Arriva
in focus
Annual highlights
Welcome

Our 2018 annual highlights

Welcome to Arriva in focus, a review of our key successes throughout 2018 for our customers, our stakeholders and our employees.

2018 was a good solid year for Arriva. We continued to build on our strong foundation as an international transport operator, investing €326m to help us deliver the safe, sustainable and affordable mobility solutions our customers want to see.

Our excellent track record in delivery helped us to retain and secure several crucial contracts in Poland, Serbia and Sweden, and ensure we were re-awarded the only rail contract put out to tender in Denmark.

Our customers have asked more from us and we’ve responded with new products and services to meet their aspirations and demands. This includes introducing a 24-hour weekend rail service in London, growing our bike scheme in Slovakia and introducing new eco-friendly vehicles from Sweden to Italy, and from Portugal to Slovenia.

Key to delivering value and the best transport solutions for our customers throughout 2018 have been our employees. Our graduate scheme, apprenticeship programme and internal career pathways have helped our people to grow as we develop the next generation of leaders.

We want to build on our strong foundation and develop in our existing markets to build an even bigger and better Arriva.

Our employees. Our graduate scheme, apprenticeship programme and internal career pathways have helped our people to grow as we develop the next generation of leaders.

We also want to grow in new markets and have signed a partnership agreement with the association of French regions, Régions de France, as the French rail market opens to competition.

Our vision is to become the mobility partner of choice. To achieve this we must focus on continuing to improve our existing businesses, attract and nurture the very best employees, and help our clients shape the future of transport.

Whatever their mobility needs, we want our customers to choose Arriva.

Manfred Rudhart
Arriva Group CEO

Small beginnings

Arriva is one of the leading providers of passenger transport in Europe, employing over 53,000 people and delivering two billion passenger journeys across 14 European countries each year.

Arriva was acquired by Deutsche Bahn (DB) in 2010, one of the world’s leading passenger and logistics companies, and is responsible for its regional passenger transport services outside Germany.

Our journey began in 1938 when the Cowie family opened a second-hand motorcycle shop in Sunderland – the first chapter in an incredible story that would see us grow to become a pan-European operator.

Today we believe our passenger transport experience in Europe is unrivalled, delivering solutions for local and national authorities, tendering bodies and health care commissioners.
We have a wealth of experience of different transport markets.

Our scale and expertise mean that we can operate a range of transport modes across our group.

1,083 trains
17,049 buses and coaches
350 bikes
485 car-share cars
4 water buses
223 non-emergency patient transport vehicles

We pursue growth opportunities where we believe we can add real value for our customers.

investment (gross capex) revenue ebitda
€326m €5.4bn €575m

We operate in 14 countries:
- Czech Republic
- Croatia
- Denmark
- Hungary
- Italy
- The Netherlands
- Poland
- Portugal
- Serbia
- Slovakia
- Slovenia
- Spain
- Sweden
- UK
We want Arriva to be a place where people enjoy working, in an environment in which they can grow and develop a successful career.

Together we are One Arriva; a team that delivers value and the best solutions.

Building for the future
Developing talent

We aim to attract, retain and develop high potential within Arriva to enable our future success. This year, we’ve designed and developed our programmes towards this ambition.

International Graduate Programme
This 18-month programme – in Operations, Engineering and Support Functions – provides graduates with learning and support to become future Arriva leaders. As an international organisation, we offer unrivalled opportunities to develop skills across our businesses and borders.
We’ve created new goals, guidance and targets to track the progress of graduate talent.

Lift-Off For Leadership
We’ve developed a Lift-Off For Leadership programme for 2019. It’s for those at the early stages of their careers who demonstrate strong performance and high potential.
People who have been nominated will be given opportunities to build their leadership capabilities and broaden their exposure to the Arriva Group. Participants will shadow senior managers across the business, get involved in business decision making and fast track towards becoming our future leaders.

Onwards and upwards
“I joined the graduate scheme because I wanted to be involved in exciting new public transport trends. It gave me the chance to work in different countries, such as Italy, and understand how other Arriva businesses and departments operate and fit together.
I’m currently in London as technical lead on a fuel efficiency project.

Being nominated for Lift-Off For Leadership provides a great opportunity to learn from senior Arriva managers and grow my skill set to become a successful leader.”

Murtaza Abbasi-Shamsi, Product Manager for Driving Arriva Telematics (DAT)

27 graduates completed in 2018
38 new graduate trainees joined
14 new graduates are women
The commitment made by our people during the Beast from the East was incredible, as witnessed by direct feedback from customers.”

Chris Burchell,
Managing Director, UK Trains
The Night Overground service, operated by Arriva Rail London (ARL) on behalf of Transport for London (TfL), is successfully helping to keep London moving 24/7. The service, which operates between Highbury & Islington and New Cross Gate, is a huge benefit for local businesses. It’s also boosting the already booming night-time economy in east London, creating new opportunities for theatres, live music venues and restaurants.

People going to work for a night shift or returning home after a late evening out can now travel more easily, safely and quickly. The service runs every 15 minutes during Friday and Saturday nights, into the early hours of Saturday and Sunday mornings.

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"Bike sharing complements public transport to get people to where they want to go, with more freedom to travel on their own terms."

László Ivan, Managing Director, Arriva Slovakia

Bike sharing schemes are often associated with large cities, such as London and Berlin, though many smaller cities now enjoy the benefits too. ArrivaBike is a great way to connect people and places easily, especially on short journeys.

We’ve now also been awarded two tenders by the Kia Foundation (owned by Kia Motors Slovakia) for the infrastructure and operations of BikeKIA in Žilina in the north west. BikeKIA registrations opened in February 2019 and we predict the scheme will be a big hit, especially with Žilina’s large student population.

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Bike sharing, Slovakia

Being able to offer partners an innovative multi-modal scheme adds value and gives us competitive advantage. Arriva Slovakia has already seen great success with ArrivaBike in Nitra: the number of rentals has risen from 8,500 last year to 24,000 this year, with 75% of rentals by local people.

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David Thomas, Head of Concession for London Overground, TfL

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The future of transport lies in developing more personalised journeys. We aim to improve passengers’ digital and physical journeys for an easy and connected travel experience.

Nearly 11 million people in the UK have some form of disability, so our services should be accessible for all. We helped develop Signly, a smartphone app that supports our deaf and hard of hearing passengers on Arriva Rail London through pre-recorded sign language videos.

Bus passengers have come to expect contactless payment. It removes the hassle of paying, cuts boarding times and speeds up journeys. Following a successful trial, the service will be rolled out across our bus network in 2019.

“ArrivaClick is a brilliant way to get around Liverpool, giving you the convenience of a taxi without paying for one.”

Vicky, shop owner, Liverpool

As a result of ArrivaClick’s successful launch in Kent in 2017, Liverpool is one of the first cities to introduce this innovative app-based transport solution.

ArrivaClick offers the convenience of a personalised shared bus journey – providing a corner-to-corner service that takes passengers where they want, when they want.

The shortest and fastest routes are calculated, with guaranteed fares and real-time pick-up and drop-off information.

ArrivaClick is a cashless service that’s ordered using a smartphone app. Passengers travel in style, with free Wi-Fi, charging points, wheelchair space, tables and leather seats.

The Beatles might call this a magical tour – without any mystery.

“We are the obvious choice for our customers who we know and understand well.”

Paul O’Neil, Managing Director, UK Bus
We’re proud to run a business that’s renowned for looking after its passengers, employees and the environment.

We have a strong foundation on which we’ll continue to expand: improving efficiencies and reducing costs, yet never compromising on safety.

A breath of fresh air
Eco buses

With transport playing a major role in the quality of the air we breathe, reducing pollution – as well as congestion – is important to us.

Staying young, Italy
Eco-friendly buses improve the air around us and encourage people to use their cars less – they are also an opportunity to breathe new life into fleets.

As a partner in a Joint Venture, Arriva invested in 33 new Euro Six buses in Trieste, making the fleet in the city the youngest and least polluting in all of Italy. They feature a sophisticated passenger counting system and video surveillance cameras for extra peace of mind.

The talk of the town, Slovenia
Following a successful trial, Arriva Slovenia launched its very first electric bus in the seaside town of Koper – a sustainable municipality that’s keen to reduce road traffic. The eco-electric minibus has solar panels and can carry up to 27 locals and tourists.

Eco buses

Rooted in local communities
Our corporate social responsibilities

Although Arriva is a pan-European group, we’re still a local company at heart in the markets in which we operate.

Staying on top, Netherlands
Arriva Netherlands is now on step one of the TNO Social Enterprise Performance Ladder, a nationally recognised measurement of an employer’s efforts towards social responsibility and inclusiveness.

Arriva Netherlands employs 231 disadvantaged people who’d experienced various barriers to work, and supports them to stay in work. This includes 75 people hired in 2018 to ‘learn and work’ on a vocational scheme (BBL) to qualify as bus drivers in just one year.

Community spirit, UK
When Ivy Woolcock, a Kent resident, turned 107, Arriva named a bus in her honour. Ivy cut the ribbon with the local mayor, and a plaque in her honour was put up by a priority seat. The Northfleet depot management team then accompanied her on an afternoon tea celebration.

“In Italy, Trieste is the city with the lowest impact on the environment from public transport, thanks to continuous renewal of the Trieste Trasporti fleet.”

Massimiliano Fedriga, Governor of the Friuli Venezia-Giulia region

“In Ivy’s lived here for over 90 years; we thought this was a nice way to celebrate such a long-standing customer.”

Darren Bow, Operations Manager, Northfleet depot
Arriva switched its electricity supplier to SSE Business Energy to supply its depots and offices in the UK with green electricity that’s fully backed by Renewable Electricity Guarantee of Origins*.

Our sites can also access SSE’s online energy monitoring portal to check consumption and follow energy-saving practices.

The volume of carbon we save each year is the same as that used by an average car driving over 95 million miles – or equal to powering around 25,000 homes with green electricity.

The initiative is part of our Europe-wide ‘Destination Green’ programme. It’s yet another way in which we’re reducing our environmental impact.

“Destination Green demonstrates that Arriva is at the forefront of efforts to reduce carbon, both by encouraging more people to use public transport and by minimising its own environmental impact.”

Claire Haigh, Chief Executive, Greener Journeys

“Ensuring a smooth and safe journey is one of our main goals every day.”

Jose Luis Sotos Belinchón, Driver, Arriva Spain

“Improving our existing business will create the platform to enable growth.”

Jana Siber, Managing Director, Mainland Europe – Emerging Markets

Getting the green light
Renewable electricity, UK

Driving standards even higher
Driving Arriva

Small changes mean a big difference
Driving Arriva is a group-wide project which focuses on the way our buses and trains are driven. It guides our 36,600 drivers to be the very best they can be to improve the journey experience.

Making small changes in driving behaviour and planning ahead can result in big improvements in punctuality and passenger comfort, and help reduce emissions and fuel consumption. Less wear and tear on vehicles also means they’re less likely to break down which, in turn, means a more reliable service.

Achieving best practice
We’re creating a blueprint across the whole of Arriva for a single, best way of driving that ensures consistency.

Measuring driving data, giving individual feedback and supporting drivers with coaching and training add up to help them make better decisions every single second of every single journey.
We have an excellent record of growth across Europe. Our reputation is based on creating sustainable relationships with our clients, and by providing greener, more integrated and affordable transport solutions.

We will continue to deliver above and beyond for authorities and passengers.

The winner takes it all
Contract wins, Sweden

Arriva Sweden has operated transport services for 20 years, with successful growth down to a commitment to delivering what passengers and clients want.

Our competitive wins in 2018 weren’t just due to price but also our innovative bus portal, delivering seamless logistics and high service levels across the entire workforce – from cleaners to engineers.

We won a contract to operate bus services in Helsingborg, including 13 electric buses on the Bus Rapid Transit (BRT) system.

The Passenger Transport Authority in Stockholm renewed its contract to run fossil-free fuel buses in Ekerö. The municipality has offered to build a bus lane to encourage car drivers to use the bus instead. As the islands are remote in places, our bid also included a proposal for Demand Responsive Transport.

“Customers and clients will choose mobility solutions that are affordable and meet their needs.”
— Alison O’Connor, Director, Corporate Affairs

Delivering time after time after time
Rail contract, Denmark

For the third time running, we’ve secured our contract with the Danish Ministry of Transport to operate Denmark’s only rail network put out to competitive tender.

We have 15 years’ experience running rail services in Denmark and this new third contract, which starts in 2020, will continue our strong partnership through to 2028 with the option of a two-year extension.

By contracting out to us, the Danish government has already enjoyed savings of €40.2m during the first period alone (2003–2010) – and we’ve identified potential further savings in the pipeline.

But ensuring growth isn’t just about numbers. It’s about service and satisfaction too, as demonstrated by Arriva Denmark being awarded the ‘Passenger Pulse’ prize by the Danish Consumer Council for a first-class telephone customer service.

“During the first two contract periods, we have received both cheaper and more punctual rail services with a high level of service for passengers.”
— Ole Birk Olesen, Minister for Transport, Building and Housing in Denmark

“99% punctuality score in 2018
20 more trains to be added
13% market share as of 2020

Arriva in focus
Winning in Warsaw
Warsaw Passenger Transport Authority awarded Arriva Poland a new eight-year contract, following a competitive tender.

With only 30% of urban bus services in Poland put out to competitive tender, Arriva is held in high regard as one of the country’s leading private bus operators.

Success in Serbia
Arriva Serbia has operated buses in Kragujevac since 2015 – and will continue to do so thanks to our ability to meet and surpass client expectations.

Winning the expanded contract this year means we now cover 50% of the transport market in Serbia’s fourth largest city.

“Powering ahead
Contract wins, Denmark
With Arriva Denmark growing its footprint in Copenhagen, getting around is easier and greener than ever.

The water bus tender has been won for the third time in a row and is contracted to run for 10 years from January 2020. The bid included new, sustainable, zero emission boats which are powered by electricity and quieter to run.

These spacious water buses, operated by Arriva on behalf of Movia, will have room for 80 passengers, four wheelchairs and eight bikes.

425,000 passengers a year use the harbour bus

82,000 registered DriveNow customers

Our DriveNow car-sharing scheme has increased capacity and uptake by adding new cars to its fleet. A car can usually be found within walking distance and is available at the click of a button.

DriveNow is suitable for both short and long distance journeys, without any of the hassle or cost associated with owning a car.

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34 new buses

3 year contract

6 new routes

€32m contract

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“Our clients look for a trusted transport partner and we’ve proven time and again that we’re able to deliver on their expectations.”

Liz Benison, Managing Director, Mainland Europe – Developing Markets
Our year: 2018

January
Making connections
Commenced five-year contract to operate 31 red London buses on the 141 route

February
All right on the night
Expanded our Night Overground service to keep London moving 24/7

March
Battled against the Beast from the East
Arriva employees went the extra mile to keep UK rail and bus services running

April
The winner takes it all in Sweden
Winning formula led to tender win in Helsingborg to operate the city’s bus network

May
Getting the green light in the UK
Became the first major private transport operator to switch to a 100% renewable electricity supply

June
Powering ahead
Won tender to introduce zero emission water buses to Copenhagen harbour

July
Success in Serbia
Won contract to operate bus services in Kragujevac, Serbia’s fourth largest city

August
No need for a ticket to ride
Won tender to operate bus services in Kragujevac, Serbia’s fourth largest city

September
An eye on new markets
Ariva signs agreement with Régions de France to assist French rail reforms

October
Building for the future
Welcomed 38 new graduates to our 18-month programme

November
Delivering in Denmark
Won major tender to operate rail services in Jutland for the third consecutive time

December
Winning in Warsaw
Introduced state-of-the-art new buses in Poland