

ANNUAL CSR REPORT 2023

We
Develop
Quality

Urban liveability



REVIEW OF ACTIVITIES

SMP Programme

With our Sustainable Mobility Partnership (SMP) Programme, we aim to be part of the European Mobility Transition². We help cities implement their sustainable urban mobility plans (SUMPs) and address transport and mobility related challenges such as congestion, air and noise pollution, climate change, alternatives to fossil fuels, urban expansion and decreasing public budgets.

With our **mobility hubs** we offer urban solutions for accessibility, liveability, housing, sustainability and mobility equality, and transform search traffic into destination traffic and enable kerbside management optimisation.

Together with our **mobility partners** we seek ways to make sustainable mobility successful. Measures we can help introduce include:

- | transitioning from on-street to off-street parking;
- | transforming search traffic to destination traffic with smart navigation and pre-booking;
- | facilitating EV charging and shared mobility;
- | adding logistics services, bicycle parking and lockers in our parking facilities.

Sustainable mobility planning for the wider urban area involves focusing on communities, liveability and on individuals' mobility needs rather than accommodating traffic. And as the need for sustainable mobility increases, the focus is now shifting:

- | from cars to people (space & greenery);
- | from cars to active mobility (walking & cycling);
- | from owned to shared (car sharing & public transport);
- | from fossil fuels to emission-free transport (EV cars & EV logistics).

Definitions

Municipalities, urban planners, project developers and urban mobility advisors often consult us on mobility issues. As there are many different understandings on what a Mobility Hub is, we developed a Q-Park Mobility Hub (QMH) definition to clarify how, where and when we can connect with their plans and how it evolves in our portfolio. We also documented our own definition for a Sustainable Mobility Partnership (SMP).

To measure our impact on urban mobility we endeavour to quantify the number of QMHs and SMPs we have in our portfolio, based on these definitions.

Q-Park Mobility Hub (QMH)

A QMH is a parking facility

- | where one or more transport modalities and services are offered to our customers;
- | where people can interchange between car, public transport and/or shared mobility and micromobility options, including bicycle parking, shared micromobility services, and car rental services;
- | equipped with EV charging points, and may include fast-charging services;
- | connected to a digital ecosystem, enabling ANPR, pre-booking, parking app options and/or season ticket options;
- | which may also offer additional amenities such as urban logistic services, locker walls, retail and/or spaces for meetings and work.

Under this definition we have over 170 parking facilities in our existing portfolio as QMHs, showcasing that Q-Park has been part of urban mobility plans for some time now. In the coming years, we will adjust the look and feel of our QMHs to clarify their function and services, including co-branded partnerships.

² Mobility transition is a set of social, technological, political and partnership processes of converting traffic (including urban logistics) and mobility to sustainable transport with renewable energy resources, and an integration of several different modes of private transport and local public transport.

Figure 8: Q-Park Mobility Hub motorist access signage



In 2023 we started developing or opened the following Q-Park Mobility Hubs:

- | The Netherlands:
 - | Q-Park Centrum, The Hague
 - | Q-Park Frontenpark in Maastricht (under construction)
 - | Q-Park Zuidplein in Rotterdam
- | Belgium:
 - | Q-Park Astridplein in Antwerp
 - | Q-Park Steendok & Kooldok in Antwerp
- | UK:
 - | Q-Park Westminster parking facilities (area concept)
 - | Q-Park Park Lane
- | France - Q-Park's Paris La Défense parking facilities (area concept)
- | Denmark - Q-Park Nørreport, Copenhagen

Strategic Mobility Partnership (SMP)

A SMP encompasses contracts with:

- | public transport providers,
- | car sharing and/or car rental providers,
- | micromobility sharing and/or rental providers,
- | urban logistics providers,
- | mobility and/or payment app providers,

- | new mobility services and/or mobility innovations,
- | industry-related associations, funds, networks and/or platforms

In addition, we have strategic mobility partnerships with cities where we operate three or more parking facilities. We are invited to partake in their urban mobility plans as with our off-street parking portfolio we can make a considerably contribution to the intended mobility transition.

This SMP definition supports the achievement of our vision 'By 2030 we are the most preferred sustainable mobility hub partner' and our focus area 'Sustainable mobility solutions'. It will be part of our Performance Management Plans & Manuals (to be finalised in 2024) - ensuring proper measurement of progress over the years.

Communicating our concept

In 2023 we developed three banners to help us communicate the Q-Park Mobility Hub (QMH) concept. These illustrate:

- | Q-Park Sustainable Mobility Partner - our strategic move, urban area perspective and mobility hub services.
- | Q-Park PaSS - our digital platform including access and payment options, access portals such as online sales channels, parking and payment apps, management portals for fleets, visitors and events, and partner interfaces for mobility providers, municipalities and landlords.
- | Q-Park Mobility Hub - our definition showing the minimum requirements, the mobility choices and service options which are included.

Figure 9: Our three SMP talking points banners

Q-Park supports cities to achieve their mobility plans

Sustainable Mobility Partner

Trends & Developments

Less

- Cars on street
- Search traffic
- Air pollution
- Curbs & Vans

More

- Walking & Cycling
- Parks & Squares
- Electric vehicles
- Public transport

Strategic Move

Operator to Partner
Q-Park moves from traditional parking operator to sustainable mobility partner.

Location to Area
Q-Park moves from parking facility perspective to area perspective.

Urban Area Perspective

Parking Facilities → **Mobility Hubs** → **Urban Area**

Mobility Hub Services

- Mobility**: Car parking, Bicycle parking, Shared mobility, Public transport
- Energy**: EV charging, Production, Storage, Conversion
- Delivery**: Last mile delivery, Self storage, Locker walls, Parcel collection
- Activity**: Workspace, Retail & Car wash, Leisure & Events, Digital ecosystem

Q-Park Mobility Hubs

- UK - London Park Lane
- Belgium - Antwerp *Atterhalin*
- France - Chambéry *Castine Clara*
- Ireland - Dublin The Spire
- Germany - Berlin First
- NL - The Hague *Centrum*

www.q-park.com

Q-Park enhances seamless parking services with digital access and automatic payment

PaSS = Parking as a Smart Service

Independent of city, car park or parking system

Access & Payment

- ANPR
- QR code
- Automatic payment

Access Portals

- Online sales channels
- Customised sales channels
- Parking & Payment apps
- Fleet portal
- Visitor portal
- Event portal

Partner Interfaces

- Mobility Providers
- Municipalities
- Public & Private Landlords
- Data & Dashboards

Integrated ecosystem (scalable)

Incident case (SCS) → Various PMS brands → PaSS (public cloud) → Value partners (API)

Smart cities & Smart customers

- Urban Liveability & Sustainable Mobility
- Seamless Parking Journey & Pre-booking
- Economic Viability & Area Perspective

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Q-Park supports cities to achieve their mobility plans

Q-Park Mobility Hubs

Definition

Modalities ≥ 1

Service options

Minimum (PaSS enabled)

- Car Parking 24/7 & CCTV Surveillance
- Remote Control & Urban Proximity
- Parking Deals & EV Charging
- Parking Apps & ANPR

Mobility choices

- Micro-mobility (bicycles, e-bikes, e-scooters)
- Car sharing and/or car rental
- Public transport station

Service options

- Urban logistics & Lockers
- Retail, Leisure & Events

>170 in portfolio

Map of Europe showing countries: IE, UK, DK, NI, BE, DE, FR

7 AFFORDABLE AND CLEAN ENERGY

9 INDUSTRY INNOVATION AND INFRASTRUCTURE

11 SUSTAINABLE CITIES AND COMMUNITIES

17 PARTNERSHIPS FOR THE GOALS

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Partners share knowledge and expertise

At Q-Park we are more than willing to share our insights on urban mobility, EV charging for the parking industry, car parking needs and solutions for the sector as a whole. We enter into dialogue with municipalities and participate in the parking industry's professional bodies.

- | In 2023 we presented various mobility and parking events and we discussed our mobility hub programme with many municipalities in the Netherlands, Germany, Belgium and Denmark.
- | In 2023, we also contributed our expertise by participating in various project teams for the EPA (European Parking Association), APDS (Alliance for Parking Data Standards) and Vexpan.

Annual student award

Another way we share our expertise and encourage knowledge sharing in the sector is the annual student award. Q-Park initiated the Student Award in 2014 to combine theory and academic knowledge with the practical aspects of parking and mobility. Student research projects make a valuable contribution to bridging the knowledge gap.

This award, which is jointly run by Q-Park and Erasmus University Rotterdam, is open to all European universities and colleges. Since its inception in 2014, hundreds of students have participated with their projects.

Each year universities and colleges submit student projects after which an expert panel makes a shortlist which is then assessed by a jury of parking and mobility specialists at Q-Park and Erasmus University Rotterdam. And each year, the winning students give a brief presentation of their research and findings at the Thought Leadership event which is attended by a variety of interested parties including representatives from municipalities and people from the parking industry.

Each event has a topical theme to inspire and explore future directions of mobility and parking. Keynote speakers in recent years included:

- | **Derk Loorbach:** Director of DRIFT and Professor of Socio-economic Transitions at the Faculty of Social Science, both at Erasmus University Rotterdam.
- | **Lucas van Schijndel:** General Manager at Louwman BYD (Build Your Dreams).
- | **Larissa Suzuki:** Technical director at Google, visiting researcher at NASA's Jet Propulsion Laboratory, and Associate Professor at UCL.
- | **Carlo van de Weijer,** Managing Director of Eindhoven AI Systems Institute (EAISI) at TU Eindhoven and smart mobility expert
- | **Frank Quix,** Managing Director of Q&A Insights & Consultancy and retail expert.

Figure 13: Theme 2023: Urban Mobility Challenges



The annual event is an excellent networking opportunity for policy makers and those involved in the parking and mobility sector.

Significant new partnerships in 2023

A selection of country specific partnerships:

- 🌐 Q-Park & Shell to provide EV charging points in The Hague, the Netherlands
- 🌐 Q-Park & Saarbahn to provide public transport connection in Saarbrücken, Germany
- 🌐 Q-Park & Driveyou to provide car sharing services in Ireland
- 🌐 Q-Park & Infinium to support local zero-emission deliveries in London

Energy Portfolio Management

With many parking facilities at strategic urban locations, Q-Park plays a key role in facilitating EV charging for customers. The increasing numbers of full electric (BEV) and plug-in hybrid (PHEV) vehicles in car fleets are accelerating demand for charging infrastructure.

Upgrading our electricity supply to meet EV charging needs is a considerable challenge. One of the limiting factors is the grid capacity when planning additional EV charging points in our car parks. Expanding the number of EV charging points in our parking facilities is part of our business plan, but the energy transition is causing grid lock in many major European cities.

Our Energy Portfolio Management builds on the EV Charging Programme we launched in 2021. For our 2023 results, please visit the EV charging section in this report.

New opportunities

In 2023 we developed an energy roadmap, in which we implement technology & deploy resources to secure energy supply and reduce grid dependency.

Proof of concept

The Energy Hub as a concept is already live as a parking facility which includes solar panels, battery storage, EV charging (both AC & DC). This concept is scalable to other above-ground parking facilities, all part of our Energy Portfolio Management.

Developing 3D synergy

We have parking facilities at key locations in city centres and at ring-road hubs. Across our portfolio, we have identified some 140 parking facilities with exposed roof tops which are potentially suitable for solar and/or wind power generation.

Synergy arises where we can take advantage of space, energy and customer mobility:

- | Grip on grid
- | EV charging
- | Mobility hubs

Figure 14: 3D synergy model

