Summer 2026

Oaklins Germany Market Insights

Smart parking & mobility solutions

Market landscape & M&A update

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)

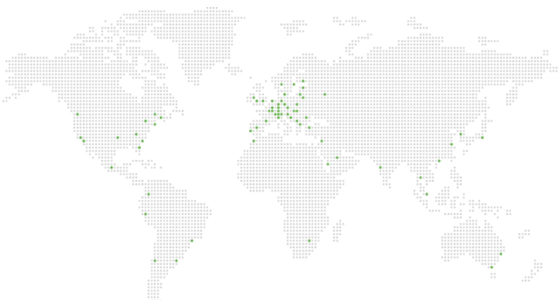
Houlihan Lokey	410
Oaklins	**404**
Rothschild & Co.	356
Goldman Sachs & Co.	224
Jefferies LLC	219
Morgan Stanley	215

Global footprint

900+
advisors

60+
offices

40
countries



Focus on dedicated industry groups

Agriculture	Aerospace & Defence	Automotive	Security & Safety	Construction & Engineering Services
Consumer & Retail	Energy	**Business Services**	Food & Beverage	Healthcare
Financial Services	Logistics	Private Equity	Industrial Machinery	TMT

Smart parking solutions

“Smart parking is moving beyond its hardware roots. Historically, the market centered on physical infrastructure such as gates, ticketing systems, meters and enforcement tools, with value driven by installation, maintenance and on-site services.

That foundation is no longer sufficient. The sector is shifting toward software, data and automation to manage access, payment, space utilization and user experience in real time. As operators and asset owners oversee more locations, user groups and mobility use cases, the challenge is no longer just controlling individual parking sites but managing a more connected and dynamic parking ecosystem.”

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Selected international parking experts

Our key coverage areas

- Parking Management Services
- Parking Access Control Systems
- Occupancy Detection & Smart Sensors
- Parking Guidance & Digital Signage
- Digital Payments & Commerce
- Data Analytics & AI Solutions
- EV Charging & Energy Management
- Mobility Integration Platforms

Executive summary

>$4.1bn	~18%	20
M&A Deals	Market growth	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 into curbside, EV and hub concepts
Links to EV charging, shared mobility, city logistics and P+R are gaining strategic relevance, moving parking toward integrated urban access.

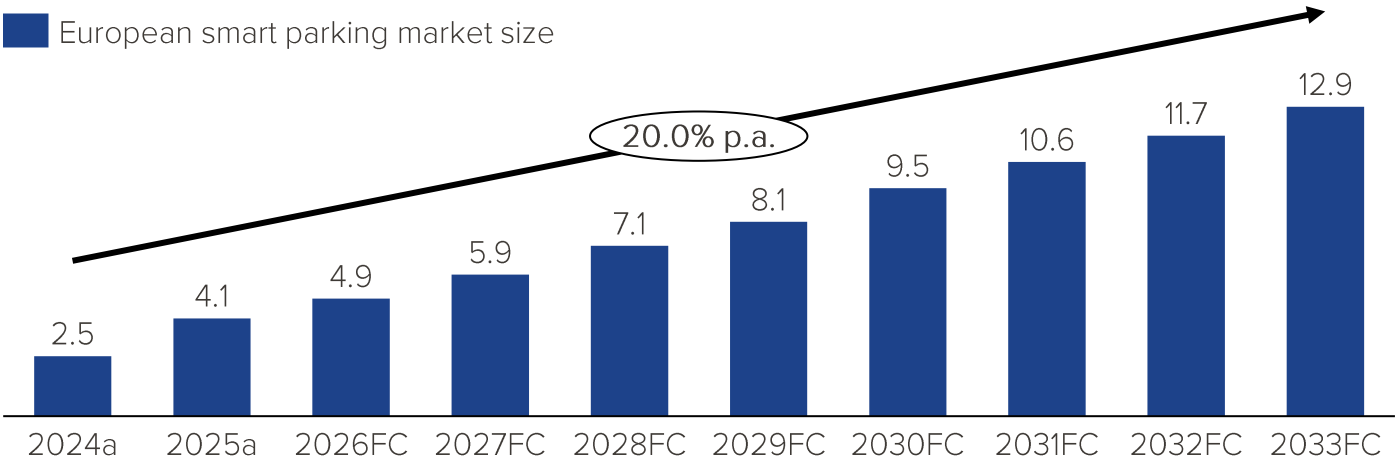
Growth outlook

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
Real-time data and scalable cloud demand.

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)

- Software – 45.7%
- Hardware – 37.0%
- Services – 17.3%

End-user split (2024)

- Municipalities – 42%
- Traditional ops – 42%
- Corporates – 16%

Source: Yahoo finance, Mordor Intelligence, GlobeNewswire

Smart parking market landscape[1]

Parking Infrastructure Owners & Operators

- APCOA PARKING
- CONTIPARK – InterparkingGroup
- 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

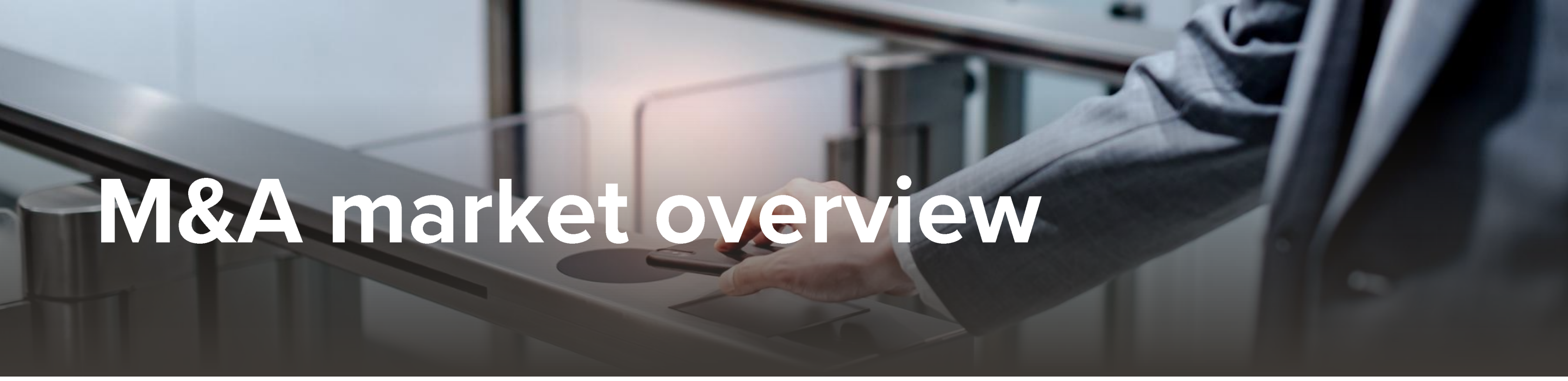
Parking Management Software, ANPR & Enforcement

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

Parking Infrastructure Technology (Hardware, Access & IoT)

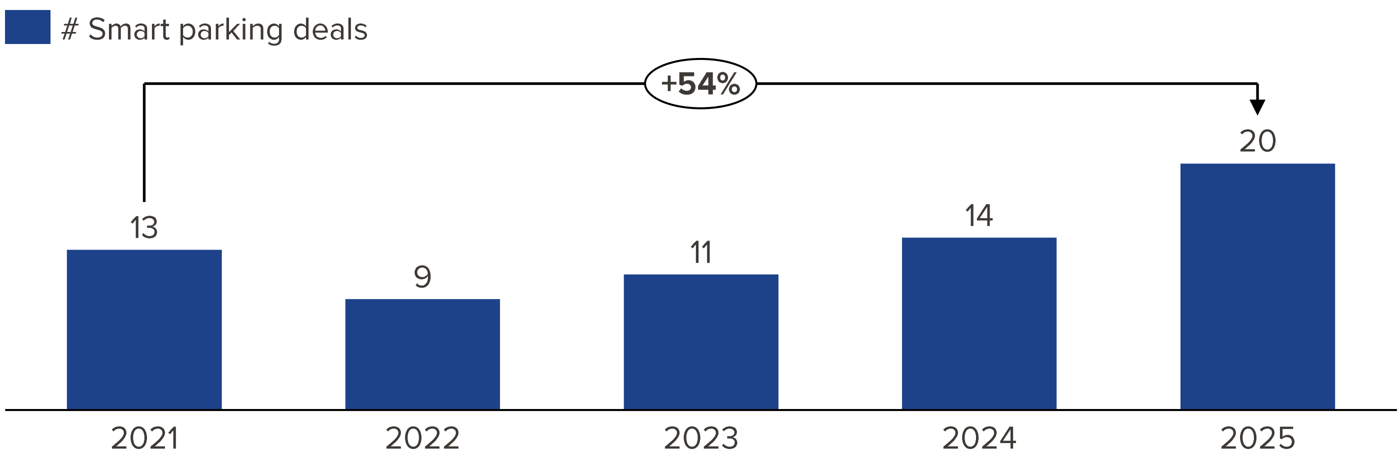
- bebarmatic – FIRST CLASS PARKING
- BOSCH
- CAME
- Cleverciti – A ParkHelp Company
- DESIGNA
- dormakaba
- FEIG
- fybr
- GUNNEBO
- JENOPTIK
- SIEMENS
- libelium
- nwave
- SCHEIDT&BACHMANN
- SKIDATA
- swarco
- urbiotica

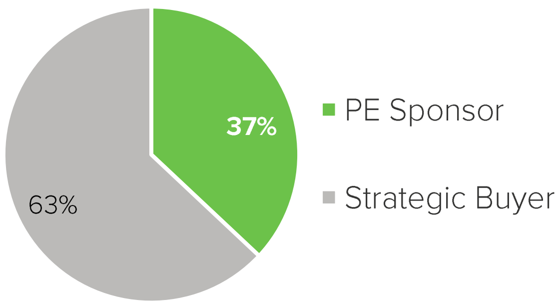
Note(s): 1) Illustrative, not exhaustive

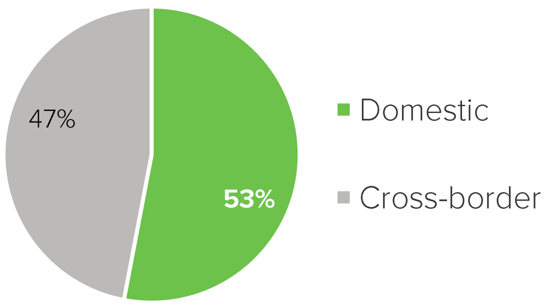


M&A market overview

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 players buy 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	e PARK	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	BE-MOBILE	EasyPark, a Swedish digital parking platform operator, has acquired Be-Mobile, a Belgian smart mobility platform provider covering parking, tolling and traffic management.	easyPark By Arrive
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 By Arrive
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

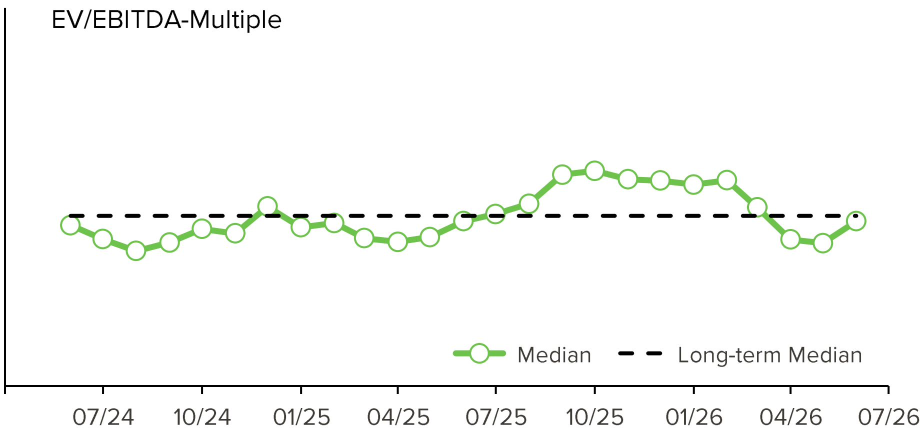
Commentary and Oaklins' view

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.

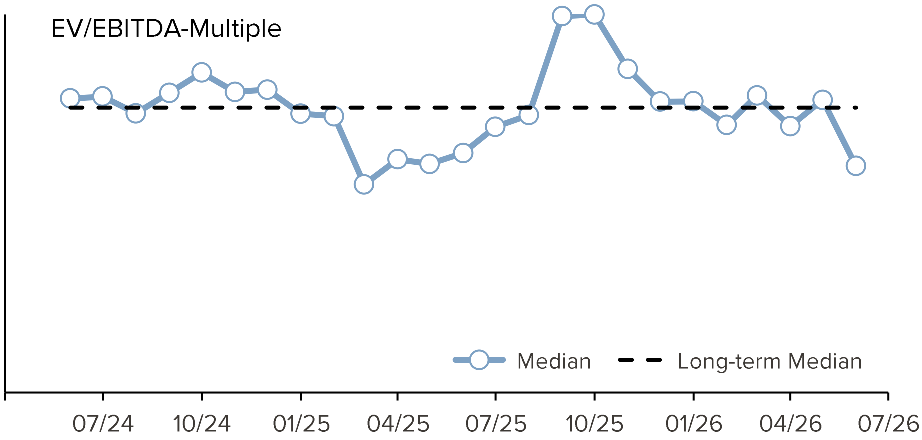
Source: Mergermarket, S&P Capital IQ, Oaklins database

Valuation landscape & sentiment

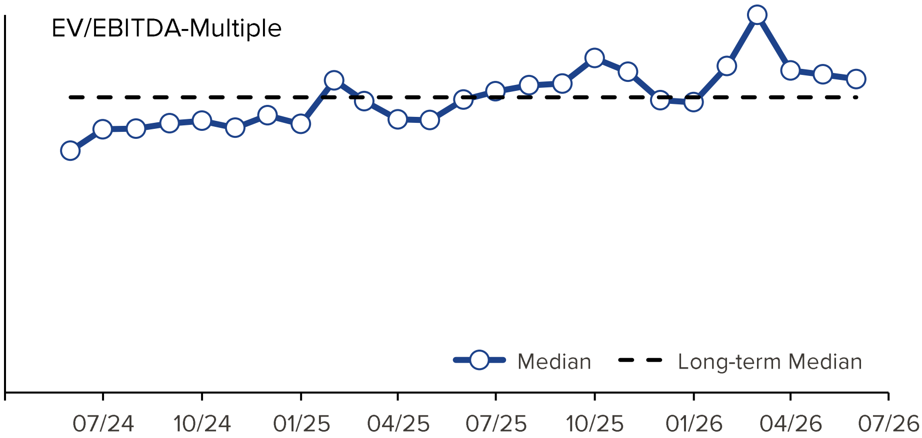
Hardware



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
US$6.5m
FUNDING, DEBT ADVISORY & ECM
TMT

Parking lot maintenance

Prophet Equity
Seeing Future Value Today
has sold
ACE ASPHALT
to Huron Capital-backed
SUNLAND ASPHALT
M&A SELL-SIDE
Business Support Services/Construction & Engineering Services/Private Equity

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
AMCO LES ESCAMOTABLES
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.

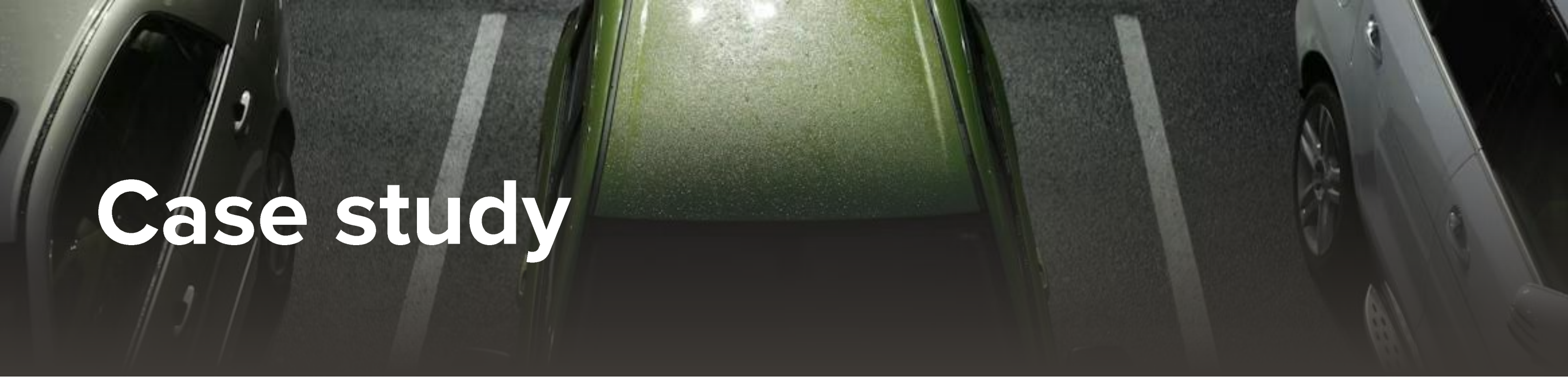
Created in 2005, Creative Car Park provides parking solutions to hospitals, supermarkets, retailers and private car parks. As a professional parking enforcement agency approved by the British Parking Association, it monitors car park usage and ensures only authorized users park on site.

Oaklins advised the private shareholders on the sale to Rockpool Investments, a UK-based private equity firm. 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 aquisition financing for this transaction.

Inflexion
has acquired
Creative Car Park
M&A BUY-SIDE
Business Support Services/Private Equity

Creative Parking Solutions
has been acquired by
Rockpool Investments
M&A SELL-SIDE
Business Support Services/Private Equity

Inflexion
has secured a debt facility
Creative Car Park
FUNDING, DEBT ADVISORY & ECM
Private Equity/TMT



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
US$23.7m
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
NextStage AM
M&A SELL-SIDE
Smart infrastructure

SMART ENERGY DECISIONS
has been acquired by
diversified COMMUNICATIONS
M&A SELL-SIDE
Smart infrastructure

PICIT
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 TAG SECURITY HOLDINGS 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

Your ideal partner

We strive for excellence and deliver premium value for you.

In-depth M&A expertise and track record

As the oldest M&A advisory firm in Germany, Oaklins can look back on many years of experience and has successfully supported over 1,500 mandates, particularly from family businesses. This extensive expertise ensures a professional and highly meticulous execution of your transactions.

International reach as your competitive advantage

Through Oaklins' global organization, we can address buyers in all regions directly in their native language. This global presence significantly enhances your sales opportunities and allows us to identify the optimal buyer for your business.

Extensive industry expertise and a strong network

Our teams possess extensive industry expertise and have direct access to relevant national and international buyers, enabling them to execute transactions efficiently and discreetly.

Pronounced industry expertise and strong networking

Our deal team has in-depth industry knowledge and a strong network. With direct access to national and international buyers, we can conduct your transaction discreetly and successfully. Our connections to leading companies and investors enable us to find the ideal buyer for your business.

Focus on SMEs
Transaction volumes ranging from EUR 20m to EUR 500m

Industry expertise
Specialization in 15 industry groups and additional subsectors

Experience
Over 7,000 completed transactions and more than 600 active mandates

In business for more than 40 years
Oaklins was founded in 1985 and currently has more than 60 offices in 40+ countries

Local roots, global commitment

Oaklins brings you opportunities from across the world and we meet you with our expertise wherever you are

YOUR SMART PARKING & MOBILITY SOLUTIONS EXPERTS AT OAKLINS GERMANY

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