmarking (e.g. Bikers Welcome in Scotland). Feedback from cyclists indicates strong demand for digital maps, which is currently being addressed through the introduction of new digital tools.

### Conclusion

A key structural challenge identified by Visit Dalarna is the fragmented landscape of cycling-related labels and initiatives in Sweden. While national platforms such as *Sweden by Bike* exist, the coexistence of multiple regional concepts and systems is perceived as potentially confusing for visitors and inefficient in terms of branding and recognition. For emerging schemes, the main recommendation is to start with a simple concept and test it in practice rather than aiming for a fully developed certification system from the outset.

The Outdoor Qualified scheme illustrates how a low-threshold, publicly anchored model can support SMEs in gradually becoming more cycling-friendly without imposing significant financial or organisational burdens.

### 4.5 Lithuania

At present, cycling in Lithuania is currently in a transition phase. While bicycle-friendly certification schemes are not yet in place, cycling is gradually moving from a leisure-oriented activity towards a more functional and tourism-related mode of mobility, particularly at local and regional levels. Several interrelated structural, political, and cultural factors explain this situation.

First, cycling is not perceived as a relevant mode of transport in everyday life. Bicycles are predominantly viewed as a leisure activity, mainly used in summer and rarely for commuting to work or school. Many residents do not own a bicycle at all or borrow one occasionally instead of investing in their own. As a result, there is no strong local demand for cycling-oriented services or standards. At the same time, awareness of cycling as a sustainable and practical transport option is slowly increasing, supported by growing public discussion on health, climate, and alternative mobility

Second, cycling infrastructure is fragmented and insufficient. There are isolated cycling paths, parks, and leisure areas, but no continuous, safe bicycle networks connecting cities or regions. Dedicated cycling lanes across entire urban areas are largely missing. Secure and convenient bicycle parking is rare, and existing facilities often consist only of basic wheel racks that do

not protect bicycles from theft or damage. Cycling infrastructure development is largely driven by municipalities and regions. While national networks are still lacking, several cities and coastal regions have begun investing in cycling paths, repair stations, and tourism-oriented routes. Yet the overall lack of infrastructure discourages regular bicycle use and limits the practical relevance of cycling-friendly standards.

Third, political prioritisation of cycling is weak. Cycling is not regarded as a necessity by policymakers, particularly when compared to car traffic, public transport, or other social priorities. The political environment is described as unstable, with frequent changes in leadership and shifting agendas. As a result, long-term infrastructure planning is difficult, and sustained investment in cycling-related measures is rare. Funding constraints further limit the feasibility of launching and maintaining a formal scheme.

Fourth, there is no critical mass of cycling-oriented SMEs that would benefit from or support a nationwide scheme. Hotels, restaurants, and other tourism-related businesses generally do not adapt their services to cyclists, as demand is perceived as too low. Where cycling tourists do exist, services are often provided informally or ad hoc, without standardisation. Without a sufficient number of motivated SMEs, a certification scheme would lack both relevance and sustainability. Nevertheless, a small but motivated group of SMEs is emerging, especially in tourism, hospitality, and local services. These actors could serve as pilot participants for testing lighter and voluntary cycling-friendly approaches.

Fifth, cycling tourism exists but is not structurally supported. Organised cycling tourists visit Lithuania mainly in summer, often renting bicycles as part of guided group tours. However, this demand has not translated into permanent infrastructure, standardised services, or policy support. The absence of repair stations, safe parking, and clear guidance further limits the development of a cycling-friendly ecosystem. Seasonality is a key structural factor in Lithuania and should be taken into account when designing cycling-friendly measures. Seasonal pilots and tourism-focused solutions may therefore be more suitable than permanent, year-round schemes at this stage.

Overall, a self-reinforcing cycle emerges: limited cycling culture leads to limited infrastructure and political interest, which in turn prevents the development of cycling-friendly services and schemes. Without a broader shift in perception, infrastructure investment, and political commitment, the conditions necessary for establishing a cycling-friendly SME scheme in Lithuania are currently not in place. While the current conditions do not yet support a comprehensive cycling-friendly SME certification scheme, Lithuania could benefit from preparatory and incremental measures. Flexible guidelines, voluntary labels, or pilot initiatives could help build the necessary cycling culture, infrastructure, and business engagement over time.

## 5. Comparative Analysis of National Schemes

### 5.1 Comparison of Scheme Structures

#### Governance and Institutional Setup

- MPR Pomorze Zachodnie (Poland): Publicly operated recommendation system coordinated by the Marshal's Office of the West Pomeranian Voivodeship. All operational tasks are carried out by an internal

administrative team, ensuring strong institutional anchoring within regional government structures.

- **Bett+Bike Germany:**  
Operated by ADFC Bett+Bike Service GmbH, a social enterprise fully owned by regional ADFC associations. Although organised as a commercial entity, profits are reinvested into the non-profit activities of the ADFC, creating a hybrid governance model.
- **Bed+Bike Denmark:**  
National certification scheme operated by Bed+Bike Denmark. The scheme is market-oriented and aligned with the Bett+Bike concept but operates without permanent public core funding.
- **Lithuania:**  
No cycling-friendly certification or recommendation scheme currently exists; therefore, no governance structure is in place.

#### Funding Model and Financial Structure

- **MPR Pomorze Zachodnie:**  
Fully publicly funded through the regional budget. Participation is free for SMEs, and no financial risks or funding interruptions have been reported since the scheme's launch.
- **Bett+Bike Germany:**  
Primarily financed through certification fees paid by participating accommodation providers. The scheme operates with narrow profit margins and must balance rising operational costs with limited willingness of SMEs to pay higher fees.
- **Bed+Bike Denmark:**  
Financed exclusively through certification fees. Financial viability depends on maintaining a sufficient number of certified businesses in a competitive market.
- **Lithuania:**  
No funding model exists due to the absence of a scheme.

#### Business Model and Scheme Positioning

- **MPR Pomorze Zachodnie:**  
Non-commercial, voluntary recommendation scheme with low entry barriers. The focus is on basic cyclist needs and regional promotion rather than revenue generation.
- **Bett+Bike Germany:**  
Positioned primarily as a quality management system rather than a marketing or booking platform. The scheme prioritises long-term service quality and credibility over short-term marketing benefits.
- **Bed+Bike Denmark:**  
Fee-based certification model focusing on accommodation providers. The scheme

functions as a quality label and explicitly avoids positioning itself as a booking or sales platform.

- Lithuania:  
No business model in place.

#### Access and Attractiveness for SMEs

- MPR Pomorze Zachodnie:  
Highly accessible for SMEs due to the absence of fees, realistic criteria, and voluntary participation. Continuous recruitment supports steady growth.
- Bett+Bike Germany:  
Accessible primarily to accommodation providers willing to invest in certification fees and quality improvements. Annual cancellation options lower entry risks for hesitant businesses.
- Bed+Bike Denmark:  
Accessible to SMEs seeking clear positioning in cycling tourism, though participation requires financial commitment through certification fees.
- Lithuania:  
Lack of demand and infrastructure currently limits SME engagement in cycling-friendly services.

#### Criteria and Quality Approach

A comparison of the categories used by different cycling-friendly standard schemes is provided in the previous report *Cycling Friendly Schemes in Europe: A Comparative Analysis*, available at <https://pro.eurovelo.com/resources>

- MPR Pomorze Zachodnie:  
Focus on basic cyclist needs with intentionally limited mandatory requirements. Additional services remain optional.
- Bett+Bike Germany:  
Stable core criteria with gradual, cautious integration of new elements such as e-bike infrastructure.
- Bed+Bike Denmark:  
Clear, manageable criteria closely aligned with essential cyclist needs and adapted to national conditions.
- Lithuania:  
No formal criteria exist.

#### Benefits and Observed Effects

- MPR Pomorze Zachodnie:  
Increased visibility and credibility for participating businesses; strong regional promotion; rising cyclist counts at regional level.
- Bett+Bike Germany:  
Higher customer satisfaction and perceived quality orientation; contribution to regional tourism resilience and network effects.
- Bed+Bike Denmark:  
Improved recognizability and orientation for cyclists; contribution to a coherent national cycling tourism offer.
- Lithuania:  
Structural conditions currently prevent measurable benefits from cycling-friendly schemes.

#### Development Stage and Stability

- MPR Pomorze Zachodnie:  
Young but stable and expanding scheme with no reported operational or financial challenges.
- Bett+Bike Germany:  
Highly mature and stable system with over 30 years of operational experience.
- Bed+Bike Denmark:  
Established national scheme with a stable organizational structure but constrained in scale and financial sustainability due to dependence on continuous market participation.

## 5.2 Strengths & Challenges per Country

### MPR Pomorze Zachodnie

#### Strengths

- Strong institutional anchoring within regional government ensures stable funding and administrative capacity.
- Free participation and low entry barriers increase accessibility for SMEs and support continuous recruitment.
- Realistic and basic criteria are well aligned with SME capacities and cyclist core needs.
- Strong regional promotion through official tourism channels enhances visibility and credibility.
- Integration into broader regional and cross-border cycling tourism initiatives.

#### Challenges

- Full dependence on public funding limits financial autonomy and scalability.
- No systematic collection of SME-level economic impact data (e.g. revenue or bookings).
- Recommendation-based approach may limit perceived exclusivity compared to fee-based certification schemes.

## Bett+Bike Germany

### Strengths

- Long-standing, highly established scheme with strong brand recognition and credibility.
- Clear positioning as a quality management system ensures consistent service standards.
- Stable core criteria provide reliability and trust for cyclists.
- Robust organisational structure with dedicated staff and advanced digital infrastructure.
- Network effects and regional clustering support expansion and long-term resilience.

### Challenges

- Financial model operates with narrow margins and is sensitive to rising operational costs.
- Certification fees may deter smaller or financially constrained accommodation providers.
- Increasing demand for marketing services creates tension with the scheme's quality-focused positioning.
- Limited availability of concrete economic performance data at SME level.

## Bed+Bike Denmark

### Strengths

- Clear and focused certification model aligned with essential cyclist needs.
- Strong fit with Denmark's cycling culture.
- Market-based funding model supports operational independence.
- Adaptation of an established international concept enhances credibility.

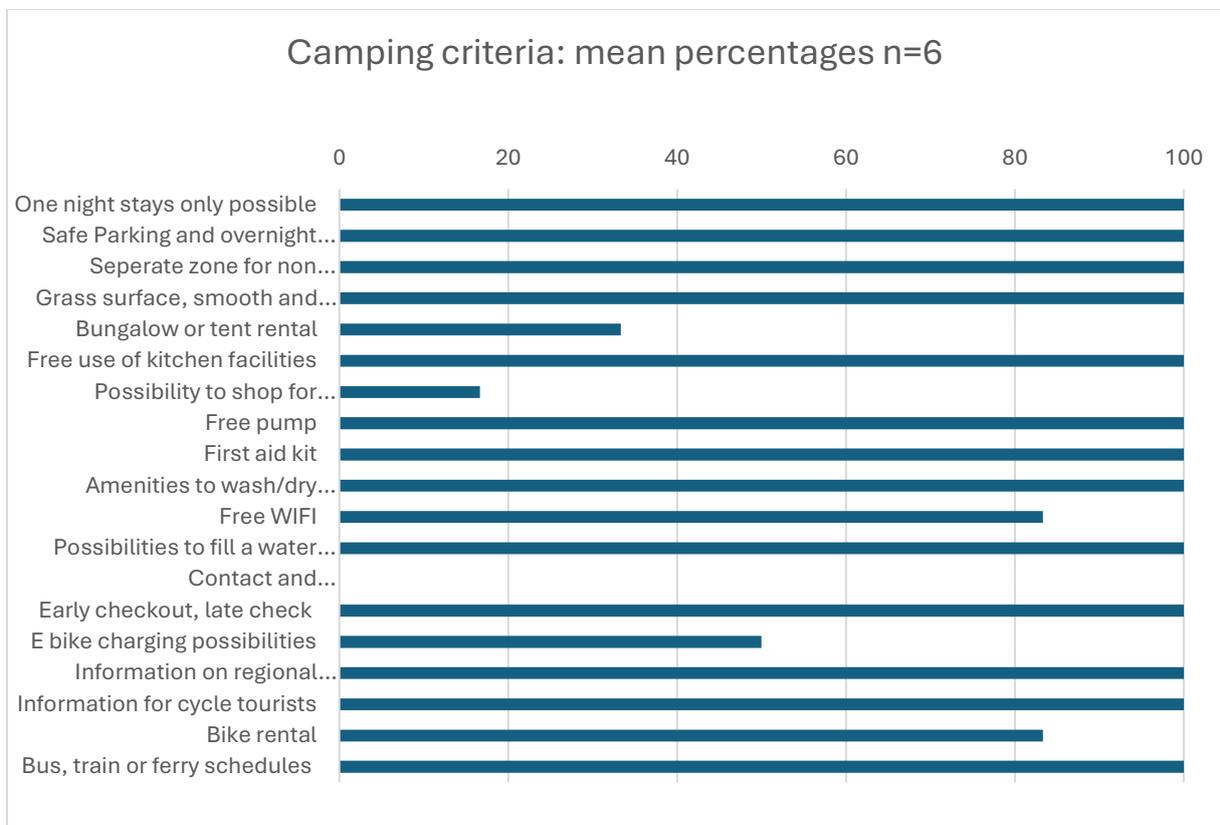
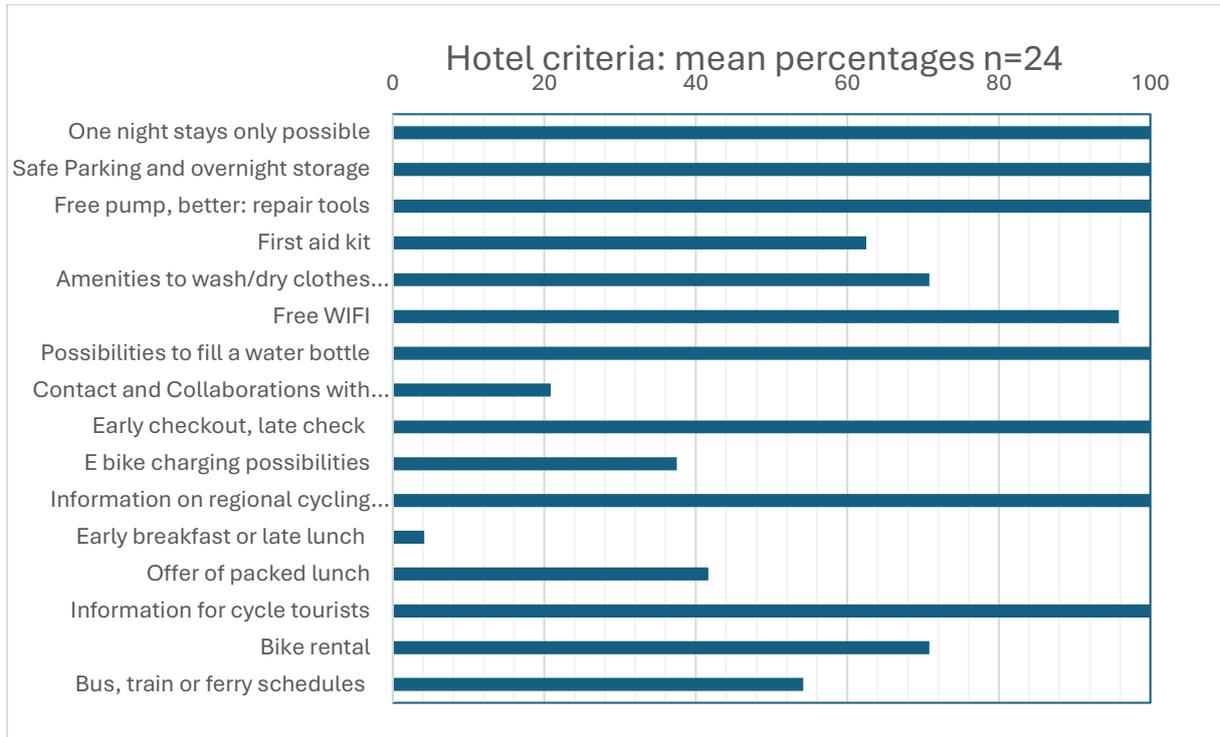
### Challenges

- Low number of certified accommodation providers limits the scheme's visibility, network effects, and overall market reach in a highly fragmented accommodation landscape.
- Strong seasonality of SME operations, which affects continuity of participation, verification processes, and year-round visibility of the scheme.
- Dependence on certification fees increases vulnerability to market fluctuations.
- Absence of public core funding limits financial buffers and expansion capacity.
- Benefits for SMEs are primarily structural and reputational, with limited measurable economic evidence.
- Competition with multiple parallel certification schemes, particularly sustainability-related labels, which compete for SME attention, time, and financial resources.

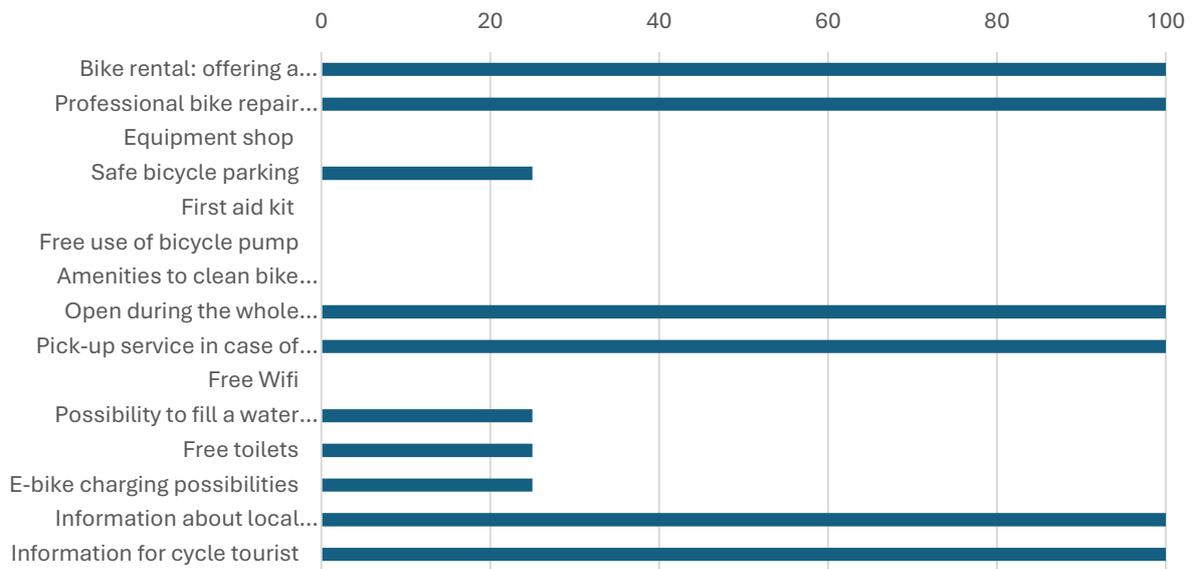
- Restricted scope focusing mainly on accommodation providers.

## 6. Results of the Company Survey

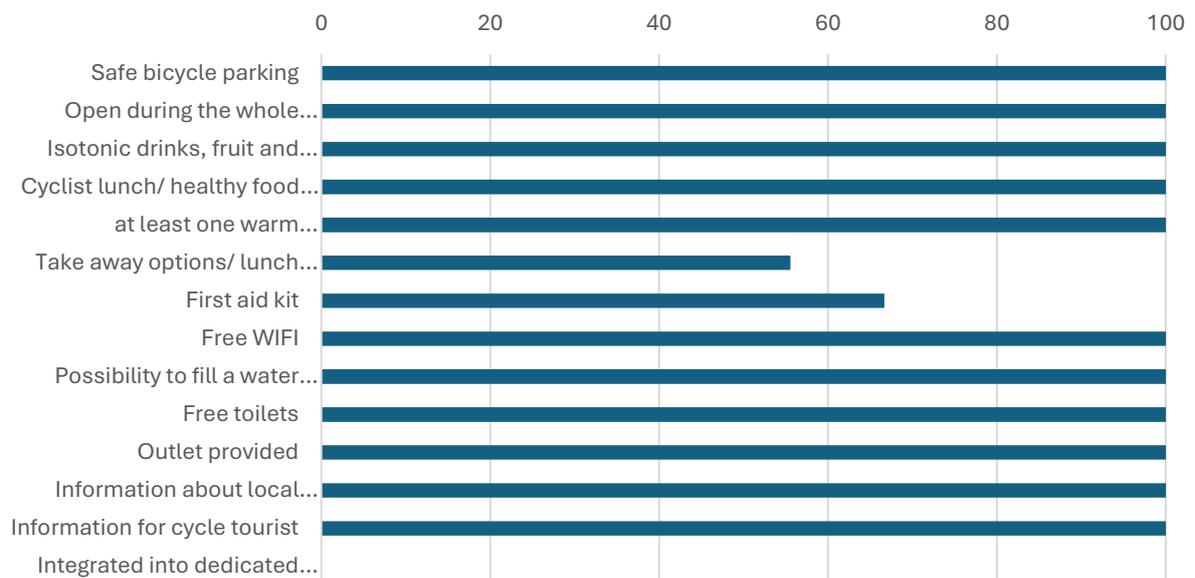
### 6.1 West Pomerania



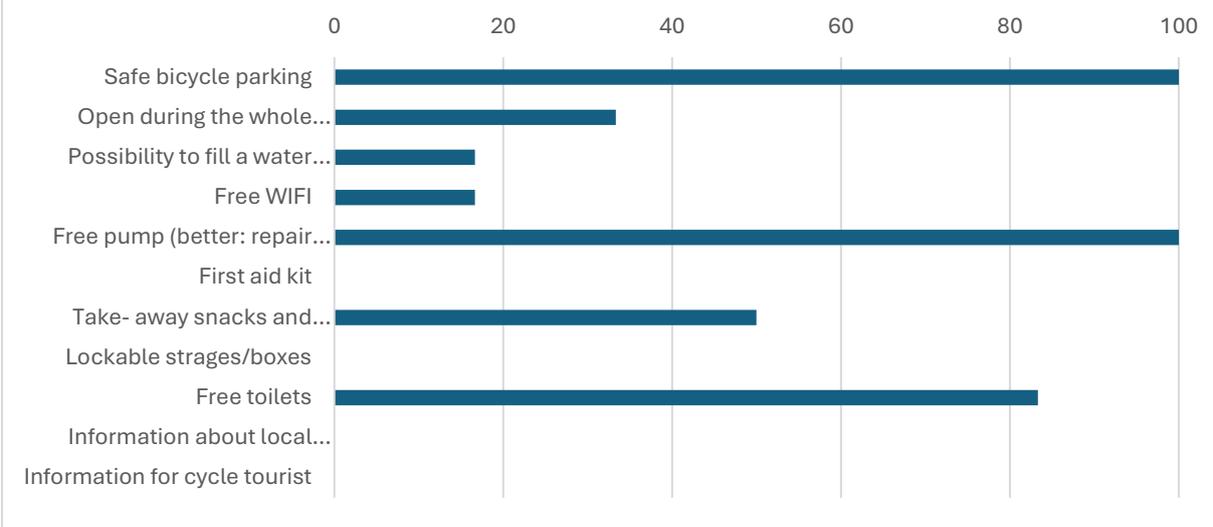
### Bike Service criteria: mean percentages N=4



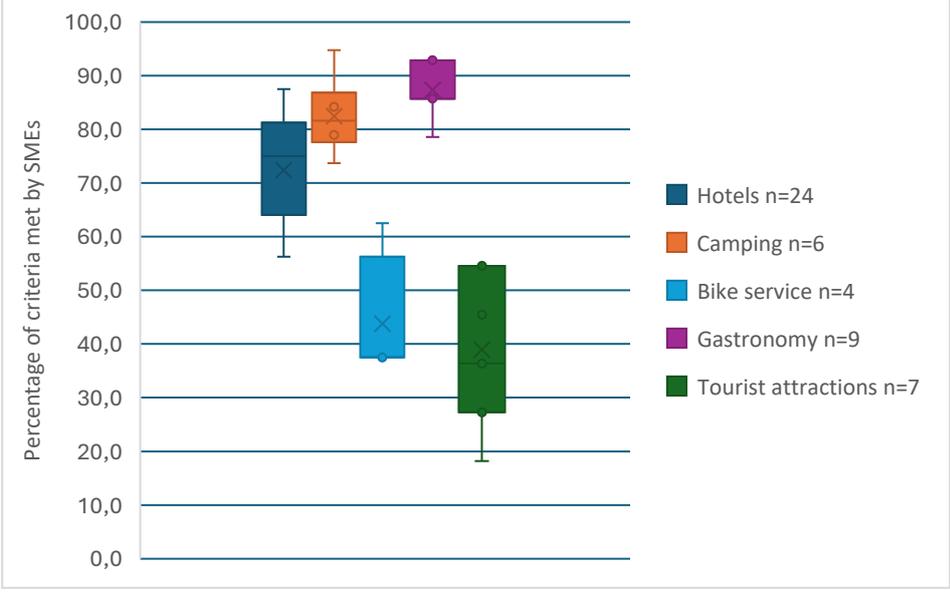
### Gastronomy criteria: mean percentages n=9



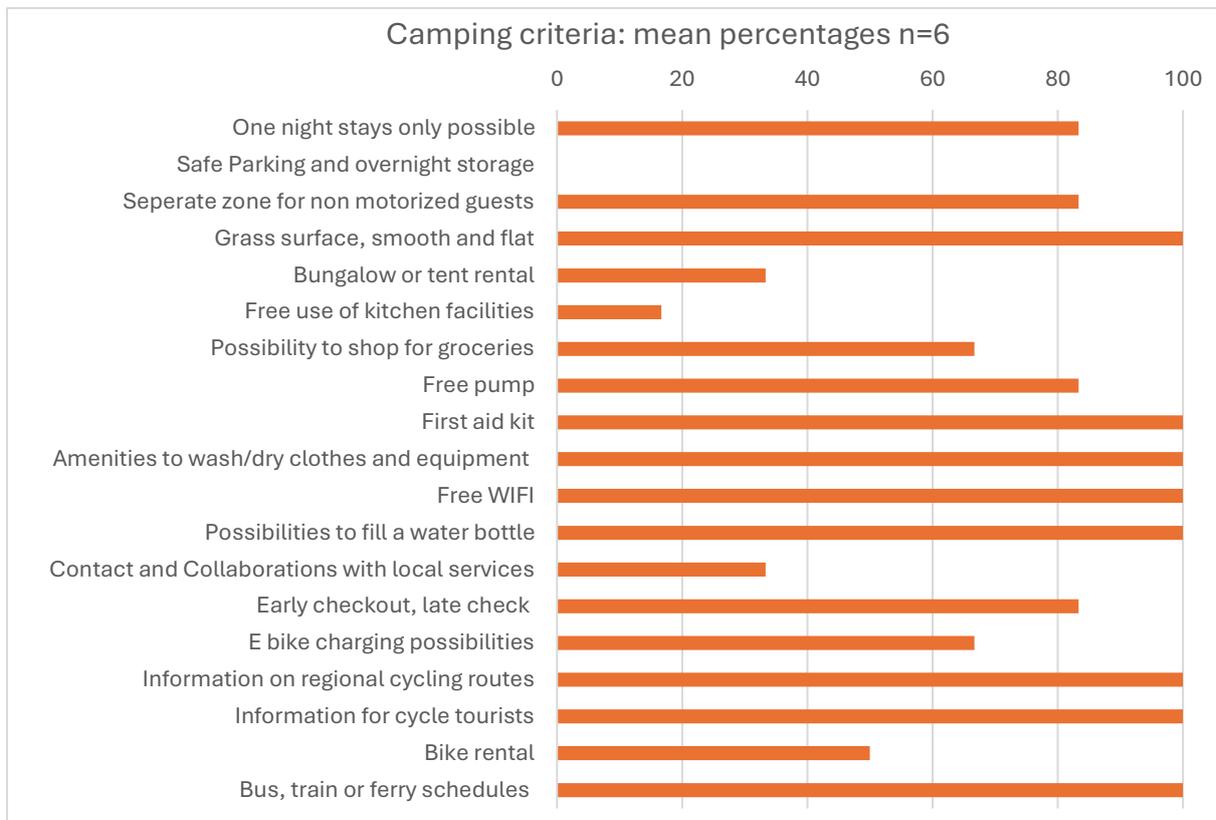
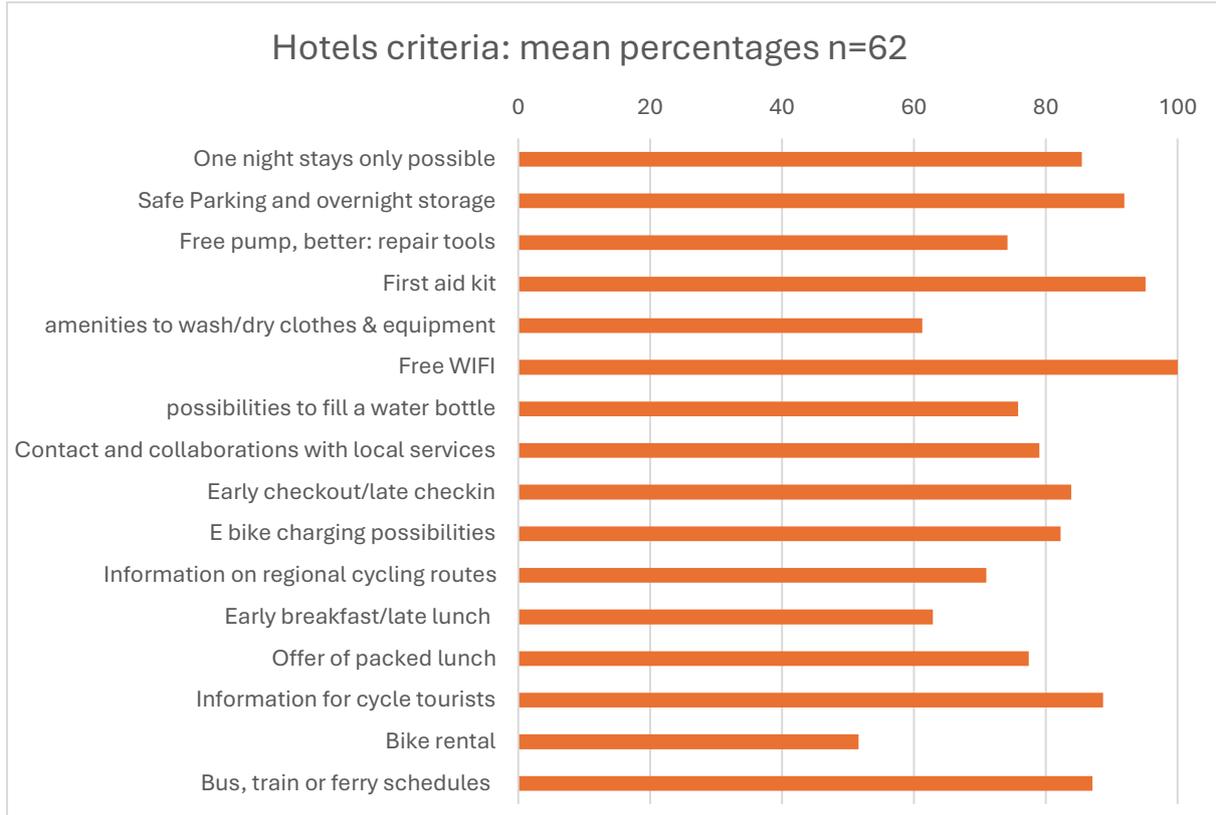
### Tourist attraction criteria: mean percentages n=7

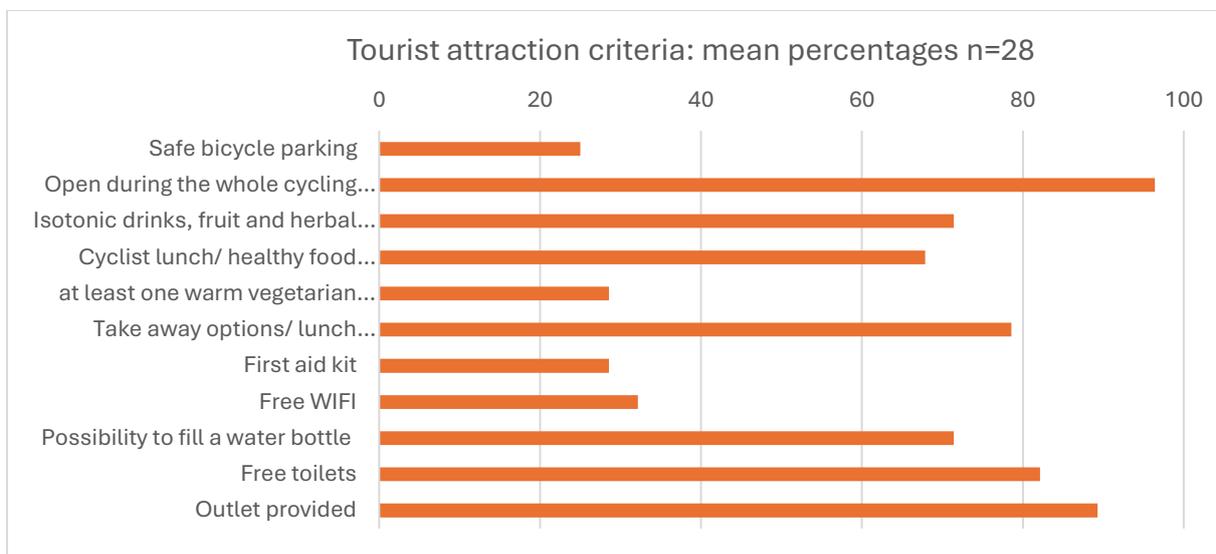
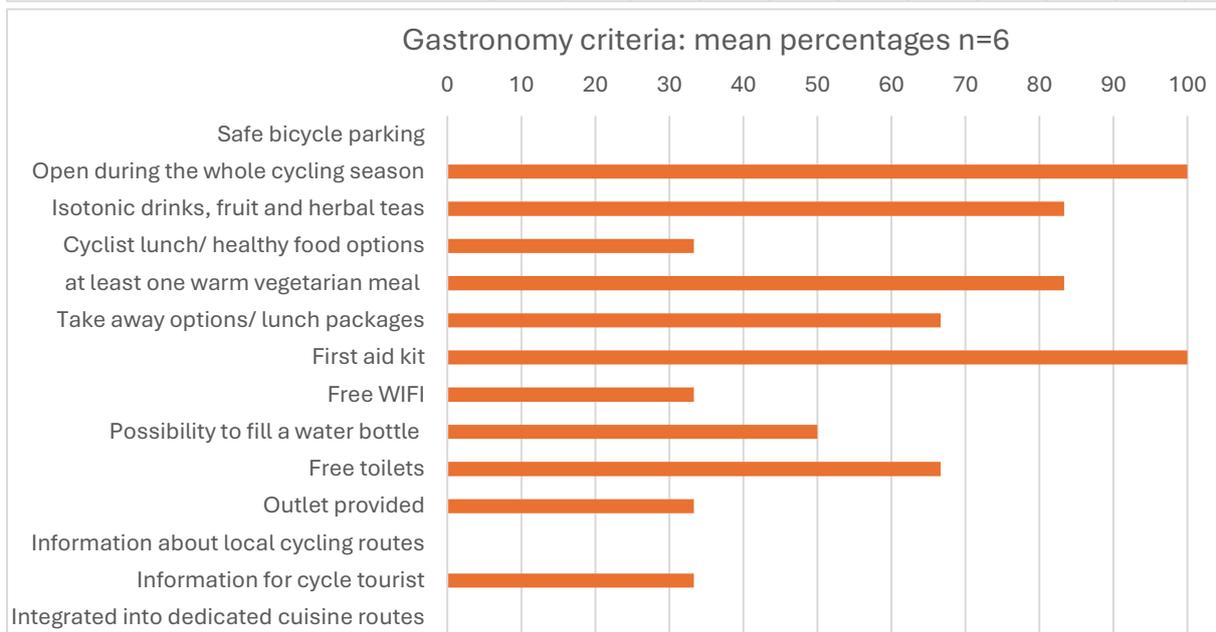
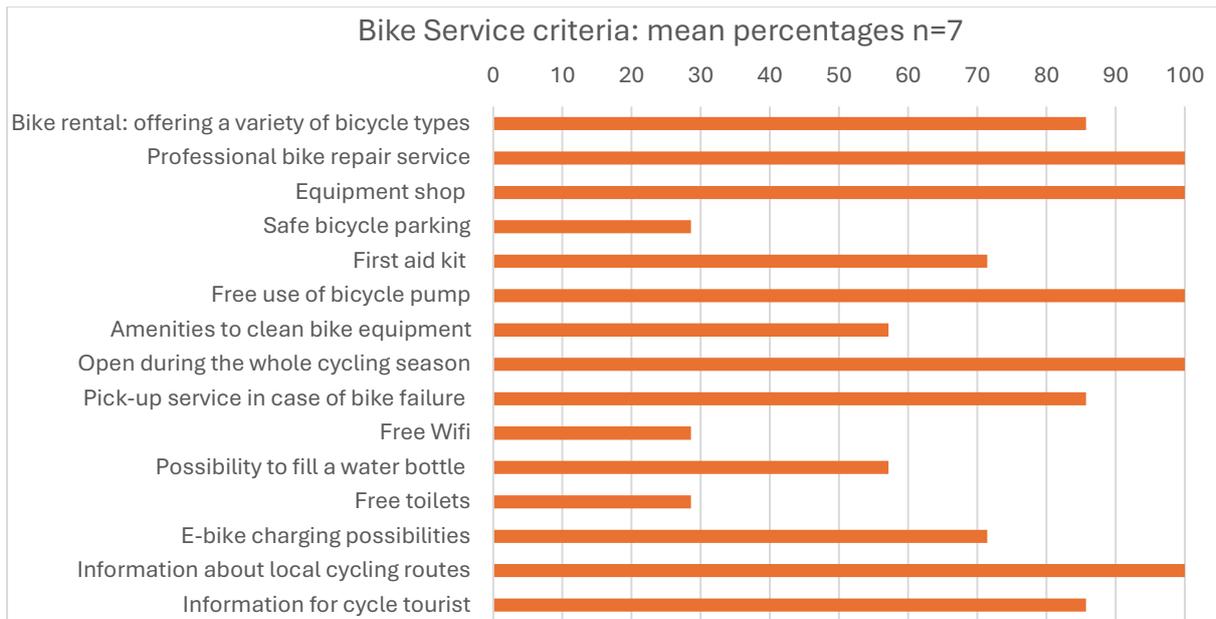


### Overall Scores of SMEs

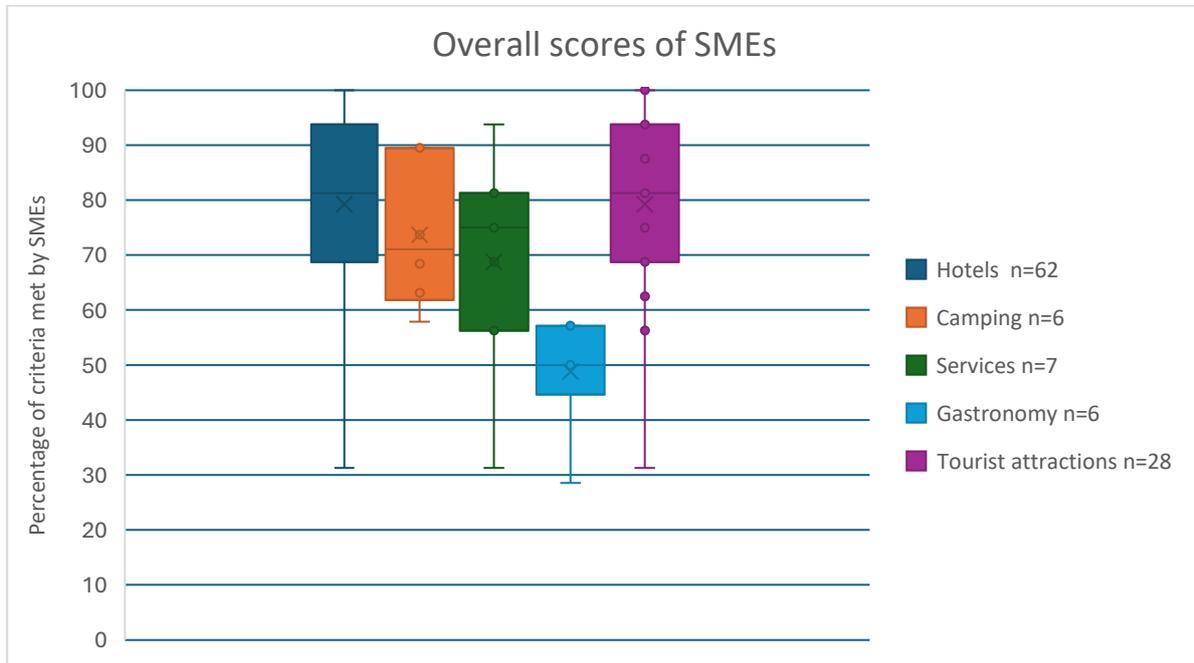


## 6.2 Germany

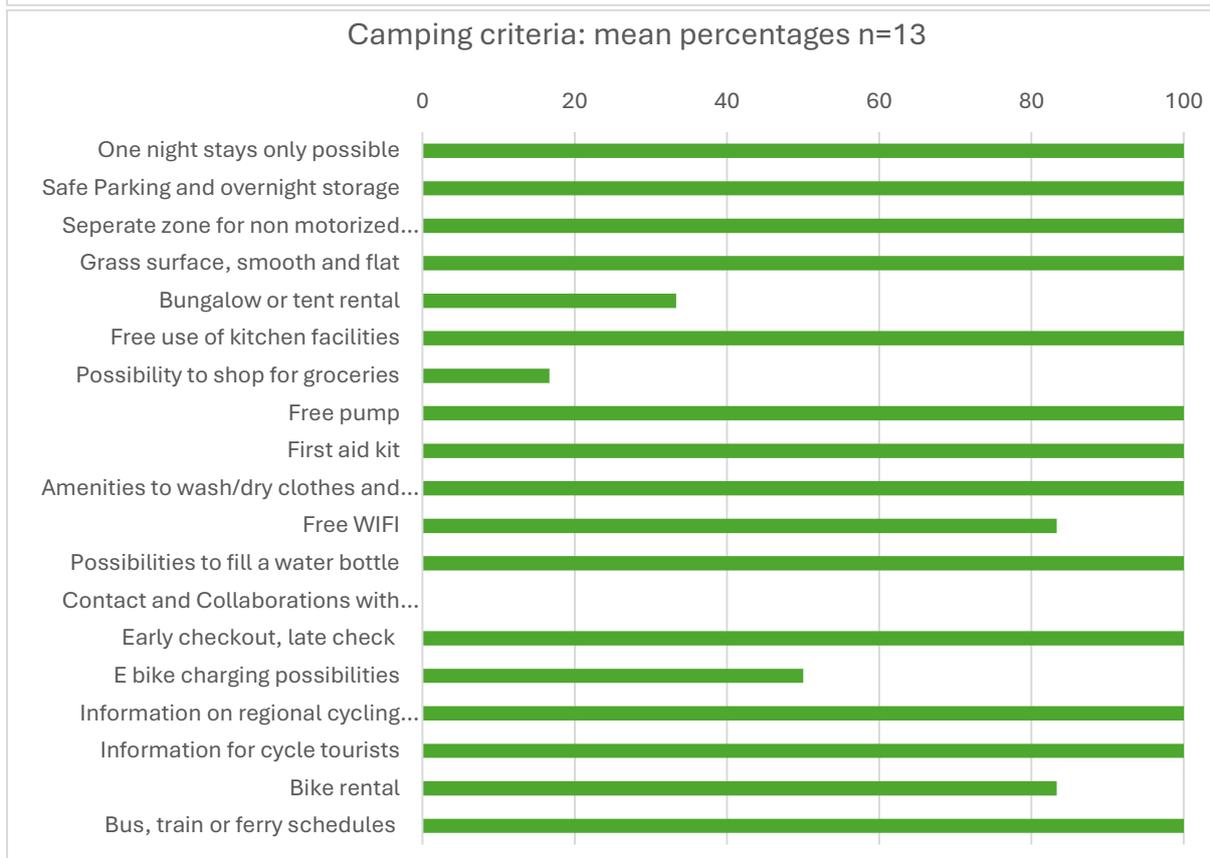
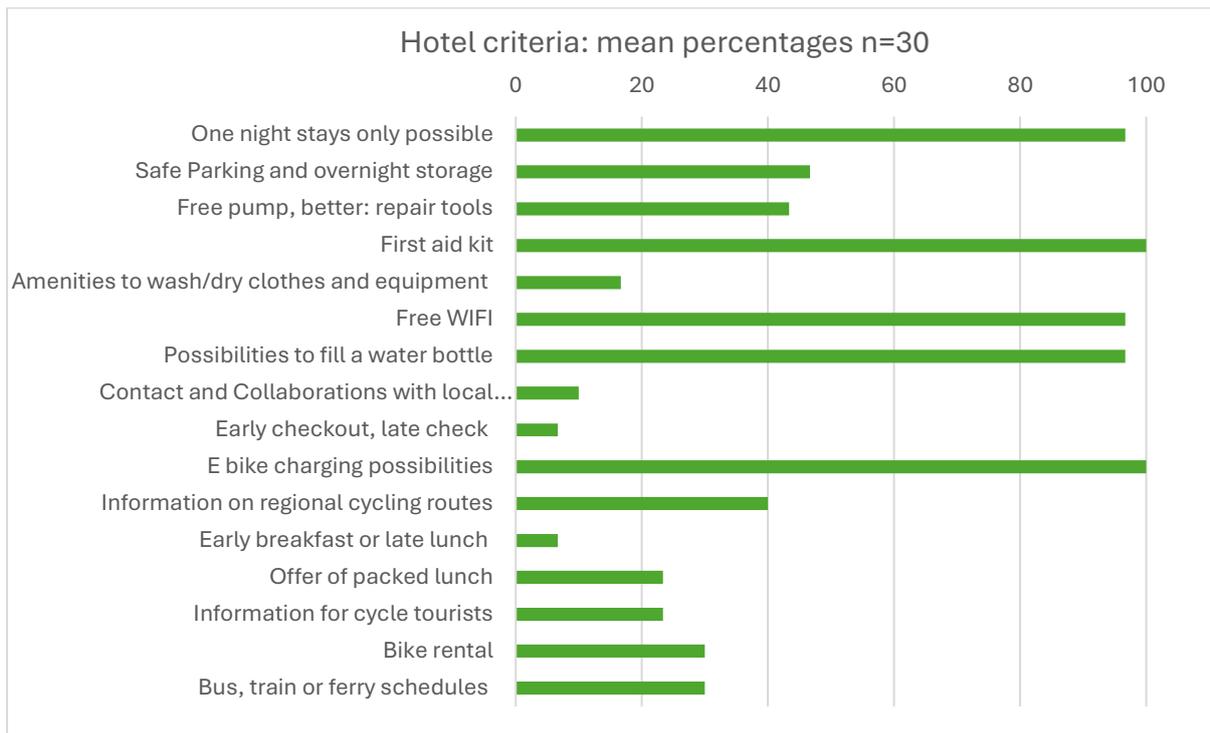


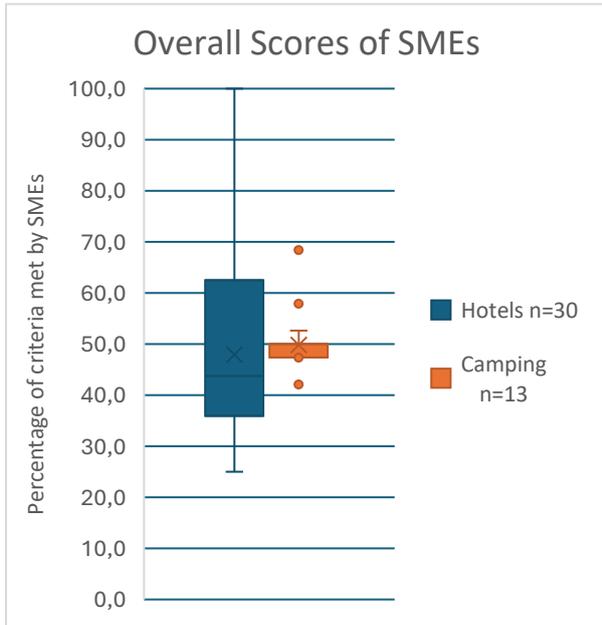


Some SMEs mentioned ideas for special cycling friendly offers which they might implement in the future or have already implemented, such as healthy cyclist breakfast, luggage transport, bicycle cleaning station and collaborations with transport businesses for hotels, as well as e bike charging possibilities and bike rentals for gastronomy and tourist attractions.



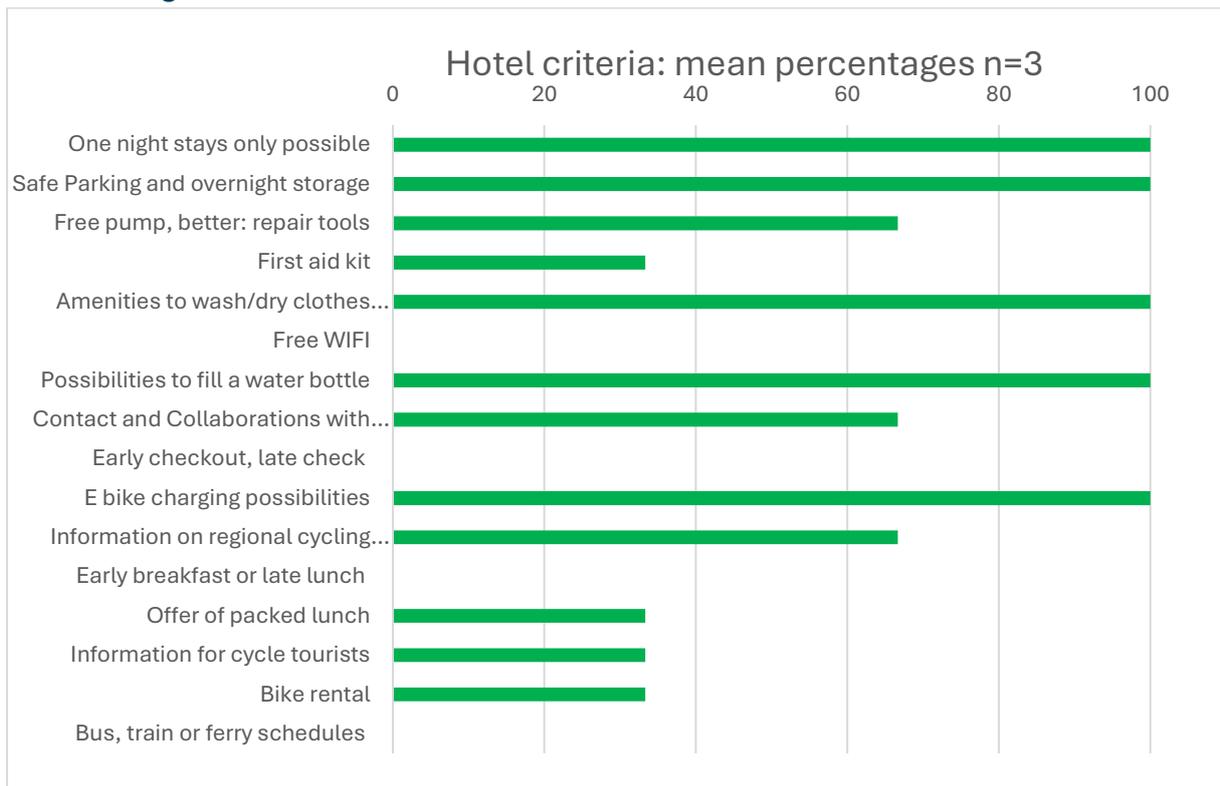
### 6.3 Lolland Falster



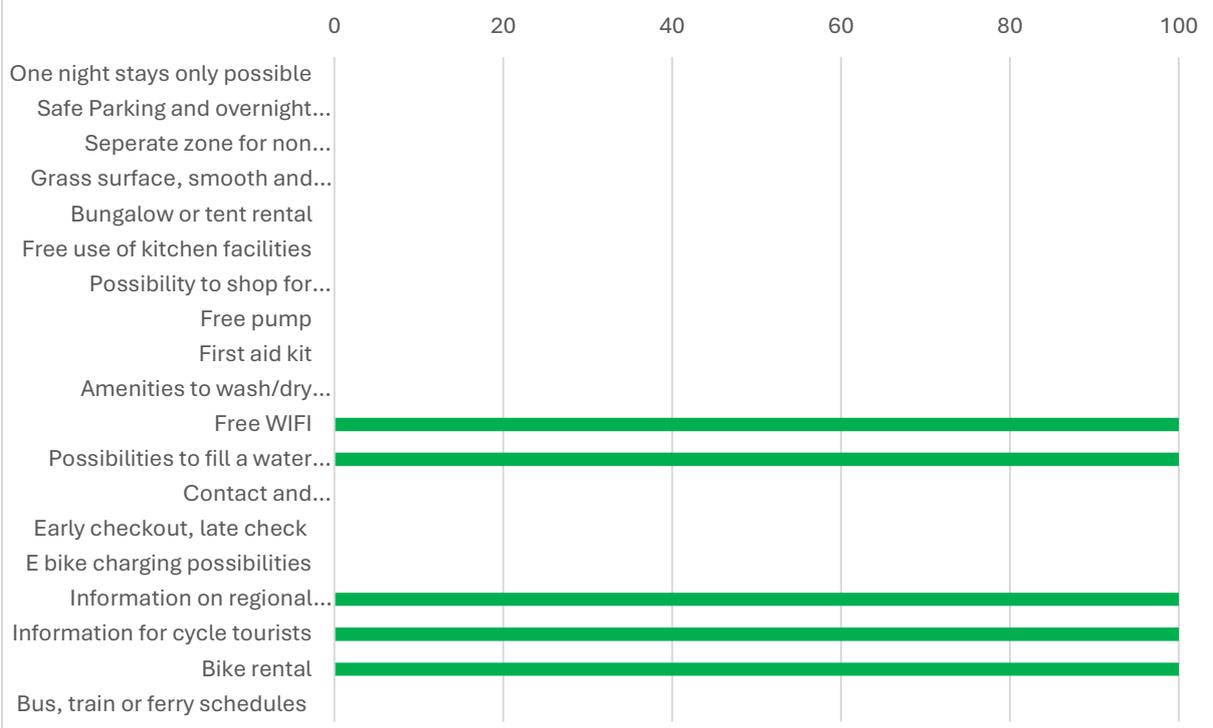


In Denmark, only data from hotels and camping was provided.

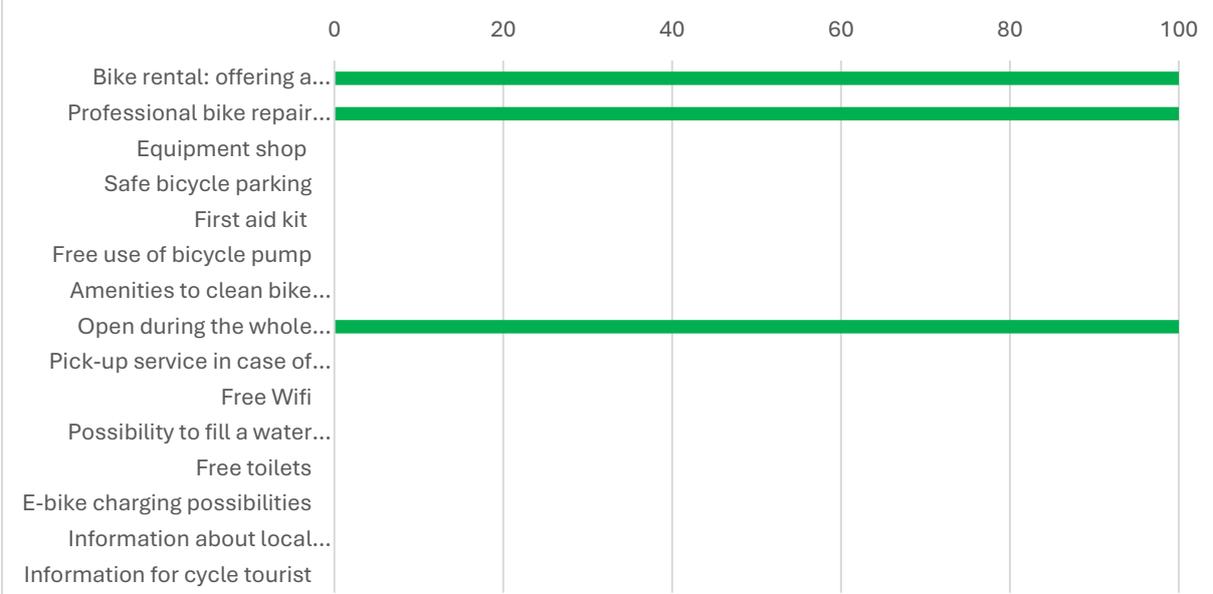
## 6.4 Blekinge, Sweden

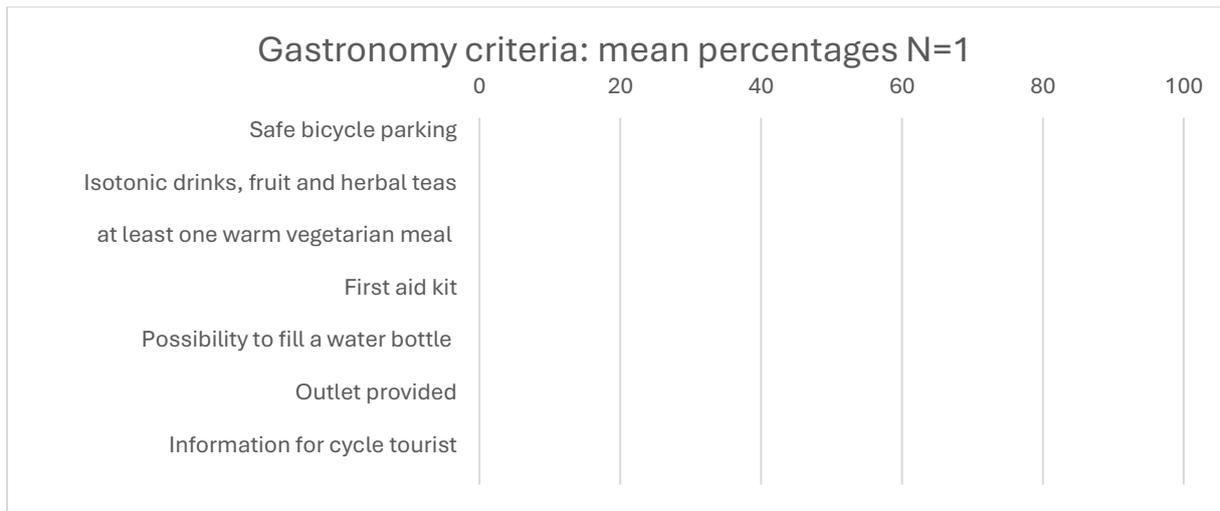


### Camping criteria: mean percentages n=3

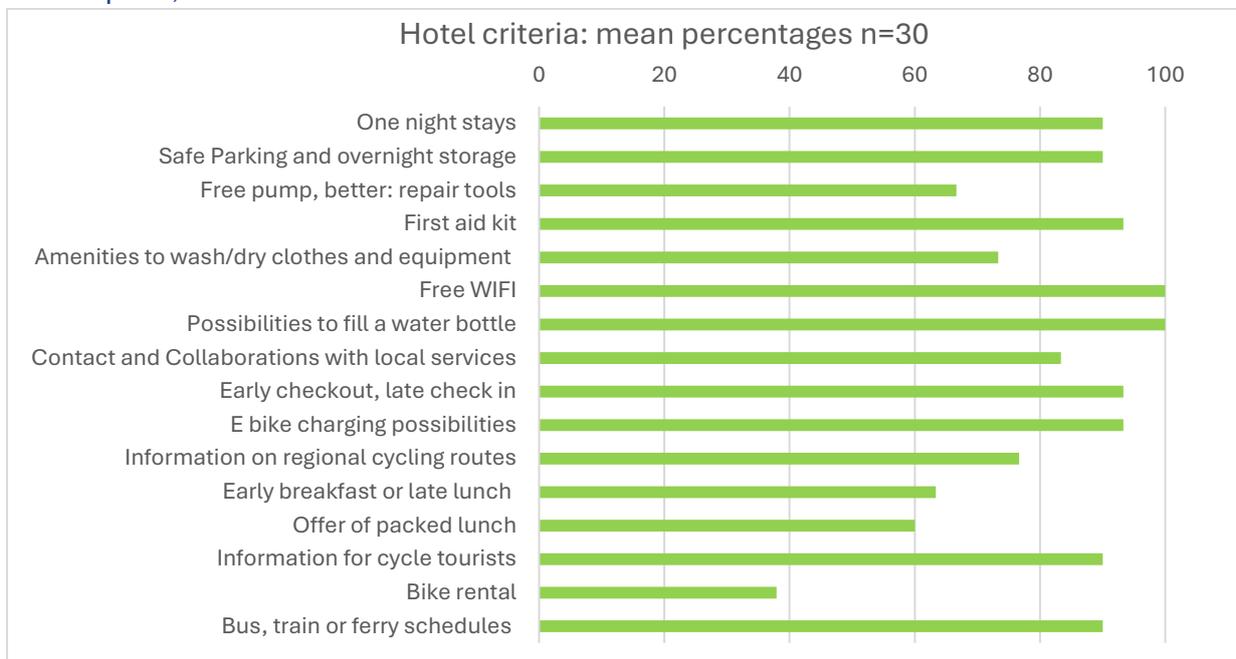


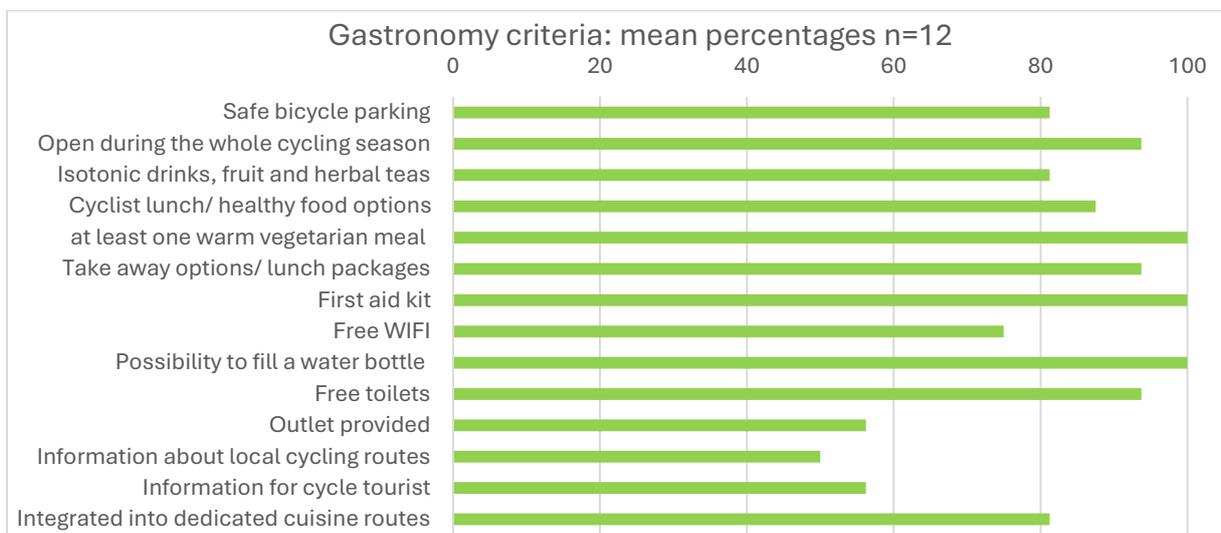
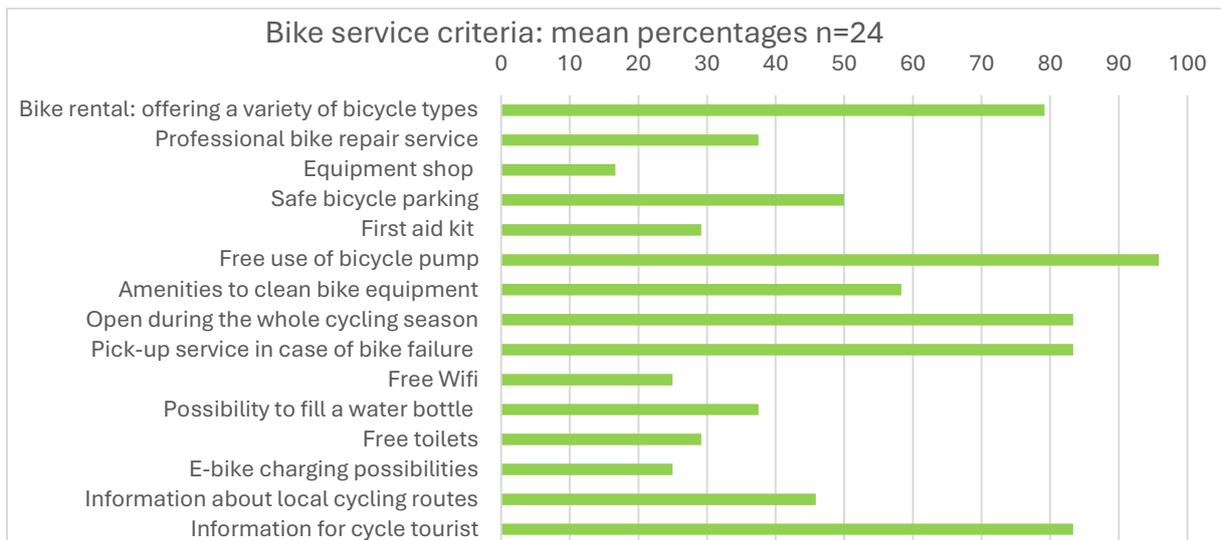
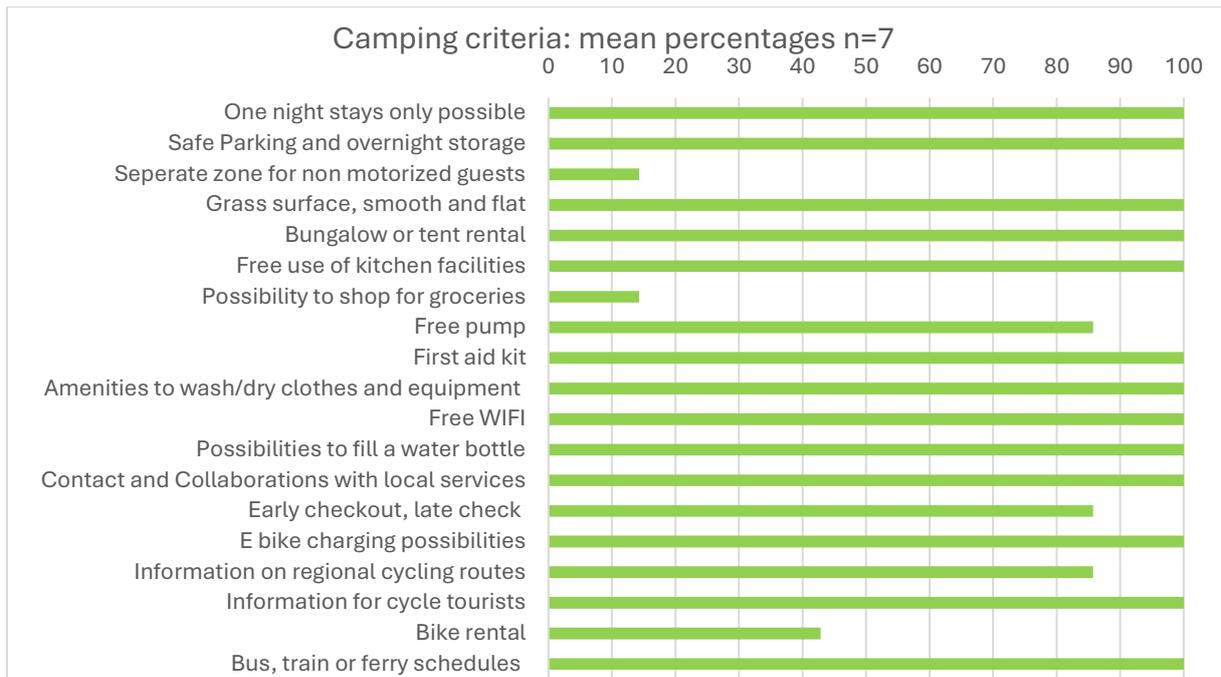
### Bike service criteria: mean percentages n=1

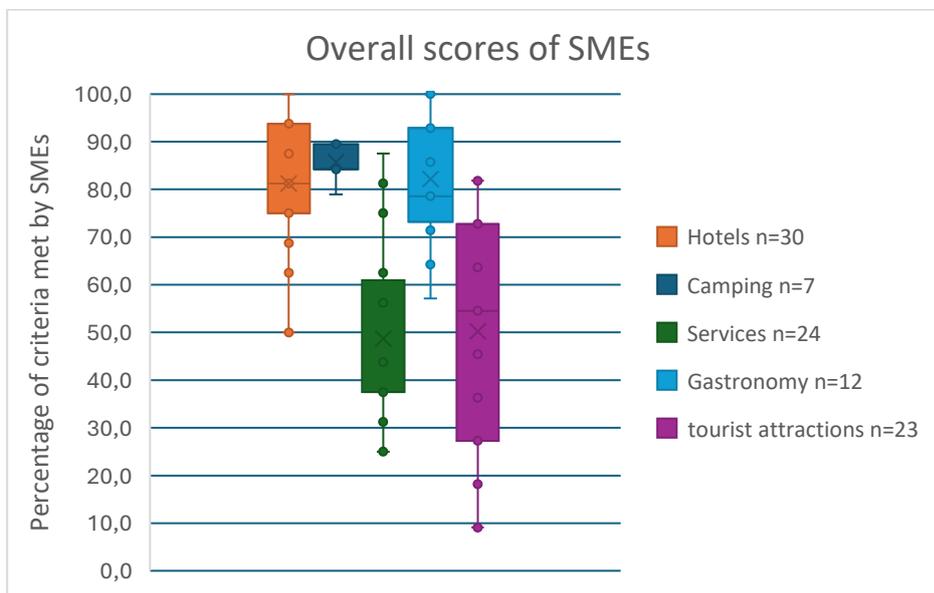
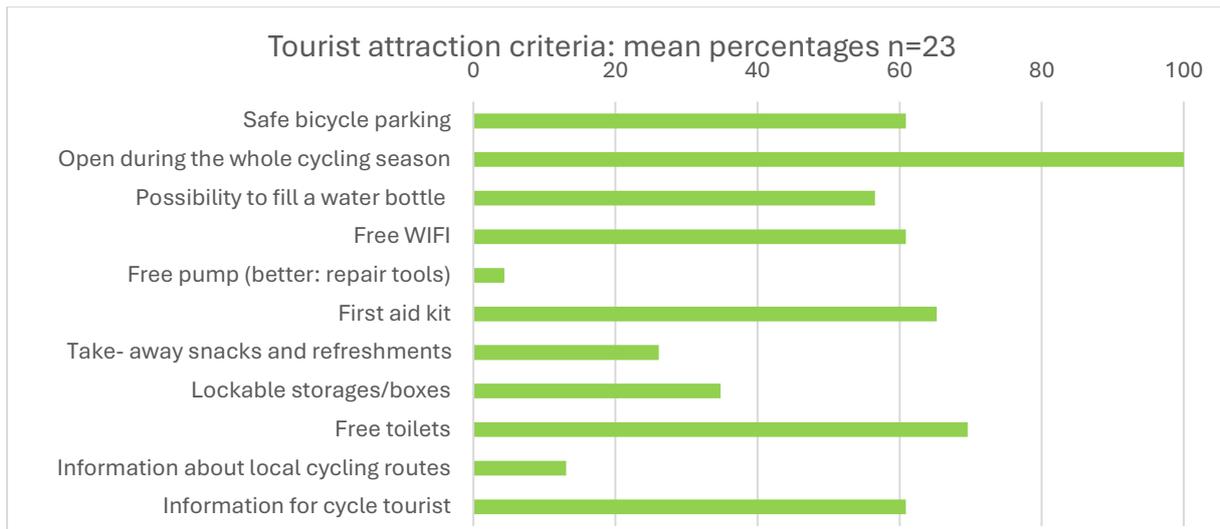




## 6.5 Klaipeda, Lithuania







## 6.6 Alignment with National Schemes

This chapter examines the alignment between existing cycling-friendly schemes and current SME practices along EuroVelo 10. It addresses four guiding questions: whether existing schemes adequately reflect the services already provided by SMEs, how large the gap is between current practice and scheme entry requirements, to what extent schemes correspond to sector-specific operational realities, and where schemes can realistically contribute to raising standards. Together, these questions provide a framework for assessing both the accessibility and the developmental role of cycling-friendly schemes in different regional contexts.

### 6.6.1 Poland – MPR Pomorze Zachodnie

The SME survey results from West Pomerania indicate a high degree of alignment between the existing service level of businesses along EuroVelo 10 and the requirements of the Cyclist-

Friendly Places (MPR) recommendation scheme. Across the surveyed criteria, many of the elements defined as mandatory or core within the MPR system show high levels of implementation among SMEs. In particular, the graphics demonstrate that basic cyclist-related services such as safe bicycle parking, access to drinking water, free Wi-Fi, first aid kits, and general information for cycling tourists are widely available. This corresponds closely with the scheme interview, which emphasizes that MPR criteria were deliberately designed to reflect realistic minimum standards already present in the region.

At the same time, the graphics show consistently lower implementation rates for more advanced or additional criteria that go beyond the MPR minimum requirements. These include, for example, e-bike charging possibilities, early or late meal options, packed lunch offers, cooperation with local service providers, and extended cyclist-specific infrastructure. Such services are explicitly defined as optional within the MPR framework and are not required for participation. The observed distribution of survey results therefore directly reflects the internal structure of the scheme, which differentiates between mandatory basic services and voluntary additional offers.

The gap between current SME practice and entry into the MPR scheme can thus be considered low. The majority of surveyed SMEs already meet a substantial share of the criteria that form the basis of the recommendation system. This finding is consistent with the interview statement that participation is intended to be accessible and that no significant resistance from businesses has been observed. The absence of participation fees and the voluntary nature of the scheme further reduce barriers to entry, which is reflected in the relatively high coverage of core criteria across the surveyed businesses.

Regarding development potential, the results suggest that realistic improvements lie primarily in criteria that already show medium levels of implementation rather than in those with consistently low uptake. MPR evolves gradually and incorporates feedback from inspections and dialogue with businesses. In this context, the graphics point to potential for further development particularly in services related to cyclist comfort and convenience, such as e-bike infrastructure and food-related offers, without indicating a need to redefine the basic standards of the scheme.

Overall, the empirical evidence from the SME survey and the qualitative insights from the scheme interview consistently show that the MPR system in West Pomerania closely reflects existing SME practice. The alignment between scheme design and on-the-ground service provision is strong, entry barriers are low, and the differentiation between mandatory and optional criteria is clearly mirrored in the observed implementation patterns.

### 6.6.2 Germany – Bett und Bike

In Germany, the alignment between the Bett+Bike scheme and existing SME practices is generally high among accommodation providers, which dominate both scheme participation and the SME survey sample. Core requirements such as acceptance of one-night stays, provision of bicycle storage, and cyclist-oriented information are widely implemented among surveyed businesses, reflecting the long-standing focus of the scheme on fundamental cyclist needs.

The SME survey, however, was deliberately designed with a broad set of criteria in order to capture the full range of potentially offerable cycling-friendly services, including measures that

go beyond current certification standards. The fact that several of these services are rarely implemented, even among already engaged SMEs, should therefore not be interpreted as a direct shortcoming of existing schemes.

Instead, the results indicate that certain services—particularly those requiring additional infrastructure, dedicated space, or ongoing operational effort (e.g. advanced repair facilities, extensive e-bike services, or logistics-related offers)—are not part of everyday business practice for most accommodation providers. From a scheme perspective, this suggests that such measures are more suitable as optional or developmental elements rather than as mandatory certification criteria.

Entry barriers in Germany are thus less related to the feasibility of core requirements and more to the formalisation and economic implications of certification. Certification fees, administrative procedures, and compliance with optional higher-level criteria represent a relevant threshold, especially for smaller or seasonal businesses. While many SMEs already provide cyclist-friendly services informally, the transition to formal certification remains a significant step.

Sectoral fit is strong for accommodation providers but structurally limited for other SME types identified in the survey, such as gastronomy, attractions, and service providers, which fall outside the scope of the Bett+Bike scheme. Consequently, the scheme reflects the realities of a specific sector rather than the full diversity of cycling-related SMEs along routes.

In terms of development potential, the SME data suggest that Bett+Bike's primary role lies in consolidating widely established core standards and supporting incremental quality improvements. The survey results provide useful indications of emerging or aspirational services, but they also highlight that not all potentially desirable measures are realistic candidates for inclusion in formal certification criteria.

### 6.6.3 Denmark – Bed+Bike Denmark

The Danish SME survey results, as illustrated in the graphics of the Short Report, indicate a selective and uneven implementation of cycling-friendly services. Among surveyed businesses, basic services related to general hospitality and orientation for cyclists are relatively common. These include flexible service attitudes, access to information, and, in some cases, basic bicycle storage. This aligns with Denmark's overall cycling-friendly image and with the core focus of the Bed+Bike Denmark scheme.

At the same time, the graphics clearly show that more specialised or infrastructure-related services are implemented by only a limited share of SMEs. In particular, services related to secure indoor bicycle storage, repair infrastructure, washing and drying possibilities, or additional cyclist-oriented facilities are far from being standard practice. This pattern is visible even though the survey sample is likely biased towards businesses that are already interested in cycling tourism or engaged with cycling-friendly initiatives.

This finding is particularly relevant given the small overall number of certified businesses within the Danish scheme. The limited uptake suggests that, while core scheme requirements may be realistic for a subset of accommodation providers, the step towards formal certification remains substantial for many SMEs. Financial commitment through certification fees and the absence of public core funding further amplify this threshold.

The lack of data beyond accommodation significantly limits the analysis of sectoral fit and entry barriers. It remains unclear to what extent non-accommodation SMEs already provide cyclist-friendly services informally or how far they would be from meeting potential scheme requirements. Consequently, no reliable conclusions can be drawn regarding the alignment of scheme criteria with everyday business practices outside the accommodation sector.

In terms of development potential, the graphics suggest that realistic progress can be achieved primarily through incremental improvements of already partially implemented services, rather than through the introduction of additional or more demanding criteria. Measures that already show low implementation rates among engaged SMEs appear ill-suited for becoming mandatory scheme requirements and are better understood as optional or aspirational elements.

Overall, the Danish case illustrates that while the Bed+Bike Denmark scheme aligns well with a specific group of cycling-oriented accommodation providers, its current scale and the observed service distribution limit its ability to raise standards across the broader SME landscape without additional incentives or support mechanisms.

#### 6.6.4. Blekinge, Sweden

The data collected from Blekinge are very limited and must therefore be interpreted with caution. Due to the low number of participating SMEs and incomplete sectoral coverage, the results are included in this report primarily for the sake of completeness. The available data do not allow for any meaningful conclusions regarding the alignment of existing SME practices with cycling-friendly standards or potential national schemes, nor do they support reliable comparisons with other regions along EuroVelo 10.

#### 6.6.5 Klaipeda, Lithuania

The SME survey results from Lithuania, particularly from the Klaipėda region along EuroVelo 10, show that the absence of a formal cycling-friendly scheme does not equate to an absence of cycling-friendly services. On the contrary, the graphics indicate that a considerable number of SMEs already provide a range of cyclist-oriented services, especially those addressing basic needs such as safe bicycle parking, access to drinking water, free Wi-Fi, toilets, and seasonal opening during the cycling period. In several criteria, implementation levels are comparable to or even exceed those observed in regions with established schemes.

The lack of a national or regional scheme therefore results primarily in a lack of coherence rather than a lack of quality. The survey graphics show that cycling-friendly services are already implemented in practice, but not systematically aligned, labelled, or aggregated in a way that would make them easily identifiable for cycling tourists. According to the interviews, this also limits the ability of public actors to promote cycling-friendly offers in a structured manner or to integrate SMEs into international cycling tourism networks such as EuroVelo.

The survey data suggest that many SMEs would already meet a substantial share of basic criteria that are common in other European schemes. This indicates that the practical gap to a potential scheme entry is relatively small for a significant number of businesses, even in the absence of prior certification experience. The development potential in Klaipėda therefore lies less in raising standards and more in structuring and connecting existing offers. The survey

results point towards a strong basis for a low-threshold recommendation or visibility scheme that builds on already implemented services. Interview insights support this approach, emphasising that any future scheme would need to start with simple, clearly defined criteria focused on core cyclists' needs and rely on visibility and networking incentives rather than on enforcement or certification fees.

Overall, the Lithuanian case demonstrates that cycling-friendly SMEs already exist along EuroVelo 10, but their impact remains limited by the absence of a scheme that provides orientation, recognition, and aggregation. The empirical evidence suggests that a scheme in Lithuania could realistically build on existing practice, reduce fragmentation, and improve visibility for both SMEs and cycling tourists without requiring substantial changes to current business operations.

## 7. Insights from the European Scheme-Leader Meeting

The European meeting of Cycling Friendly Service Scheme leaders took place on 18 November 2025. The meeting brought together scheme representatives, tourism boards, cycling organizations and certification initiators from across Europe, including Austria, Belgium, Czech Republic, France, Poland, Romania, Slovenia, the Netherlands, Ireland and Germany, as well as representatives of the European Cyclists' Federation (ECF).

The purpose of the meeting was to exchange experiences on certification models, governance, and challenges and explore opportunities for European-level coordination, visibility and data aggregation.

### Diversity of Existing Cycling-Friendly Schemes in Europe

The meeting highlighted that cycling-friendly schemes across Europe differ significantly in:

- maturity and scale (from long-established systems with thousands of partners to newly created schemes),
- governance structures (NGOs, tourism boards, private initiatives),
- and scope of certification (accommodation-only vs. multi-service schemes including gastronomy and tourism services).

Examples presented included:

- Accueil Vélo (France) with over 10,000 certified partners and a long development history,
- Velo Popas (Romania) as a newer, self-funded certification system, managed by a tour operator
- MPR system, a regionally organised approach in Poland,
- Bike-friendly, the Brussels publicly subsidised label focusing on accommodation.

This diversity illustrates that there is no single European model, but rather a wide spectrum of nationally and regionally adapted solutions.

### Countries Without Established Schemes

The discussion explicitly addressed the absence of cycling-friendly schemes in certain countries, notably Ireland. The lack of an existing system was linked to:

- missing institutional structures,
- uncertainty about certification requirements,
- and limited experience with scheme implementation.

At the same time, interest in developing new schemes was expressed, underlining that absence does not equal lack of potential, but rather missing frameworks and guidance.

### Role of the European Cyclists' Federation (ECF)

ECF presented its role as a transnational coordinator of the EuroVelo network and its website as a visibility platform, particularly through the development of a dedicated Cycling Friendly Service Schemes webpage featuring an interactive map.

ECF sees its added value in:

- favouring the best quality of services by sharing knowledge on cyclists' needs,
- increasing visibility of certified services across borders,
- providing a European overview of existing schemes,
- and supporting mutual learning rather than imposing uniform standards.

Feedback from participants highlighted the importance of clear terminology, consistent naming, and transparent presentation of schemes at European level.

### Certification Criteria and Quality Assurance

Several contributions addressed challenges related to certification criteria:

- balancing accessibility for SMEs with quality requirements,
- adapting criteria to new developments such as e-bike usage,
- and ensuring that rapid growth does not dilute hospitality values.

The French Accueil Vélo label explicitly noted the tension between expansion and maintaining core service principles, a challenge echoed by other schemes.

### Funding and Sustainability Models

The meeting showed that most schemes rely on self-financing models, typically through:

- certification fees,
- own organisational resources,
- or project-based funding.

The Romanian Velo Popas scheme, for example, was developed entirely through own resources, highlighting both commitment and financial vulnerability of smaller initiatives. Financial sustainability emerged as a shared concern, especially for newer schemes.

### Fragmentation and Lack of Coordination

A recurring theme across contributions was the fragmentation of schemes, both within and between countries.

Key challenges identified:

- Multiple schemes operating in parallel with limited interoperability, as many schemes prefer to maintain their independence rather than integrate into a common framework
- Lack of standardised data structures and comparable indicators
- Limited aggregation of certified businesses at national and European level

Representatives from regions such as Western Pomerania and Pomorskie explicitly emphasised the need for better data coordination to understand the actual scale and impact of cycling-friendly services across Europe.

### Emerging Needs and Strategic Implications for the Report

Across all contributions, several cross-cutting needs became clear:

- stronger European-level visibility of cycling-friendly services,
- improved collection and aggregation of data,
- support structures for countries and regions without schemes,
- and knowledge transfer between mature and emerging systems.

The meeting underlined that cycling-friendly service schemes are increasingly seen as strategic instruments for cycling tourism development, but their effectiveness depends on coordination, clarity of purpose, and realistic integration into national tourism systems.

## 8. Discussion

Building on the findings from the SME survey, the scheme interviews, and the scheme leader meeting, the following discussion synthesizes the key insights and derives targeted recommendations for the further development of cycling-friendly schemes along EuroVelo 10.

### 8.1 Key Findings

- **Accommodation sector as the service backbone**

Across all three data sources, accommodation providers—especially hotels—consistently show the highest level of cycling-friendly service provision. The SME survey indicates strong coverage not only of basic services but also of more specialised offers (e.g. secure indoor storage, repair equipment, laundry options, early breakfast, packed lunches, and e-bike charging). This pattern was explicitly confirmed in both scheme interviews and the scheme leader meeting, where accommodation was described as the sector with the greatest operational capacity and willingness to integrate cycling tourism comprehensively.

- **Basic service provision dominates non-accommodation sectors**

The SME survey shows that most other sectors primarily provide low-threshold, basic cyclist services such as access to water and toilets, Wi-Fi, and basic bicycle parking. More specialised cyclist-oriented services are comparatively rare outside the accommodation sector. This observation was reinforced during the scheme leader meeting, where participants emphasised that gastronomy, attractions, retail, and service providers typically support cycling tourism in a complementary role rather than as a core business focus.

- **Low entry barriers despite uneven service depth**

Despite clear differences in service depth between sectors, the combined evidence shows that entry barriers to scheme participation remain low. The majority of SMEs across sectors already meet core requirements, particularly those related to basic cyclist needs. Scheme interviews underline that this low-threshold approach is intentional, aiming to maximize participation without forcing sectors into service profiles that exceed their operational scope

- **Schemes reflect sectoral practice, not marketing logic**

Scheme interviews indicate that scheme structures largely mirror existing SME practice rather than pursuing promotional or marketing-driven objectives. This was stated particularly clearly in the Danish interview, where it was emphasised that cycling-friendly schemes are explicitly *not* intended as a marketing gimmick, but as a quality-oriented framework grounded in actual service provision. The prominence of accommodation-related criteria therefore reflects empirical service realities rather than branding considerations.

- **Development potential focused on depth and coordination, not expansion across sectors**

All three sources suggest that future development should concentrate on strengthening service depth where capacity already exists—primarily within accommodation—and on improving coordination between sectors. There is no indication, either in the survey data or in the interviews, that schemes aim to push non-accommodation sectors towards providing advanced cyclist services beyond their operational scope.

- **Schemes as quality assurance and structuring instruments**  
Across interviews and the scheme leader meeting, schemes are consistently framed as tools for structuring, assuring, and making visible existing quality rather than as instruments for uniform service expansion or destination marketing.

## 8.2 Recommendations

### 8.2.1 For schemes

- **Maintain low-threshold core criteria**  
Schemes should continue to focus on a limited set of clearly defined core requirements that reflect services already widely implemented by SMEs and meeting cyclists needs. This approach supports broad participation, keeps entry barriers low, and ensures that schemes remain grounded in actual service provision rather than aspirational standards.
- **Strengthen the role of accommodation providers as quality anchors**  
Given their higher service depth and operational capacity, accommodation providers should remain the structural backbone of cycling-friendly schemes. Schemes can build on this by further refining accommodation-related criteria while avoiding unrealistic expectations for other sectors.
- **Clearly distinguish between mandatory and optional services**  
To reflect sectoral differences, schemes should maintain a transparent separation between basic requirements and additional or advanced services. Optional criteria can be used to encourage quality development without excluding SMEs that primarily provide basic cyclist support.
- **Improve coordination and visibility across sectors**  
Rather than expecting non-accommodation sectors to provide advanced cyclist services, schemes should strengthen referral, cooperation, and information-sharing mechanisms between SMEs. This can enhance the overall cycling experience without increasing individual service burdens.
- **Use schemes as learning and development frameworks**  
Schemes should integrate feedback loops, peer exchange, and guidance for SMEs to support gradual improvement of services where capacity already exists. Development should focus on depth and consistency rather than on expanding the number of criteria.
- **Support scheme development in countries without formal frameworks**  
In countries where no cycling-friendly schemes exist, low-threshold recommendation or visibility models should be prioritised. These schemes should build on existing SME practices, provide orientation and recognition, and avoid certification models that would introduce unnecessary barriers.

### 8.2.2 For SMEs

- **Consider joining a cycling-friendly scheme**  
The results of this report show that many SMEs already provide services that correspond to common cycling-friendly standards. Joining a scheme can help make these existing offers visible, increase credibility towards cycling tourists, and

strengthen integration into regional and international cycling tourism networks such as EuroVelo 10.

- **Use the survey results as orientation, not as a checklist**  
The criteria captured in this report are intended to provide inspiration and orientation rather than a mandatory list of requirements. SMEs can use the survey results to assess how their current services compare to typical cycling-friendly offers in their region and identify realistic next steps for improvement.
- **Build on existing strengths first**  
SMEs that already offer several cycling-friendly services should focus on consolidating and better communicating these strengths through scheme participation. Incremental enhancements can further improve attractiveness without requiring fundamental changes to business operations.
- **Start with basic cyclist needs where services are still limited**  
SMEs with little experience in cycling tourism should initially focus on providing basic, low-threshold services that are widely expected by cycling tourists. Achieving these basic standards supports competitiveness and facilitates entry into cycling-friendly schemes.
- **Use scheme participation to develop unique offers**  
Beyond meeting basic standards, SMEs are encouraged to use scheme membership as a framework for developing distinctive services, experiences, or collaborations that reflect their individual profile and local context.
- **View schemes as long-term development partners**  
Cycling-friendly schemes should be understood not only as labels, but as support structures that offer guidance, exchange, and visibility. Active participation can help SMEs adapt gradually to evolving demands in cycling tourism and strengthen their position along EuroVelo 10.

### 8.2.3 For public authorities

- **Support low-threshold, quality-oriented cycling-friendly schemes**  
Public authorities should prioritize the support and development of cycling-friendly schemes that are grounded in existing SME practice and focus on tangible service quality rather than marketing-driven certification. The findings show that low-entry, recommendation-based schemes are particularly effective in achieving broad SME participation.
- **Recognize and support non-accommodation services as essential actors within the cycling tourism ecosystem**  
While accommodation providers play a central role, the scheme leader meeting highlighted that a high-quality cycling experience depends on a broader service ecosystem. Gastronomy, attractions, bike services, and other tourism-related SMEs provide essential complementary services and should therefore be explicitly recognised as support- and funding-eligible within cycling tourism and mobility programs.
- **Strengthen national cycling-friendly schemes through public support**  
Discussions during the scheme leader meeting highlighted that strong national schemes can provide clearer orientation for both SMEs and cycling tourists. Public financial support can play an important role in lowering entry barriers for service

providers by reducing or removing certification fees. At the same time, our interview participants noted that the proliferation of multiple parallel schemes can create confusion for users. Establishing well-recognised national systems, combined with clearer alignment and visibility across countries, could therefore contribute to a more coherent and understandable quality framework along the EuroVelo network.

- **Integrate cycling-friendly schemes into broader EU mobility and tourism strategies**

Cycling-friendly schemes should be embedded into wider European frameworks for sustainable mobility, tourism development, and regional cohesion. Aligning schemes with initiatives such as EuroVelo strengthens cross-border coherence and maximizes their strategic impact.

## 9. Annex / Appendix

### 9.1 Criteria for the cycling friendly SME inventory

#### Category 1: Accommodation

Hotels, B&B, Private Accommodation, Chalets, Cottages, and Bungalows

- One night only stays possible (March to October)
- Safe bicycle parking and overnight storage: for example, a locked shed, a room in the basement, a fixed railing out of sight
- Free pump (better: bicycle repair tools for simple repairs, easily accessible. For inspiration see: ADFC Tool list (<https://www.outdooractive.com/en/poi/schwaebische-alb/free-repair-station-zell-u.-a.-/27210988/>))
- First aid kit
- Amenities to wash/dry clothes and equipment
- Free Wi-Fi
- Possibilities to fill a water bottle
- Contact and collaboration with local service partners, e.g. repair shops, luggage transport, taxi, tour operators. Information about their location, telephone number and opening hours on flyers/printables, business cards
- Early checkout, late check in
- E bike charging possibilities
- Information on regional cycling routes: e.g. maps
- Early breakfast or late lunch
- Offer of packed lunch
- Information for cycle tourists (basic information, brochures, flyers, personal advice about the nearest bike hire, the closest retailers to pick up extra essentials, local cafes, restaurants, hiking trails, nature reserves, museums)
- Own bike rental with a variety of different bicycles or collaboration with rental services
- Bus, train or ferry schedules and knowledge about their cycling friendliness

#### Camp Sites

- One night only stays possible (March to October)
- Safe bicycle parking and overnight storage: for example, a locked shed, a room in the basement, a fixed railing out of sight
- A separate zone for tents for bicyclists and other non-motorised guests
- Preferably grass surface, smooth and flat
- Rental options for tents or bungalows
- Free use of kitchen facilities: including cooking surface, food preparation area, sinks and water source, basic cookware, trash and recycling
- Possibility to shop for basic groceries
- Free pump (better: bicycle repair tools for simple repairs, easily accessible. For inspiration see: ADFC Tool list

(<https://www.outdooractive.com/en/poi/schwaebische-alb/free-repair-station-zell-u.-a.-/27210988/>)

- First aid kit
- Amenities to wash/dry clothes/equipment
- Free Wi-Fi
- Possibilities to fill a water bottle
- Contact and collaborations with local service partners, e.g. repair shops, luggage transport, taxi, tour operators. Information about their location, telephone number and opening hours on flyers/printables, business cards
- Early checkout, late check in
- E bike charging possibilities
- Information about regional cycling routes: e.g. maps
- Information for cycle tourists (basic information, brochures, flyers, personal advice about the nearest bike hire, the closest retailers to pick up extra essentials, local cafes, restaurants, hiking trails, nature reserves, museums)
- Own bike hire with a variety of different bicycled or collaboration with rental services
- Bus, train or ferry schedules and knowledge about their cycling friendliness

#### Category 2: Bike Services

- Bike rental: offering a variety of bicycle types
- Professional bike repair service
- Equipment shop (e.g. batteries, bottles, lamps, bicycle locks, helmets, pump, repair kit, tubes)
- Safe bicycle parking: for example, a locked shed, a room in the basement, a fixed railing out of sight
- First aid kit
- Free use of bicycle pump
- Amenities to clean bike equipment
- Open during whole cycling season (march to October)
- Pick-up service in case of bike failure or contact and collaborations with local transport service providers
- Free Wi-Fi
- Possibilities to fill a water bottle
- Free toilets
- E bike charging possibilities
- Information about regional cycling routes: e.g. maps
- Information for cycle tourists (basic information, brochures, flyers, personal advice about the nearest bike hire, the closest retailers to pick up extra essentials, local cafes, restaurants, hiking trails, nature reserves, museums)

#### Category 3: Gastronomy

restaurants, pubs, cafés, or other establishments offering food and drinks.

- Safe bicycle parking: for example, a locked shed, a room in the basement, a fixed railing out of sight
- Open during whole cycling season (march to October)

- Isotonic drinks, fruit and herbal teas
- Cyclists lunch menu/healthy food options, that could contain for example:
  - Protein for muscle repair (e.g. white meat, lentils, Fish, low fat beef, Beans, Tofu, Nuts, Seeds).
  - Carbohydrates for short lasting energy (e.g. wholegrain pasta, rice, quinoa, wholegrain bread).
  - Low amounts of saturated fats and high amounts of unsaturated fats for long lasting energy supply (e.g. Avocado, Nuts, Seeds, Fish)
  - Vitamins and minerals (Spinach, kale, salad, paprika, tomatoes, broccoli, all sorts of fruits).
- Offering of at least one warm vegetarian non-fried meal during the entire opening time
- Take-away options for meals/ lunch packages
- First aid kit
- Free Wi-Fi
- Possibilities to fill a water bottle
- free toilets
- Outlet provided for e-bike or other technical device charging
- Information about regional cycling routes: e.g. maps
- Information for cycle tourists (basic information, brochures, flyers, personal advice about the nearest bike hire, the closest retailers to pick up extra essentials, local cafes, restaurants, hiking trails, nature reserves, museums)
- integrated into dedicated cycling cuisine routes

Category 4: Tourist Attractions: *castles, chateaux, museums, tourist information services, open-air museums, natural sites.*

- Safe bicycle parking: for example, a locked shed, a room in the basement, a fixed railing out of sight
- Open during whole cycling season (march to October)
- Possibilities to fill a water bottle
- Free Wi-Fi
- Free pump (better: bicycle repair tools for simple repairs, easily accessible. For inspiration see: ADFC Tool list (<https://www.outdooractive.com/en/poi/schwaebische-alb/free-repair-station-zell-u.-a.-/27210988/>))
- First aid kit
- Take-away snacks and refreshments available (e.g. bottled isotonic drinks, energy bars)
- Lockable storage/boxes for travel luggage in the reach of guests
- free toilets
- Information about regional cycling routes: e.g. maps
- Information for cycle tourists (basic information, brochures, flyers, personal advice about the nearest bike hire, the closest retailers to pick up extra essentials, local cafes, restaurants, hiking trails, nature reserves, museums)

Category 5: Other Service Providers

*Services that don't fit categories 1-4 but are a benefit for cycling tourists and therefore worth inventorying.*

**Transport:**

- Taxi/shuttle services able to transport cyclists and their bicycles. could be used to support arrival via public transport or in case of emergency -
- Pick-up services in case of bicycle break down
- Interregional and regional public transport allowing cyclists to take their bikes with them. Trains/buses should be accessible with bikes
- Luggage Transport: Transporting luggage from one accommodation to the next

**Tour Operators:**

- Offering guided tours around the major tourist attractions
- Self-guided tours around the major tourist attractions, itinerary planning, hotel booking, restaurant reservations
- Available in different languages
- Offering tours at different difficulty levels

**Event Organizers**

- Dedicated cycling events, e.g. races or workshops