Oaklins



Shifting gears

NEWSLETTER | SMART PARKING & MOBILITY SOLUTIONS | NOVEMBER 2026

"Smart parking is evolving from standalone hardware and fragmented software towards complete parking management systems, bringing software, payments, reservations and enforcement into a connected offering. For consolidators and investors, the opportunity lies in building these platforms through acquisitions of specialist technology champions and leading local providers with complementary capabilities, established customer relationships and access to new markets."

MARTIJN DE WIN
TECHNOLOGY SPECIALIST
OAKLINS NETHERLANDS



Market trends

Explore the European smart parking market, projected to grow from $4.1bn in 2025 to $12.9bn by 2033, driven by smart city initiatives, EV adoption and increasingly integrated, data-driven parking solutions.

04

Key M&A drivers in the smart parking environment

– Platform consolidation
– Tech stack augmentation
– Adjacent vertical convergence
– Growing infrastructure capital allocation

07

M&A

Smart parking M&A activity reached 20 deals in 2025, up from 14 in 2024. Explore how platform consolidation, technology-driven acquisitions and growing infrastructure investment are reshaping the sector.

07

Transactions

Discover recent European transactions across the smart parking value chain, from infrastructure investments to digital platform acquisitions, and the strategic rationale driving consolidation in this evolving market.

08

About Oaklins

Leading mid-market M&A advisor with a global footprint

Our services

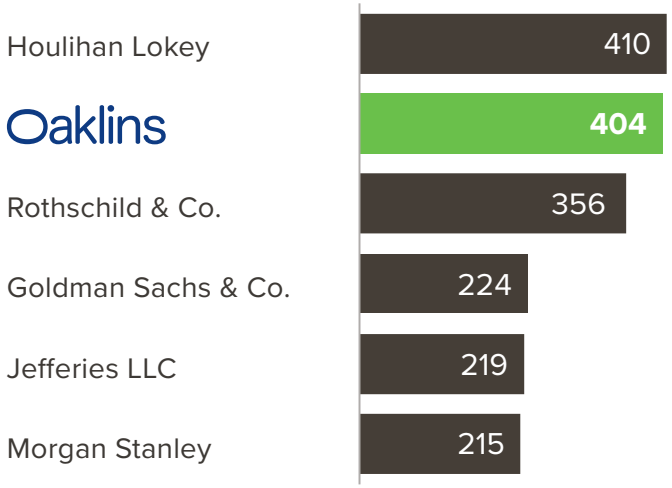
Mergers & Acquisitions

- Sell-side advisory
- Buy-side advisory
- Corporate divestitures
- Fundraising
- Fairness opinions

Debt Advisory

- Refinancing
- Acquisition financing
- Restructuring

League table 2025 (by deal count)[1]

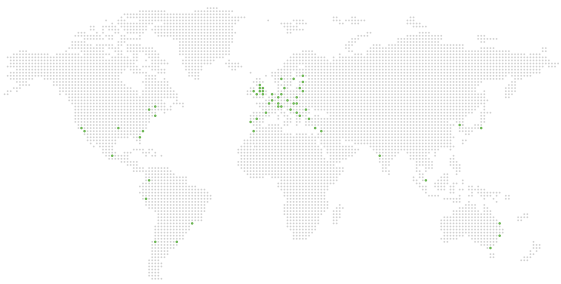


Global footprint

900+
advisors

60+
offices

40+
countries



Focus on dedicated industry groups



1LSEG.com/en – Mid-Market Financial Advisory Review 2025; excluding auditing firms

Smart parking solutions

Smart parking's next phase is about connecting technology with scale. Consolidators such as Metropolis and Arrive, formerly EasyPark Group, illustrate how acquisitions can bring together parking networks, digital payments and automation. For buyers, the opportunity is to improve the user experience and help operators get more value from their assets.



Martijn de Win
Director
Tel: +31 6 1993 4831
m.dewin@nl.oaklins.com

Smart parking is moving beyond its hardware roots. Value increasingly comes from software, data and automation that connect access, payments and space utilization in real time. As operators manage more locations and mobility use cases, the focus is shifting from controlling individual sites to managing a connected parking ecosystem and improving the user experience.



Felix Stehr
Associate Director
Tel: +49 152 09192953
f.stehr@de.oaklins.com

Selected international parking experts



Our key coverage areas



Executive summary

>$4.1bn
European market size

~20%
Market growth

20
Deals (2025)



The growing importance of parking as a lever for mobility

Parking is increasingly a strategic lever for managing traffic, land use and modal split. EU initiatives like PARK4SUMP highlight its role in cutting congestion and emissions.



Shift from hardware to integrated platform models

The market is shifting from standalone sensors to platforms combining occupancy data, navigation, reservations and payment. Recurring software and service revenues are displacing one-off hardware projects.



Data-driven management and dynamic pricing are gaining importance

Real-time data enables demand management, higher utilization and differentiated pricing. Dynamic pricing increasingly steers occupancy and improves profitability.



Technological shifts toward scalable, hybrid systems

Wireless IoT sensors, computer vision, ANPR and AI occupancy forecasting are shaping the market. Hybrid setups are gaining traction for better accuracy and reliability.



Integration with kerbside management, EV charging and mobility hubs

Links to EV charging, shared mobility, city logistics and P+R are gaining strategic relevance, moving parking toward integrated urban access.

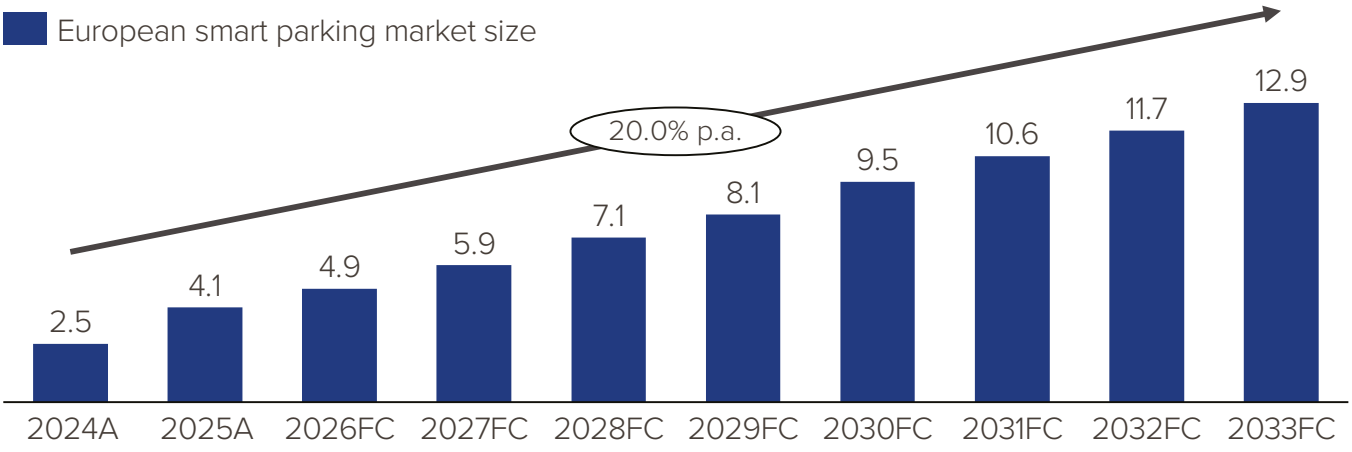
Growth outlook

The outlook is structurally positive but not risk free. Key drivers are urbanization, political focus on sustainable mobility, professionalization of municipal management and falling technology barriers through IoT, cloud and AI. Above average growth is expected in scalable platform and service segments such as dynamic pricing, digital access and occupancy forecasting. However, fragmented responsibilities, heterogeneous municipal procurement and data protection requirements constrain scaling.

Market size and drivers

European smart parking market size (2024–2033)

(in $bn)



▲ Growth drivers

Smart city programs
Growing demand for real-time data and scalable cloud solutions.

Rapid EV adoption
EV charging bundled with parking; V2G upside.

Urbanization
~75.7% of EU citizens now live in cities.

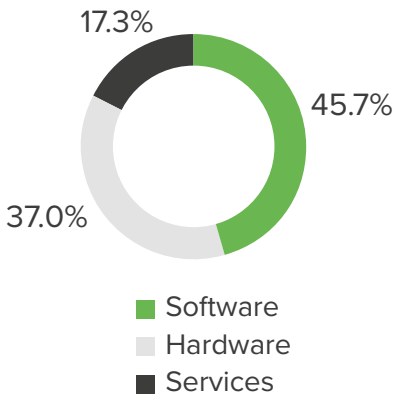
▼ Headwinds

Urban mobility shift
Transit and micro-mobility cut private car use.

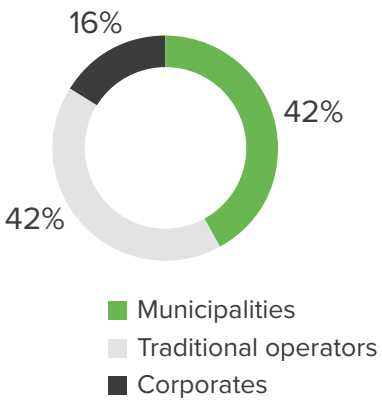
Hardware margin compression
SaaS shift squeezes pure-play hardware margins.

Data privacy
GDPR adds compliance complexity and cost.

Segment breakdown (2024 share)



End-user split (2024)



Smart parking market landscape[1]

Parking Infrastructure Owners & Operators

APCOA PARKING
CONTIPARK Interparking Group
GOLDBECK
INDIGO
PARK ONE EIN UNTERNEHMEN DER Q-PARK GRUPPE
Q-PARK

Digital Parking Platforms & Consumer Apps

Arrive
easyPARK Parking. Made easy.
Flowbird
ParkMobile
Parkopedia
RingGo
yellowbrick
YOUR PARKING SPACE.
JustPark
moby park
pango
Parclick
ParkBee
Parkster
pay by phone
zenpark
SMART PARKING

Parking Management Software, ANPR & Enforcement

ARIVO
evopark
BetterPark
fair parken
PARKEFFICIENT
PRM
Parkingeye
peter park
Peuka
Q-FREE
WEMOLO
WPS

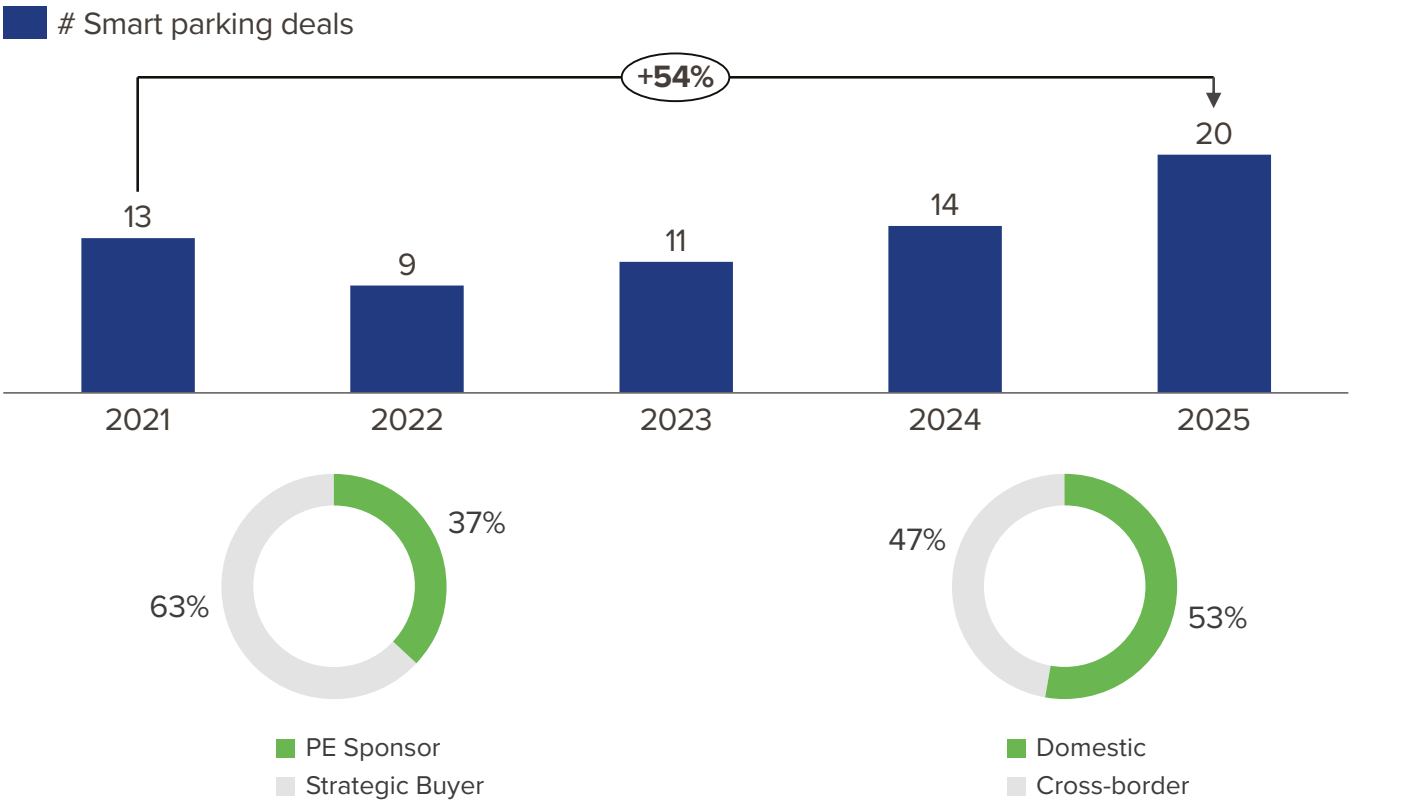
Parking Infrastructure Technology (Hardware, Access & IoT)

bebarmatic FIRST CLASS PARKING
BOSCH
CAME
Cleverciti A ParkHelp Company
DESIGNA
dormakaba
FEIG
fybr
GUNNEBO
JENOPTIK
libelium
nwave
SCHEIDT&BACHMANN
SIEMENS
SKIDATA
swarco
urbiotica

[1] Illustrative, not exhaustive

M&A market overview

Smart parking deal activity



Key M&A drivers in the smart parking environment

Platform consolidation

Operators and software vendors race to build end-to-end platforms spanning guidance, payments, enforcement and analytics.

Tech stack augmentation

Legacy operators acquire AI, computer vision and ANPR to modernize access control and defend customer relationships.

Adjacent vertical convergence

Access control, tolling, transit and EV charging providers acquire parking tech to secure recurring-revenue touchpoints in mobility.

Growing infrastructure capital allocation

Infrastructure funds and long-term capital target parking platforms for stable, inflation-linked cash flows, intensifying competition for assets.

Source: Mergermarket, S&P Capital IQ, Oaklins database

Selected European transactions

Date	Key Sector	Target	Deal description / Rationale	Acquirer / Investor
Pre-Launch[1]	Smart parking		An infrastructure investor is preparing the divestment of a market-leading provider of parking infrastructure operating a large network of facilities across Europe.	
Live-Deal[1]	Smart parking		A European technology provider specializing in digital parking management with an extensive network of managed locations is expected to come to market.	
Live-Deal[1]	Smart parking		A shareholder is preparing the sale of a European provider of integrated parking automation and access management solutions.	
Jul 2026	Smart parking	orikan	EQT has agreed to acquire Orikan, an Australian provider of integrated parking, enforcement, payments and compliance technology serving governments, universities and private operators across Australia, New Zealand and North America.	EQT
May 2026	Smart parking	amco Inspired Technologies	Halcyon Equity Partners has invested in AMCO, a Greek intelligent transport systems and smart parking solutions provider, to support international growth.	HALCYON EQUITY PARTNERS
Mar 2026	Smart parking	BigParking	JustPark, a UK digital parking marketplace backed by LLR Partners and FTV Capital, has acquired BigParking, a UK event parking operator with 120+ locations near major stadiums and venues.	JustPark
Jan 2026	Smart parking	iPark	CVC DIF, the infrastructure strategy of CVC Capital Partners, has acquired iPark, a leading Iberian off street parking infrastructure platform, from Elliott Investment Management.	CVC DIF
Dec 2025	Smart parking	Parkingeye	MML Capital's continuation fund assumed sole control of ParkingEye Limited, a UK parking management services provider, moving the asset from joint to sole control and supporting continued ownership of the ANPR-enabled parking platform.	MML
Nov 2025	Smart parking	Cleverciti A ParkHelp Company	Parkhelp, a Spanish parking detection solutions manufacturer, has acquired Cleverciti Systems, a German parking space search software company, providing an exit for EnBW New Ventures.	ParkHelp
Nov 2025	Smart parking	Interparking	AG Insurance and AG Real Estate syndicated a minority stake in Interparking to Northleaf, Hedera and TINC / Infravest, adding long-term infrastructure investors as co-shareholders in the leading European parking provider.	Northleaf Capital Partners

Further information available upon request

Source: Mergermarket, S&P Capital IQ, Oaklins database

Selected European transactions

Date	Key Sector	Target	Deal description / Rationale	Acquirer / Investor
Oct 2025	Smart parking	saba	Interparking completed the integration of Saba, a Spanish parking operator, creating a leading pan-European parking and mobility platform with over 2,000 car parks and c. 800,000 spaces across 16 countries.	Interparking
Sep 2025	Smart parking	ePARK	Assa Abloy, a Swedish global leader in access control solutions, has acquired ePARK, a Swedish app based smart parking services provider.	ASSA ABLOY
Jun 2025	Smart parking	peter park	Great Hill Partners acquired a majority stake in Peter Park System GmbH, a German digital parking management software company, with ARBANOVA Familienstiftung taking a minority stake.	Great Hill Partners
Jun 2025	Smart parking	BeMobile	EasyPark, a Swedish digital parking platform operator, has acquired Be-Mobile, a Belgian smart mobility platform provider covering parking, tolling and traffic management.	easyPark
May 2025	Smart parking	EYSA	Tikehau Capital, a French multi asset management firm, has acquired EYSA, a Spanish parking and mobility infrastructure operator managing parking lots, meters and digital mobility platforms.	Tikehau Capital
Feb 2025	Smart parking	Parkopedia	EasyPark acquired Parkopedia, a global provider of connected-car services and mobility data, to combine Parkopedia's in-car parking data capabilities with EasyPark's digital parking and payment platform.	easyPark
Feb 2025	Smart parking	Agena Group	Livingbridge acquired Agena Group from Sovereign Capital Partners, backing one of the UK's largest technology-enabled parking management groups, with services across car park operations, software, data insights, digital payments and access control.	Livingbridge

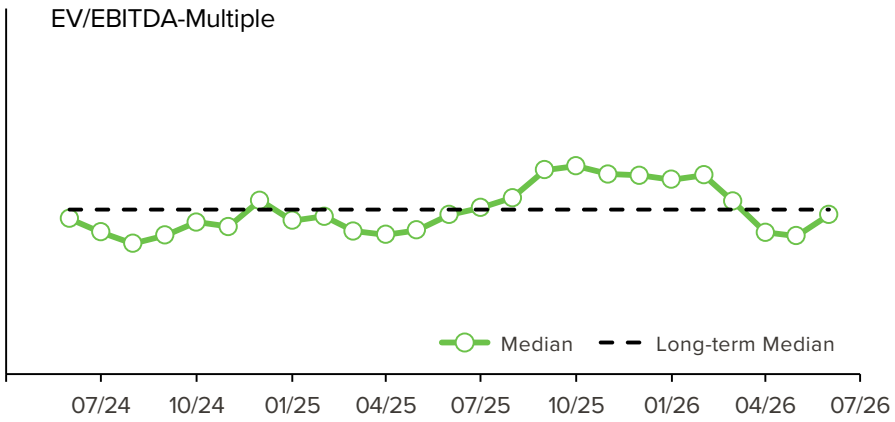
Commentary and Oaklins' view

European smart parking continues to see strong M&A activity across the value chain. Infrastructure investors are increasing their exposure, illustrated by CVC DIF's acquisition of iPark, the minority syndication in Interparking and several large-cap processes currently in preparation. At the same time, digital platform operators and private equity investors continue to consolidate the sector through technology-driven acquisitions, including Peter Park and Agena Group. With multiple live and pre-launch processes, transaction activity is expected to remain robust through 2027. The ongoing convergence of parking, access control and mobility solutions continues to broaden the strategic buyer universe.

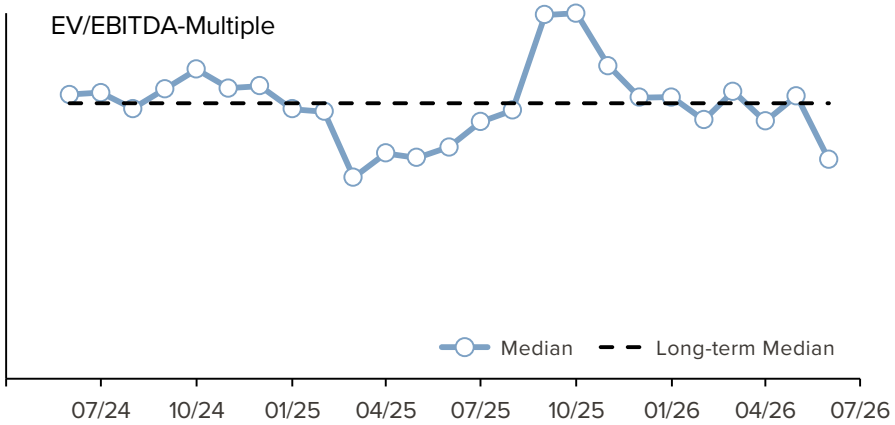
Source: Mergermarket, S&P Capital IQ, Oaklins database

Valuation landscape & sentiment

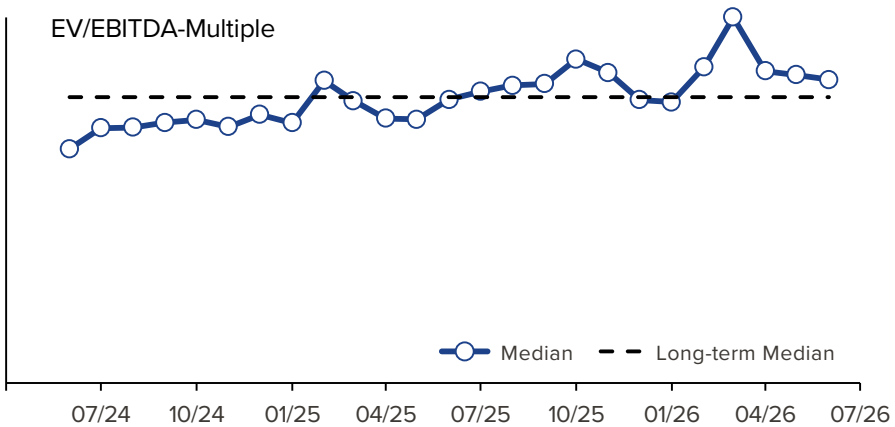
Hardware



Services



Software



Want to explore the valuation trends and what they mean for your business? Contact us and let's discuss.

Source: Mergermarket, S&P Capital IQ, Oaklins database

M&A advisor for smart parking

Oaklins advises clients across the smart parking value chain



ANPR-enabled

inflexion has acquired CREATIVE CAR PARK

M&A BUY-SIDE

Business Support Services/Private Equity

Parking SaaS

yourparkingspace has completed a growth capital fundraise PELICAN CAPITAL

FUNDING, DEBT ADVISORY & ECM

TMT

Parking asset operations

uniPark has acquired Citypark

M&A BUY-SIDE

Business Support Services

ANPR-enabled

CREATIVE PARKING SOLUTIONS has been acquired by ROCKPOOL INVESTMENTS

M&A SELL-SIDE

Business Support Services/Private Equity

Security & access control

LA BARRIÈRE AUTOMATIQUE LBA GROUP / AMCO LES ESCAMOTABLES LBA GROUP has completed an LBO alongside iXO PRIVATE EQUITY

M&A SELL-SIDE

Aerospace, Defense & Security/Construction & Engineering Services/Private Equity

ANPR-enabled

SURVISION LICENSE PLATE RECOGNITION has been acquired by its management alongside CAPITAL EXPORT

M&A SELL-SIDE

Private Equity/TMT



Case Study

Oaklins advised on three mandates involving Creative Car Park, a UK-based specialist parking management and enforcement company.





Across ownership changes, Creative Car Park found partners that supported the next phase of scaling, driving the expansion of its network of locations and the further development of its technology-based parking solutions.

Founded in 2005, Creative Car Park provides parking solutions to hospitals, supermarkets, retailers and private car parks. As a professional parking enforcement agency approved by the British Parking Association, it monitors car park usage and ensures only authorized users park on site.

Oaklins advised the private shareholders on the sale to Rockpool Investments, a UK-based private equity firm. A few years later, Oaklins advised Inflexion Private Equity, a leading UK mid-market private equity house, on the acquisition of the company from Rockpool.

In addition, Oaklins advised Inflexion on securing acquisition financing for this transaction.

CREATIVE PARKING SOLUTIONS

has been acquired by

ROCKPOOL INVESTMENTS

M&A SELL-SIDE

Business Support Services/Private Equity

inflexion

has acquired

CREATIVE CAR PARK

M&A BUY-SIDE

Business Support Services/Private Equity



Case Study

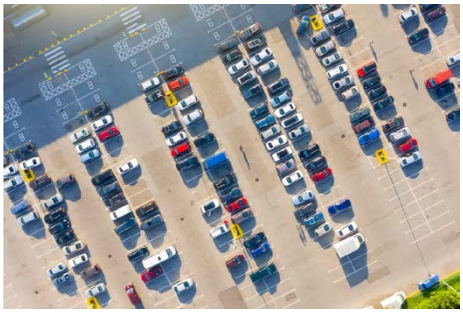
YourParkingSpace Limited (YPS) has completed a fundraising with Pelican Capital to finance further investment in its technology platform.

The growth financing for YourParkingSpace supports the expansion of its proprietary technology, accelerates commercial scaling and strengthens the company's position as a leading platform.

YPS operates an online parking marketplace for private individuals and commercial car park operators to rent out their unused parking facilities and driveways. Through its bespoke and state-of-the-art platform, YPS assists parking owners and managers to capitalize on their parking inventory as well as allowing individuals to locate vacant parking spaces in a real-time setting.

Oaklins assisted YPS's successful growth capital fundraise. During this process, the team initiated and advised on many aspects, from inception to completion, including deal structuring, pricing, legal negotiations and various due diligence workstreams.







Selected Oaklins credentials

Drawing on our deep smart infrastructure expertise, we support clients through complex challenges and drive successful outcomes. We are currently advising on multiple mandates in this industry.

Smart Infrastructure

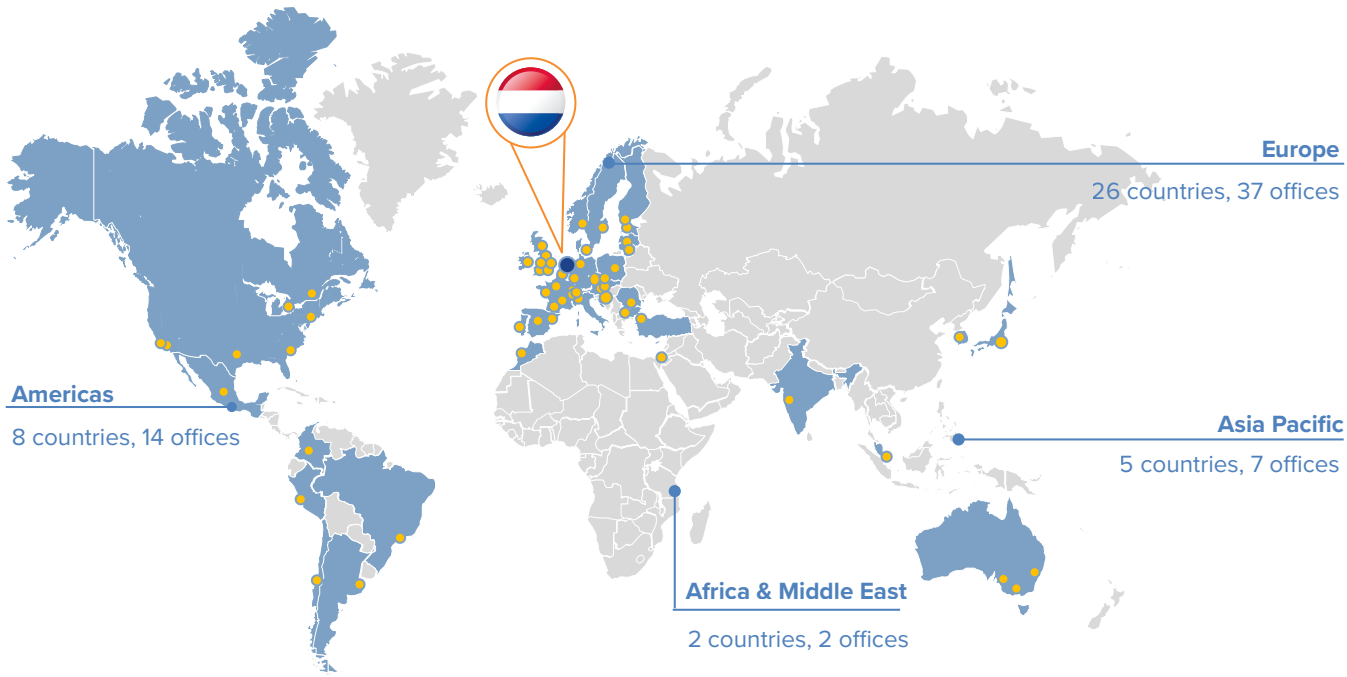
CARWISE & autodisk have been acquired by MAIN CAPITAL PARTNERS M&A SELL-SIDE Automotive/Private Equity/TMT	PLAIN VANILLA INVESTMENTS has sold its portfolio company Euphoria Mobility to Sofindev M&A SELL-SIDE Automotive/Private Equity/TMT	naxicap has sold its minority stake in Jri to IK Partners M&A SELL-SIDE Smart infrastructure	TOPIC has been acquired by technology & strategy GROUP M&A SELL-SIDE Smart infrastructure	
Devecto has been acquired by GOFORE M&A SELL-SIDE Smart infrastructure	Afinum has sold GARZ & FRICKE to SECO M&A SELL-SIDE Smart infrastructure	S3K has sold a 60% stake to HLD M&A SELL-SIDE Smart infrastructure	CIM.AS has been acquired by XANO M&A SELL-SIDE Smart infrastructure	
has completed an LBO alongside NextStageAM M&A SELL-SIDE Smart infrastructure	SMART ENERGY DECISIONS has been acquired by diversified COMMUNICATIONS M&A SELL-SIDE Smart infrastructure	PiGit has been acquired by ARCADEA GROUP M&A SELL-SIDE Smart infrastructure	Host has been acquired by banyan SOFTWARE M&A SELL-SIDE Smart infrastructure	
nfs has been acquired by KORBYT M&A SELL-SIDE Smart infrastructure	TSH and Beta Guard have been acquired by SMARTWATER GROUP M&A SELL-SIDE Smart infrastructure	CAPSOL has been acquired by ANGUS CAPITAL M&A SELL-SIDE Smart infrastructure	KIBO has been acquired by EMK Capital Enterprise Management Knowledge M&A SELL-SIDE Smart infrastructure	

*Selected transactions were executed by Oaklins professionals at other firms

Local roots, global commitment

OAKLINS BRINGS YOU OPPORTUNITIES FROM ACROSS THE WORLD AND WE MEET YOU WITH OUR EXPERTISE WHEREVER YOU ARE

Global reach with 60 offices in 41 countries



Oaklins is the leading international corporate finance house in the Netherlands

- Focus on engagements with a **cross-border element**
- Team of **60+** in the Netherlands
- Sweet spot transaction size is **€25m to €500m**

- Over **500** transactions closed
- Over **50%** of transactions involve **founder and family-owned** companies

- Dedicated global **niche specialists**
- Over **50%** of transactions involve **private equity**
- **147 transactions** closed in 2022–2026Q3

YOUR SMART PARKING & MOBILITY SOLUTIONS EXPERTS AT OAKLINS



Tijn Bastiaans
Partner
t.bastiaans@nl.oaklins.com
Tel: +31 622330146



Martijn de Win
Director
m.dewin@nl.oaklins.com
Tel: +31 619934831



Felix Stehr
Associate Director
f.stehr@de.oaklins.com
Tel: +49 152 09192953



Kevin J. Kambach
Senior Associate
k.kambach@de.oaklins.com
Tel: +49 15209192941

Oaklins Netherlands
Beethovenstraat 500
1082 PR Amsterdam

+ 31 (0)20 416 1303
info@nl.oaklins.com
www.oaklins.com

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