

WHO WE ARE

PROFILE

Q-Park is a leading off-street parking infrastructure owner and operator with well-managed commercial parking facilities across seven Western European countries. We operate off-street parking spaces we own, have under concession or with lease contracts from public and private landlords. We focus on off-street purpose-built parking facilities at strategic locations.

The seven countries in which we operate are the Netherlands, Germany, France, Belgium, United Kingdom, Ireland and Denmark. We are present in over 360 cities, have more than 5,300 parking facilities in our portfolio comprising over 1 million parking spaces. Based on publicly available industry data for

our competitors, we estimate that we are a top three player in terms of estimated off-street revenues in all the countries in which we operate.

Besides operating off-street parking facilities we also offer:

- | Off-street parking management
- | On-street parking and kerbside management
- | EV charging points
- | Parking as a Smart Service (PaSS) platform
 - | an industry leading seamless parking service; and
 - | a fully integrated cloud-based digital infrastructure.

Q-Park market position



Based on (estimated) off-street revenues.

We demonstrate that effective regulated and paid parking combined with smart tariff plans, and pre-booking propositions along with digital access and payment services, makes an economic and sustainable contribution to cities and society. Effective regulated

and paid parking positively influences how people enjoy their urban visit, journey, shopping, commute or residence.

STRENGTHS & TRENDS

We distinguish ourselves from competition with our quality portfolio of predominantly owned and long-leased off-street parking facilities in prime western European city centre locations, with our local market leadership positions, with our proprietary digital platform PaSS (Parking as a Smart Service), with our value-added EV charging propositions, with the longevity of our cash flow and a scalable parking-infrastructure platform which has tangible growth opportunities across our core parking business.

Together with key parking and digital infrastructure features underpinning our business model and the continuing regulatory shift in favour of off-street parking, our business benefits from a high level of stable and recurring cash flows.

Trends

We expect to benefit from the following key trends;

- | urbanisation - growing urban congestion driving the shift from on-street to off-street parking;
- | mobility mix - personal car ownership and private journeys continue to grow;
- | city as an experience - inner-city off-street parking ideally suited for longer stays;
- | liveability - shifting parking from on-street to off-street;
- | growth of paid parking - parking operators are important partners in creating accessible city centres;
- | digitalisation - off-street parking can offer smart digital solutions which customers want such as pre-booking, and
- | energy transition - off-street parking facilities are ideally suited to offer EV charging and energy management at scale.

Strengths

We are well positioned to take advantage of these trends given our;

- | continued focus on off-street parking;
- | strategically located parking assets to capture continued demand;
- | highly-developed and mature PaSS platform providing a digital parking ecosystem and seamless customer services, and
- | EV charging programme which substantially increases the number of EV charging points in our owned and long-leased parking facilities.