

The background of the entire page is a photograph of a vibrant urban living space. In the foreground, a large, leafy green tree stands next to a tall, dark green lamppost. A woman is sitting on a wooden bench in front of the tree. To the right, a young boy is standing near a small fountain that sprays water upwards. In the background, there are more trees, a paved plaza with people walking, and several multi-story buildings with classic architectural features. The sky is clear and blue.

We create urban  
living spaces





# Best in Parking

## LEADER IN PARKING AND MOBILITY SOLUTIONS

Best in Parking is one of the leading developers, owners and operators of parking and mobility infrastructure in Europe with the core markets of Austria, Italy and Croatia. Best in Parking is not only continuously expanding its offering in its core markets, but is also focusing on growth markets in Southeastern Europe, such as Slovenia, Serbia and Albania. The company also has locations in Switzerland and Slovakia. Driven by this growth strategy, the network of locations has been significantly expanded in recent years (for details, see page 6) – Best in Parking achieved above-average profitability compared to the rest of the industry.

Best in Parking currently operates around 84,000 parking spaces at over 190 sites in prime locations in 40 cities. The focus is on long-term contracts, with an average residual contract duration of more than 50 years. Best in Parking offers an attractive and broadly diversified portfolio that primarily includes locations in city centres, but also park & ride/rail locations as well as parking garages in residential areas, at shopping malls and hospitals. The portfolio is supplemented by on-street locations, i.e. unrestricted parking areas on public roads, involving parking space management for entire cities.

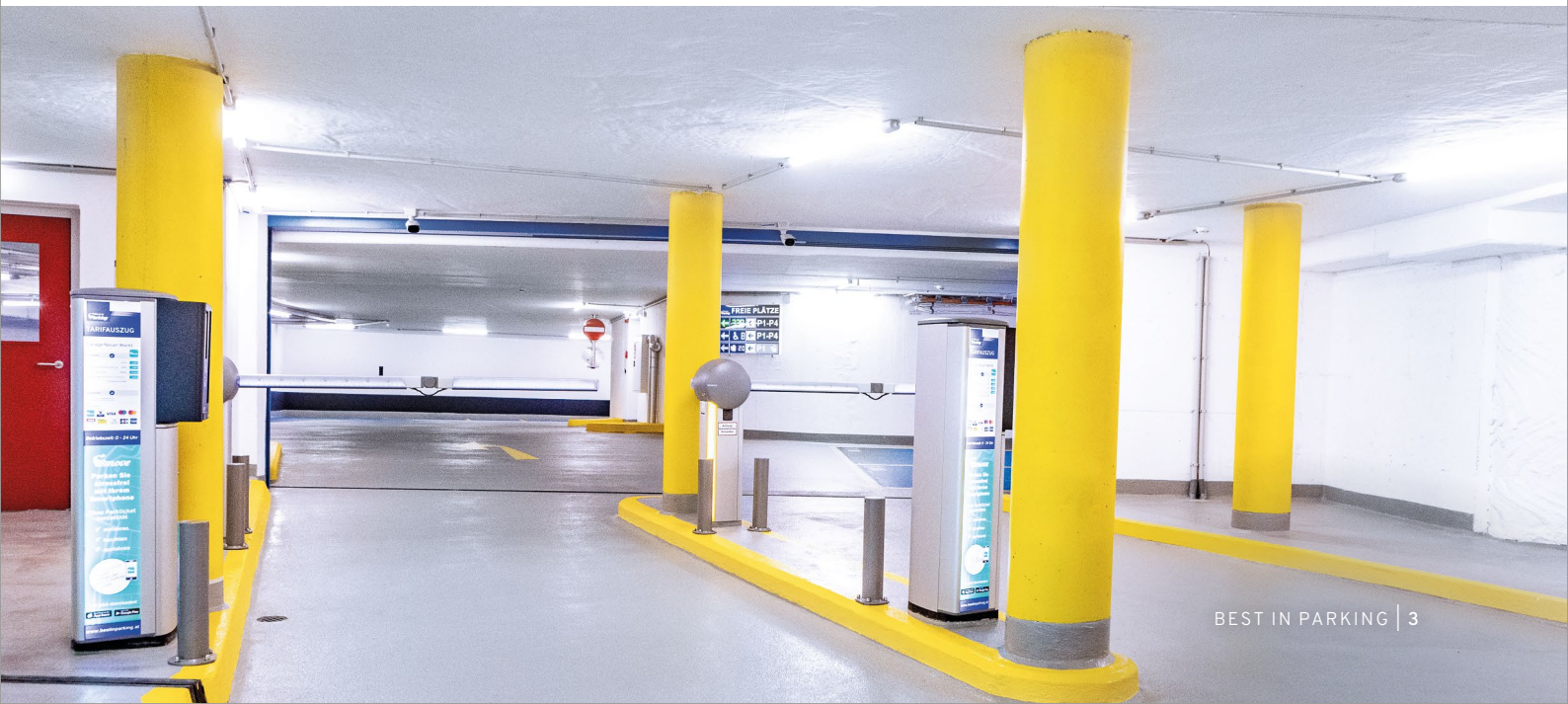
In addition to its geographical expansion, the company is developing from a pure parking operator to a pioneer for smart & climate active cities (for details, see page 8). Best in Parking covers the entire vertical service

chain of parking and mobility solutions, beginning with the idea and planning through to operation and maintenance. The company's long-standing experience in project development is a clear competitive advantage. Best in Parking has many years of experience supporting public administrations by working closely with them to plan entire districts. The majority of locations are operated under long-term concessions and building leases, or are owned by Best in Parking. In addition to parking operations, the company's offering is rounded off by digital and sustainable solutions to implement future concepts for mobility in European cities (for details, see page 9). The offering includes innovative parking and payment services and integrated IT solutions as well as new business models such as EV charging to transform parking garages into mobility hubs of the future. The company also uses sustainable solutions when building parking garages – its subsidiary Flexiskin implements innovative and resource-saving floor coatings inside parking garages.

## MANY YEARS OF EXPERIENCE

The parent company, Breiteneder Immobilien Parking AG, is a family-run company and has been operating parking facilities for more than 45 years. In 2020, the parking operating and mobility solutions business units were bundled to form Best in Parking AG and separated from other business activities in the real estate sector. In addition to CEO Johann Breiteneder, who has worked for the company for 27 years, the company's management team and regional directors also have many years of experience in parking and mobility solutions.

LOCATIONS





# Business model and strategy

## MARKET TRENDS

Mobility and transport are changing. In cities in particular, the trend is towards making transport more climate-friendly and to harmonise all forms of mobility. Parking developers and operators can make a significant contribution to this. In order to improve the quality of life in cities, surface parking spaces are being continuously reduced and converted to paid parking. Due to the lower availability of on-street parking, more and more drivers head straight to parking garages, which reduces emission-intensive traffic looking for a parking space. In addition, park & ride/rail facilities are increasingly being used to reach the destination by public transport. It is expected that this trend will continue in the future, with private transport remaining a significant part of the mobility mix. The number of cars registered across Europe has increased steadily in recent years. Car traffic is becoming ever more climate-friendly, and because the share of electric vehicles is increasing significantly, this is leading to new requirements for charging infrastructure. This is another area where parking developers and operators can make a significant contribution (see page 9 for details).

## COMPETITIVE ENVIRONMENT AND MARKET POTENTIAL

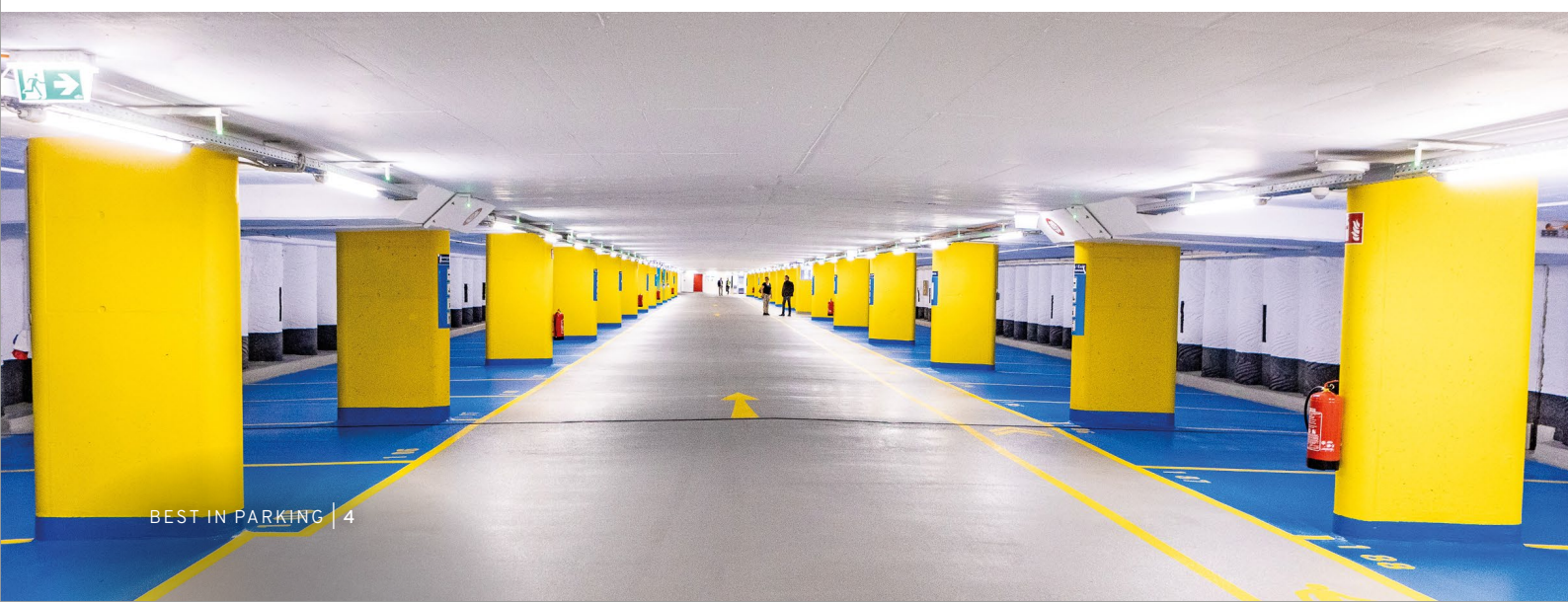
In 2021, Best in Parking generated 95% of its revenue in the core markets of Austria, Italy and Croatia. Further growth is forecast for these markets over the next six years. In Austria and Italy, an average annual growth rate of around 5% is expected until 2028 (Austria 4.4%,

Italy 5.2%), while in Croatia it could even exceed 9%<sup>1</sup>. Because of Best in Parking's strong market position in all core markets, the company is expected to disproportionately benefit from this market growth. The company is the market leader in Austria, with prime locations such as the parking garages at Neuer Markt and Am Hof in Vienna, as well as Promenade in Linz are part of the portfolio. Best in Parking is also one of the market leaders in Italy, with a strong presence in the high-income regions of northern Italy, including exclusive locations such as Piazza Meda in Milan. In both markets, Best in Parking has higher profitability and a longer residual contract duration than its competitors. With locations such as Cvjetni Centar in Zagreb, Best in Parking is also the market leader among privately-owned providers in Croatia. This strong presence in a market that is still developing provides a good basis for further expansion steps in Southeastern Europe.

## STRATEGY

- ▶ Expand market leadership in core markets
- ▶ Continue regional expansion in Southeastern Europe
- ▶ Accelerate digitalisation to improve customer experience with app solutions
- ▶ Expand EV charging stations and position parking garages as EV charging stations of the future
- ▶ Create smart city solutions in partnership with public administrations

<sup>1</sup> Source: Parkopedia and EPA 2022, market trends based on consumer spending = total market revenue for parking (on- and off-street)



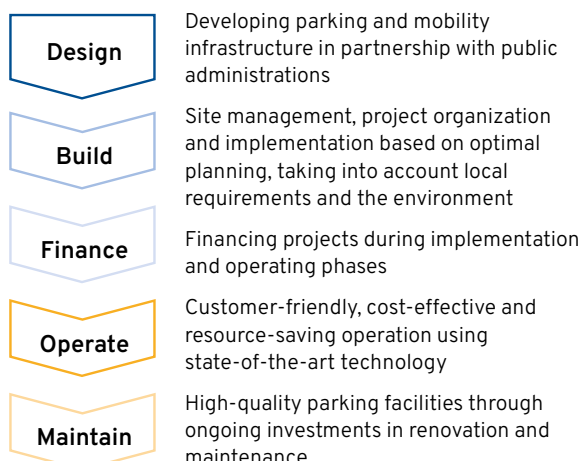


*“Best in Parking is a developer, owner and operator of parking and mobility infrastructure in Europe. Since the company was founded in 1976, we have grown continuously and strongly. Our know-how and expertise together with a high-quality portfolio form a solid basis for further growth.”*

**Johann Breiteneder, CEO**

## VALUE CHAIN

In its core business, Best in Parking covers the parking value chain – from development to operation and maintenance. Consequently, the company is positioned as an established partner for public administrations for parking and mobility solutions. Best in Parking relies on long-term contracts with high profitability at prime locations.



## BEST IN PARKING COMPANY TIMELINE

- 1976**  
Founded by Johann Breiteneder sen.
- 1983**  
Entered Italian market
- 2005**  
Entered Swiss market
- 2005**  
Entered on-street parking sector
- 2016**  
Entered Slovakian market
- 2017**  
Entered Croatian market
- 2018**  
Entered Slovenian market
- 2020**  
Entered Serbian market
- 2021**  
Entered Albanian market
- 2021**  
Acquired Bmove d.o.o. (digital payment platform)
- 2021**  
Acquired RAO d.o.o. (leading IT supplier for smart city solutions)
- 2022**  
Acquired 51% stake in Flexiskin (provider of innovative floor coatings)

# Sustainable success

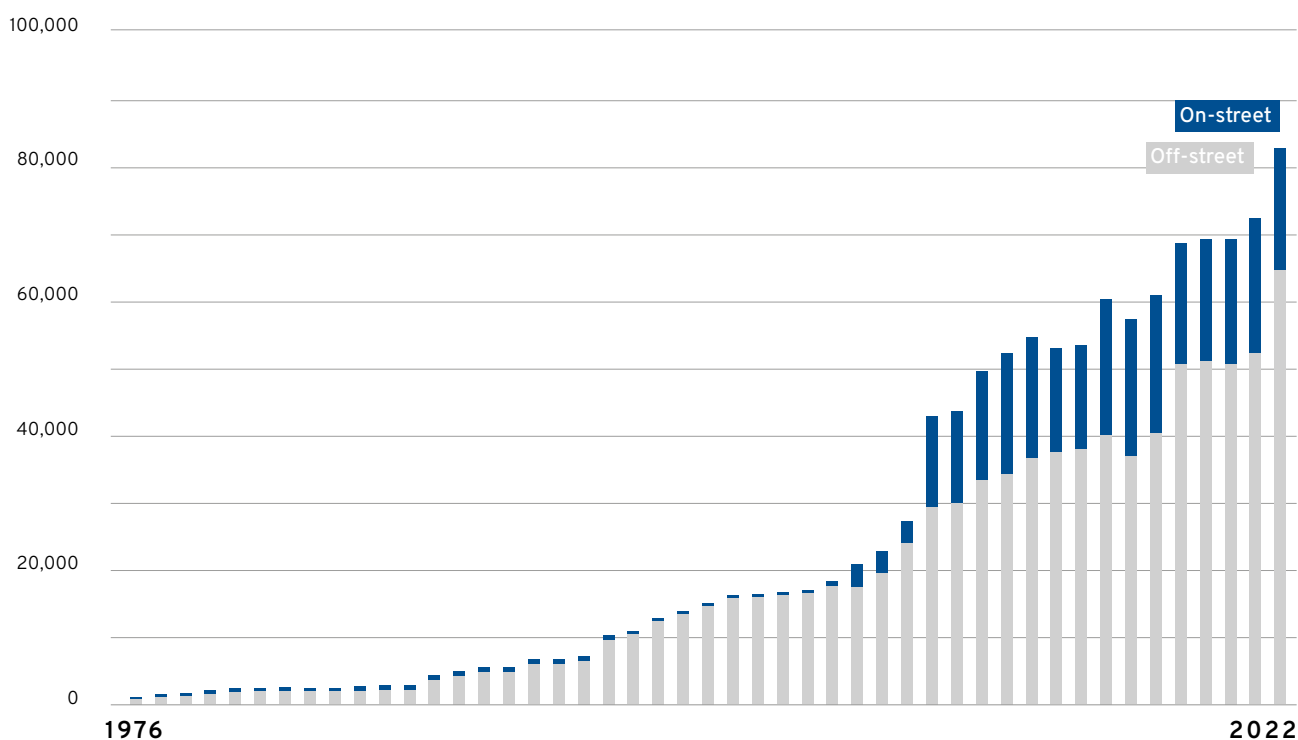
Decades of experience and a network of high-quality locations form the basis for value retention and sustainable revenues. Long-term contracts create excellent visibility for future cash flows. The average portfolio residual contract duration is more than 50 years. In addition, Best in Parking shows above-average growth and profitability compared to the rest of the industry. This course of growth is to be continued in the future, supported by innovative solutions for sustainable parking facilities and mobility management.

## BUSINESS HIGHLIGHTS

- ▶ Focus on prime locations and long-term contracts that increase profitability and have a positive effect on cash flow
- ▶ Infrastructure portfolio offers high visibility for future cash flows
- ▶ Low interest rate sensitivity and opportunities to pass on increases due to inflation to customers
- ▶ A well-stocked pipeline of profitable new projects in the core business and new digital solutions strengthen customer loyalty and cross-selling

## GROWTH SINCE 1976

Parking spaces



Off-street: parking space which is separated from the public domain through a barrier  
On-street: chargeable parking spaces without a barrier on public roads



# Best in ESG

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## ENVIRONMENT

- ▶ Supporting public administrations in developing climate-friendly mobility concepts (e.g. lower CO<sub>2</sub> emissions by reducing traffic searching for parking spaces)
- ▶ Supporting the creation of additional inner-city green spaces
- ▶ Planning new climate-sensitive parking areas with optimal use of land and building materials
- ▶ Expanding EV charging network from 463 charging points to over 1,000
- ▶ Expanding own electricity production – 5 more photovoltaic systems planned

## GOVERNANCE

- ▶ Compliance with the Austrian Corporate Governance Code
- ▶ 50% female quota on the supervisory board
- ▶ Implementation of non-financial indicators in the compensation system

## SOCIAL

- ▶ Increasing the quality of life in cities with additional open spaces
- ▶ Reducing stationary traffic to make space for gastronomy and recreation
- ▶ Preserving cultural heritage by restoring monuments
- ▶ Optimising barrier-free accessibility in parking garages

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## Goals 2023

- ▶ Implementation of group-wide ESG indicators (KPIs)
- ▶ Sustainability reporting according to the Global Reporting Initiative (GRI)







# Smart & Climate Active Cities

## THE CITIES OF THE FUTURE

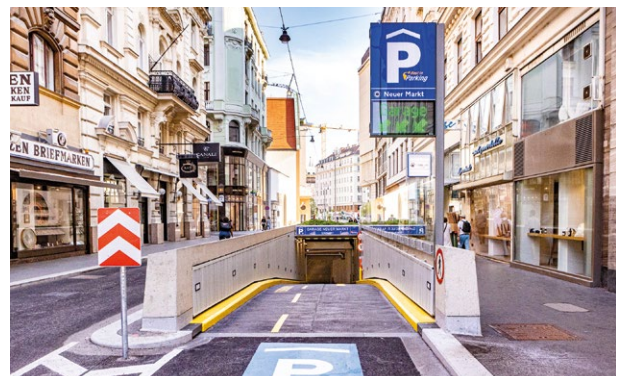
Predictive urban planning is more important today than ever before – the demands placed on modern living space are changing and the climate crisis brings a number of new challenges. One of the most important cornerstones of a smart and climate-friendly city is mobility. It is important to give living space back to people and nature. The smart planning of parking areas plays a central role in this. At the same time, intelligent technologies can be used to improve the quality of life of the inhabitants. Parking and mobility solutions will play a key role in the intelligent city of the future. Parking garages will act as a hub for mobility services and will become EV charging stations of the future.

## SMART CITY FEATURES

- ▶ Reducing pollution and improving the climate balance
- ▶ Moving parking spaces off the street into parking garages and improving the cityscape by widening footpaths and cycle paths as well as larger pedestrian zones with space for restaurants
- ▶ Promoting recreational areas by expanding public green spaces and reducing inner-city temperatures in summer
- ▶ Lower emissions through intelligent traffic management and minimising traffic by avoiding the search for a parking space
- ▶ Improving mobility offering thanks to the ongoing expansion of the EV charging station infrastructure

## NEUER MARKT PARKING GARAGE

With 10,000 m<sup>2</sup> of urban space, the redesign of the Neuer Markt is the largest transformation project in the historic centre of Vienna and one of the latest examples of successful parking space development. Following the construction of an underground parking garage, the square, which was previously dominated by parked cars, has been transformed into a charming piazza with outdoor eateries and trees in the middle of Vienna's city centre. Intelligent and environmentally friendly planning decisions as well as the latest technologies and lighting and traffic guidance systems have helped to ensure that the newly built underground parking garage is easily accessible even during peak hours. The parking garage was opened in September 2022 and offers more than 400 parking spaces and numerous charging stations for electric vehicles. Special attention was paid to sustainable and durable construction in all phases of planning and building the underground car park.





# Sustainable Mobility



**463 EV charging points**

As of September 2022



**295 kWp photovoltaic system**

## SUSTAINABLE MOBILITY CONCEPTS

By 2050, around 70% of the world's population will live in cities<sup>1</sup>. This causes major challenges, particularly in terms of mobility and urban planning. That is because cars will continue to be an important part of the mobility mix. From 2014 to 2020, the number of vehicles in Europe increased from 224.2 million to 250.4 million<sup>2</sup> – and the trend continues, as the increasing number of car registrations shows<sup>3</sup>. With innovative concepts, a focus on sustainability and commitment to digitalisation, Best in Parking provides efficient and sustainable solutions that counteract both soil sealing and CO<sub>2</sub> emissions. In view of the rapid switch to fully electric drives – in Europe, 78% of vehicle sales<sup>4</sup> are expected to be electric or hybrid cars by 2030 – Best in Parking has gradually expanded the number of EV charging stations available.

Best in Parking already offers 463 charging points in its parking garages. As a consequence of the ongoing transition to e-mobility, the company plans to significantly expand its network of charging stations for electric vehicles and, if possible, to operate them using solar energy generated by the company itself. Shared mobility services will also continue to gain in importance and could be another opportunity for parking operators.

[www.bestinmobility.com](http://www.bestinmobility.com)

## EV CHARGING

- ▶ 463 EV charging points currently in operation, expansion to 1,000 planned by 2025
- ▶ Costs are deducted in the same payment process together with the parking ticket or using the Bmove app

## PHOTOVOLTAIC SYSTEMS

- ▶ Generating renewable energy to supply locations and EV charging stations
- ▶ 1 location in operation, another 5 locations planned

## SUSTAINABLE MOBILITY – PRATER GARAGE SETS AN EXAMPLE

Since summer 2022, the parking garage at Prater in Vienna has been setting new standards in terms of sustainability. The parking garage has 16 charging points for electric vehicles and also produces its own electricity using the company's first roof-top photovoltaic system. The system has an output of 295 kWp and is therefore not only self-sufficient in energy, but also produces more electricity than the parking garage itself requires, that is then made available at night thanks to a hydrogen energy storage system. The Prater parking garage also sets an example in terms of accessibility. It offers parking spaces with barrier-free access on all levels for people with walking difficulties.

<sup>1</sup> Source: The United Nations (2018)

<sup>2</sup> Source: Eurostat (Passenger cars, by type of motor energy and size of engine 2020)

<sup>3</sup> Source: ESG Association (European Vehicle Powertrain Forecast 2021-2035)

<sup>4</sup> Source: International Energy Agency (Global EV Outlook 2021)





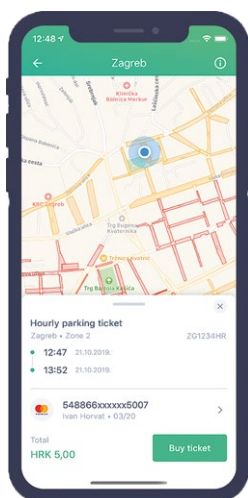
# Best in Parking Technology

## DIGITAL SERVICES AND BUILDING TECHNOLOGIES

Digitalising parking processes to improve the customer experience has the highest priority for Best in Parking. The expansion of the range of services along the value chain strengthens Best in Parking's market position as a full-service provider for parking and mobility solutions. The company focuses on both its own developments and acquisitions. Important milestones in 2021 were the acquisitions of Bmove d.o.o., the operator of a pay-by-use app, and RAO d.o.o., a leading IT provider for smart city solutions. As a result, the company has laid an important foundation for its transformation process: The parking garage is becoming the digital mobility hub of the future. The innovations are not limited to the digital sector; Best in Parking is also setting new market standards in the area of building technologies. Flexiskin, acquired in 2022, has developed a new, more sustainable flooring technology that is protected by Europe-wide patents and is used at the company's own locations as well as those of external customers.



**BMOVE**



- ▶ Already 600,000 users with an estimated 33 million transactions in 2022
- ▶ Goal: making the parking process easier, faster and more convenient
- ▶ Contactless entry and exit as well as mobile payments in off-street area using pay-by-use function
- ▶ Already around 160 cities with further on-street expansion planned

[www.bmove.com](http://www.bmove.com)



### RAO - SMART CITY IT SOLUTION

Following the acquisition of RAO, Best in Parking has expanded its range of services for smart city solutions. With more than 25 years of experience, RAO offers proven software solutions for efficient management and control of public parking spaces.

- ▶ Holistic and individual parking management solutions
- ▶ Traffic monitoring and ticketing (including breakdown services)
- ▶ Information system for traffic management
- ▶ Electronic payment, ticket control and visitor management
- ▶ Accounting systems for marinas
- ▶ Admission and ticketing solutions for national parks, nature reserves, museums, cultural monuments, etc.

[www.rao.hr](http://www.rao.hr)

## FLEXISKIN



Sustainable and high-quality construction and renovation are essential for the long-term and resource-saving conservation of buildings. Flexiskin specialises in coating technologies and waterproofing, in particular spray films and spray coatings for floors and parking garage surfaces, building envelopes and roof seals. Flexiskin has patents for parking garage floor coatings and bridge seals and has developed innovative products in recent years. Best in Parking acquired a 51% stake in Flexiskin in 2022.

[www.flexiskin.at](http://www.flexiskin.at)





  
Prater

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