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EV charging stations, the picture of electromobility in Europe has changed drastically.

Add to that increased collaboration among energy companies, automobile companies, and EV charging equipment manufacturers, the number of EV charging points in Europe stands at 170,149 in 2019 from just 3,201 in 2010; the biggest growth being registered from 69,094 in 2015 to 132,114 in 2016.

The countries in which Q-Park operates now have substantial numbers of charging points and additional charging facilities are still being added.

Europe is already ahead of the goal of one charging station per 10 electric vehicles. However, the infrastructure must continue expanding to cater to the growing number of electric vehicles that hit the road each year. It is estimated that by 2025, 14% of all light vehicles sold in Europe would be electric.

In Europe, 79% of the public charging infrastructure is operated by utilities and oil companies.

Source; <https://www.prosperoevents.com/our-services/item/398-electric-vehicle-charging-infrastructure-in-europe>

There's more to EV charging than meets the eye

We continue to monitor market developments regarding EV charging and to conduct our own research. Governments throughout Europe are introducing regulations regarding the availability of e-car charging points in purpose-built car parks and on-street.

We want to be prepared so we meet the requirements. This means that when we conduct major refurbishments to any of our parking facilities, we include e-charging stations were relevant.

Targets & Actions

We have defined the following ambitions regarding e-charging. We will continue to increase the numbers of:

- | parking facilities with e-charging stations by at least 10% per year till 2025;
- | e-charging stations by at least 10% per year till 2025;
- | e-charging stations based on an international e-charging policy, to be created by the expert team 'Energy Management'.

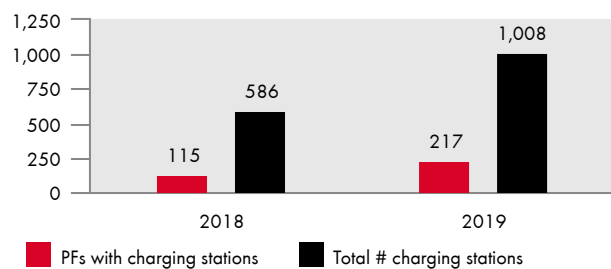
In addition, we have plans to:

- | improve definitions and reporting as there are various interpretations of e-charging stations.
- | embrace new technology to face e-charging challenges related to grid capacity and human behaviour aspects.

Results

In 2019, Q-Park had 1,008 (2018: 586) e-charging stations in more than 217 (2018: 115) parking facilities, an increase of 72.0% and 88.7% respectively.

Chart 21: E-charging stations



More about our thoughts on EV dilemmas.

Digital services

PaSS PlatePay

In 2019 we implemented our innovation PaSS PlatePay in most of our parking facilities in Belgium and in a few parking facilities in the Netherlands, enabling pre-booking propositions for Park+Fly as well as Event Parking.

This innovation relies on ANPR to grant customers access to the parking facility. They do not need to present their bank card or take a ticket, and as the parking is automatically paid for, they can simply drive to the exit barrier. Our systems recognise their number plate and open the barrier.

PaSS PlatePay is very easy to use. Customers register their number plate in the mobile-app of their choice to access and exit a Q-Park parking facility by means of their number plate which is connected to a payment method. There's no need to wind down the window to take a ticket or present a payment card.

This innovation allows us to create partnerships with payment providers who seek to provide additional services for their customers. This innovation enables our customers to:

- | Effortlessly access and exit our car parks
- | Use their preferred payment method
- | Pre-book their parking space:
 - | At a favourable rate
 - | Be assured there is a space for them

Results in 2019

- | Q-Park Belgium:
 - | 35 parking facilities equipped for PaSS PlatePay
- | Q-Park Netherlands:
 - | 2 parking facilities equipped for Park + Fly
 - | 4 parking facilities equipped for Event Parking

Figure 24: Parking as a Smart Service



PARKING AS A SMART SERVICE

Powered by Q-Park

Digital payments

Cashless and contactless payments

In response to changes in customer needs and behaviour, digital and payment trends, and the evolution of smart cities, we are constantly developing our parking management systems and our operational processes. We have offered various cashless and contactless payment options at all our parking facilities since 2016.

Naturally, on accessing the car park, a motorist can still take a traditional paper ticket and pay by cash or card at a Pay-On-Foot (POF) machine before driving to the exit, but cashless and contactless payments continue to gain in popularity.

Cashless and contactless payments enable motorists to access and exit a parking facility using their payment card, just as they would pay for their groceries. This contemporary way of paying for parking enhances the customer experience and at the same time makes our payment transaction systems future-proof.

Top four advantages for the customer:

- | Customers can access and exit the car park using their debit or credit card, partner loyalty card, or smartphone
- | Customers save time as they don't have to go to the Pay-On-Foot machine
- | No paper ticket to lose
- | No need to carry change

All these developments reduce the total investment and cost of ownership of the parking management system, making a cashless and contactless barrier system even viable in smaller car parks. Some car parks are even 'cashless only'.

Figure 25: Cashless and contactless payments



Results

All of our owned and long-leased parking facilities offer digital payment options.

Validation

We offer a number of schemes to assist our purpose partners. We call this validation – it means that our partners can reimburse their customers for all or part of their parking fee. This may be in the form of a free exit ticket or specific time or value reduction on a parking transaction. For example:

- | First hour for free when they spend EUR 20 or more at a grocery store;
- | EUR 2 discount when they spend EUR 20 or more at a fashion store.

Q-Park UK has launched a loyalty programme in conjunction with purpose partners.

Q-Park customers can easily earn benefits using the Q-Park Rewards app. Customers register their bank card in the app and use that card to pay for parking at Q-Park or one of the many high-street retail partners. Q-Park tracks the payment and gives the customer rewards and benefits based on the amount spent on parking.

Q-Park UK has teamed up with a number of national retailers where customers can earn cashback rewards when they pay with their registered bank card.