

Waterbus
Responsible
Flexible approach
Working together
Customer focused
Sharing the journey
Responsible
Integrated transport
Strategic adviser
Rewarding careers
Trusted partner
Light rail
Waterbus
Coach
Tram
Rail

Bus
Trains
Coach
Light rail

Innovation Integrated transport
Unrivalled knowledge Strategic adviser Committed
Transport solutions Accessible
Rail Share best practice Resilient Public transport Rail Integrity
Talented people Operational excellence
Working together Rewarding careers Innovation
Motivated Continuous improvement Light rail
Integrity Resilient Working together
Innovation Integrity Add value Bus
Proven track record Committed Responsible Public transport
Light rail
Waterbus
Coach
Tram
Rail

Contents | Welcome from the chief executive | Who we are | What we do |
How we work | Our stakeholders | Our business | Arriva UK Bus | Arriva UK Trains |
Arriva Mainland Europe | Corporate responsibility

Arriva is one of the largest providers of passenger transport in Europe. Our buses, trains and trams provide more than 1.5 billion passenger journeys every year. We deliver transport solutions for local and national authorities and tendering bodies. For communities and the users of public transport we offer transport choice and the opportunity to travel.

Contents	1
Welcome from the chief executive	2
Who we are	4
What we do	7
How we work	10
Our stakeholders	12
Our business	14
Arriva UK Bus	16
Arriva UK Trains	22
Arriva Mainland Europe	28
Corporate responsibility	48
Our approach	48
Safety	49
Employees	52
Environment	56
Community	60

Vítejte
Velkommen
 Welkom
 Herzlich willkommen
 Witajcie
 Üdvözöljük
 Benvenuti
Welcome
Bem-vindo
 Vitajte
 Bienvenidos
 Välkommen
 Merhba

Arriva has a proven track record of delivering on our commitments. That principle is why we retain so many of our contracts, why we are a valued and trusted partner, and why people enjoy fulfilling and rewarding careers with us.

Arriva is on a journey of continuous improvement. We are close to our markets and this enables us to predict and respond quickly to change including complex legislative requirements and increasingly high customer expectations.

Our healthy approach to embracing change and commitment to improvement has helped build a resilient business which positions us well for an exciting future.

This resilience has also served us well against a backdrop of an uncertain economic environment. It provides the platform from which we can pursue opportunities presented by changing times to further expand our leading market positions and enter new markets.

There are a significant number of growth opportunities for Arriva, from buying a small business or running transport for local health services, to managing major transport contracts.

Arriva also has a significant role to play in supporting transport authorities as they move towards competitive tendering. We help shape the local transport markets of the future by offering innovative, customised solutions.

We are part of Deutsche Bahn, one of the world's leading passenger transport and logistics service providers. That backing brings a wealth of international transport expertise, along with access to capital for development and investment.

Our breadth of experience in different transport markets is arguably unsurpassed in Europe. We operate a wide range of contracts across different

modes of transport, in different geographic and regulatory environments. That experience enables us to enter markets new to Arriva, whether by mode or location, across Europe and potentially beyond.

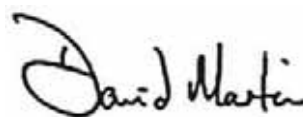
To our clients, we are a valued, trusted partner and strategic adviser, and we share the same key drivers: efficiency, reliability, value for money and customer service. We set the standards for quality and customer satisfaction in our markets with many of our businesses proudly reporting record breaking satisfaction levels.

To our passengers, we are the local operator that helps ensure their day's activities go to plan. We are customer orientated and do everything we can to help each of our customers reach their destinations safely, easily and on time.

We have an engaged workforce driving our success, and our reputation enables us to appoint and retain talented management and top quality professionals.

This brochure will give you a glimpse into our business.

If you want to take a fulfilling, worthwhile journey, share yours with us.



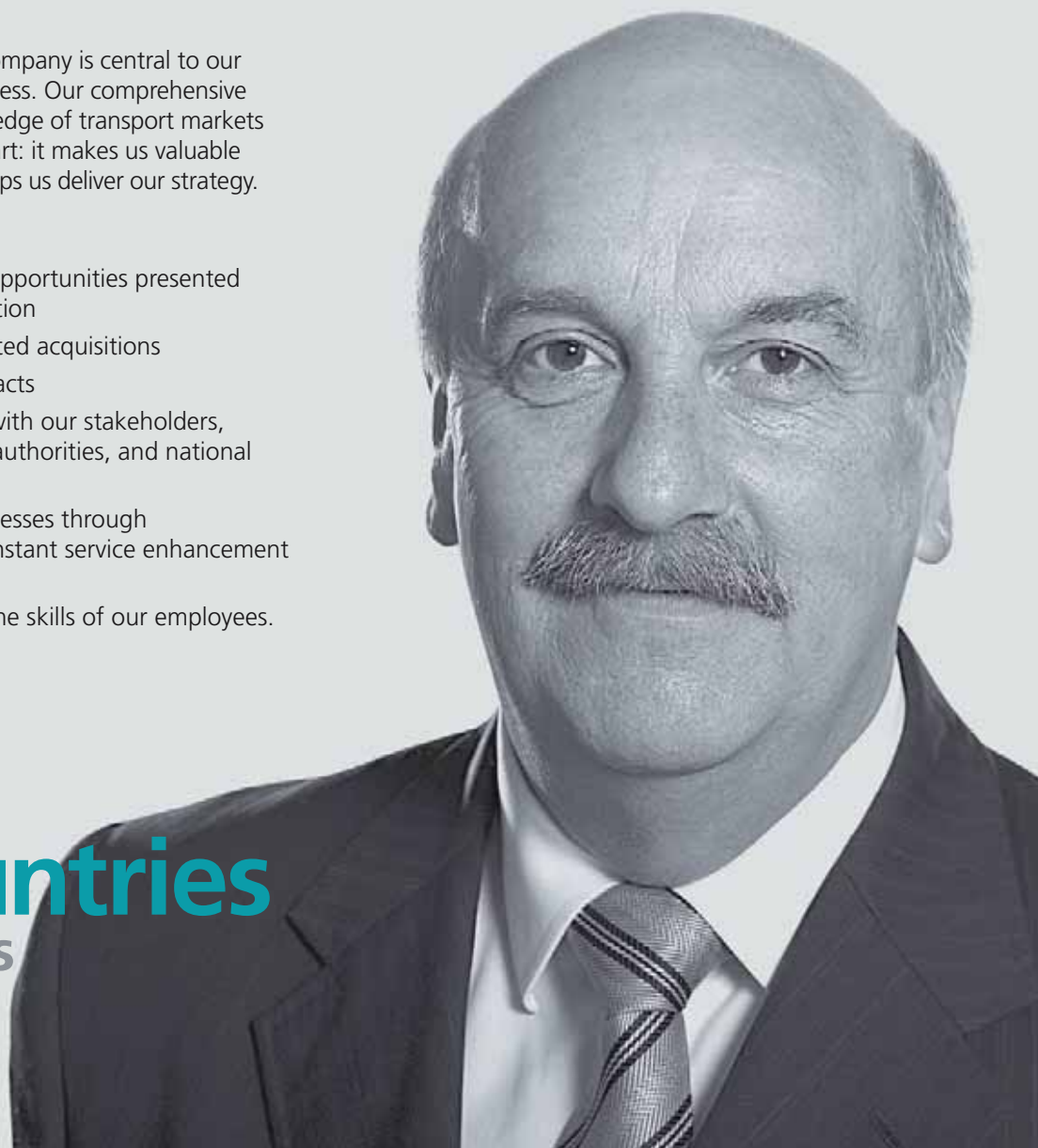
David Martin
Chief executive

Strategy

The sustainable growth of our company is central to our work and the future of our business. Our comprehensive experience and unrivalled knowledge of transport markets across Europe is what sets us apart: it makes us valuable to clients and passengers, and helps us deliver our strategy.

Our strategy is to focus on:

- **capitalising** on the growth opportunities presented by transport market liberalisation
- **investing** selectively in targeted acquisitions
- **winning** and retaining contracts
- **building** close partnerships with our stakeholders, including contract-awarding authorities, and national and local governments
- **improving** our existing businesses through best-practice governance, constant service enhancement and innovation
- **respecting** and developing the skills of our employees.



3 divisions

12 countries

16,000+ buses

600+ train sets

100+ trams

47,500+

employees

1.5 billion+ passenger
journeys every year

...and still growing

Arriva's roots are in Sunderland in the UK, where we still have our head office. Back in 1938 the Cowie family opened a second-hand motorcycle shop in Sunderland - the first venture by what has grown to be an international business trading across Europe.



We entered the UK public transport market in 1980, and became the country's second largest bus company in 1996. We began our journey in the mainland European bus market in 1997 with an acquisition in Denmark. We entered the mainland European rail market in 1999 in the Netherlands, and the UK rail market in 2000.

We are now established as one of the leading passenger transport operators in Europe. We provide bus and train operations in the UK, Denmark, the Netherlands, Portugal and Sweden. We run train operations in Poland and bus operations in the Czech Republic, Hungary, Italy, Slovakia, Spain and most recently in Malta.

In 2010 we were acquired by Deutsche Bahn of Germany and subsequently sold our German operations, which we had grown to a £400 million turnover business over five years.

Introducing our parent company



Deutsche Bahn AG is a leading worldwide provider of transport and logistics services.

Based in Berlin, Deutsche Bahn was founded in 1994. Today, it operates in more than 130 countries worldwide and employs some 291,000 people in more than 300 different occupations.

Deutsche Bahn's mission statement is to be a customer-orientated, likeable, resource-saving and economically successful company.

DB Bahn is a leading provider in the European passenger transport market, delivering:

- regional, urban and long distance passenger transport across Europe
- 4.2 billion passenger journeys a year.

DB Netze operates the biggest rail network in Europe, managing:

- 5,700 train stations
- 64,000 km total track length.



DB Schenker is the second biggest worldwide provider of transport and logistics services, delivering:

- 415 million tonnes of freight shipped via rail each year, in addition to air and sea freight
- 81 million shipments sent via European land transport each year.

Vision

Deutsche Bahn's vision is to expand its leading market positions to become the world's leading mobility and logistics company, by offering innovative solutions, focusing on intelligent integration and setting the standards for quality and customer service in its markets.

Arriva's role

As a division of DB Bahn, Arriva is responsible for the growth and development of all Deutsche Bahn's regional passenger transport outside of Germany.

Arriva – Key recent events

2011 ➔ **Begins a 10-year contract to operate bus services in Malta (right)**

- ➔ Arriva's German operations are sold, completing the undertakings given to the European Commission by Deutsche Bahn on its acquisition of Arriva



2010 ➔ Is acquired by Deutsche Bahn of Germany

➔ **Starts an eight-year Jutland rail contract in Denmark (right)**

- ➔ Begins the bus element of the Achterhoek Rivierenland bus/rail contract in the Netherlands
- ➔ Begins an eight-year bus contract in Halland, Sweden
- ➔ Awarded and begins a 10-year Polish rail contract
- ➔ Begins a five-year contract to operate and maintain the Metro do Porto tram network in Portugal



2009 ➔ **Begins a 164-bus operation in Stockholm, Sweden (right)**

- ➔ Expands Swedish rail operations with a second contract between Göteborg and Örebro
- ➔ Begins a 12-year contract providing rail services between Freilassing and Berchtesgaden in Bavaria, Germany



2008 ➔ Acquires UK bus, coach and airport-related transport operator TGM

➔ **Increases stake in Barraqueiro in Portugal to 31.5 per cent (right)**

- ➔ Acquires Spanish bus operator Empresa de Blas y Cia SL (Deblas) of Madrid
- ➔ Acquires 80 per cent of Eurobus (Hungary and Slovakia) and acquires remaining shares in 2009
- ➔ Starts the Hoeksche Waard and Goeree Overflakkee bus contract to the south of Rotterdam, the Netherlands
- ➔ Acquires German bus company Südbrandenburger Nahverkehrs GmbH, operating bus services in the Oberspreewald-Lausitz region of Brandenburg



2007 ➔ Acquires Madrid bus companies, Esfera and Autocares Fray Escoba

➔ Acquires Bosak Bus and Osnado Spol in the Czech Republic

➔ **Enters a joint venture with FNM Group and acquires 49 per cent of SPT Linea, Italy (right)**

- ➔ Acquires Veolia Scandinavia, Denmark's second largest bus operator
- ➔ Wins a three-year rail contract to operate trains in Kujawsko-Pomorskie in north-west Poland
- ➔ Wins and starts operating the CrossCountry rail contract, UK
- ➔ Enters the Swedish rail market operating the nine-year Pågatåg regional train contract
- ➔ Acquires a majority stake in bus and rail company Ostthannoversche Eisenbahnen AG which provides services in Lower Saxony, Germany
- ➔ Through a contract win, acquires 80 per cent of bus operator Neißeverkehr GmbH in north-east Germany
- ➔ Begins operating two new 10-year rail contracts in Bavaria, Germany



David Martin Chief executive

Our **executive committee** sets Arriva’s strategy and direction. It is also responsible for the implementation of the strategy, and oversees the sound running of operations. It monitors operational and financial performance, assessment and control of risk, and prioritisation of growth opportunities. With representatives from the group’s divisions and main functions, the committee ensures that Arriva develops as a single entity in order to tap into our full potential and deliver sustainable growth.



Martin Hibbert
Finance
director

- Accounts
- Company secretarial
- Internal audit
- IT
- Legal and commercial services
- Property
- Tax
- Treasury



Alison O’Connor
Director -
human resources

- Corporate communications
- Health and safety
- Human resources
- Transport policy



Mike Cooper
Managing director
Arriva UK Bus

- Arriva Bus and Coach
- Arriva Buses Wales
- Arriva London
- Arriva Midlands
- Arriva North East
- Arriva North West
- Arriva Scotland West
- Arriva the Shires and Essex
- Arriva Southern Counties
- Arriva Yorkshire
- TGM Group
- The Original Tour



Bob Holland
Managing director
Arriva UK Trains

- Alliance Rail Holdings
- Arriva Trains Wales
- Chiltern Railways
- CrossCountry
- LNWR
- London Overground
- Tyne and Wear Metro



David Evans
Managing director
Arriva Mainland Europe

- Business development
- Czech Republic: bus
- Denmark: bus, rail
- Hungary: bus
- Italy: bus
- Malta: bus
- Netherlands: bus, rail
- Poland: rail
- Portugal: bus, rail, tram
- Slovakia: bus
- Spain: bus
- Sweden: bus, rail

Contents | Welcome from the chief executive | Who we are | **What we do** | How we work | Our stakeholders | Our business | Arriva UK Bus | Arriva UK Trains | Arriva Mainland Europe | Corporate responsibility

We provide accessible transport for people whatever the reason for their journey. We offer an attractive alternative to the private car whether travelling to work or school, accessing leisure activities, visiting friends or going shopping.

We operate a wide range of services including local buses, inter-urban commuter coaches, local, regional and national train services, trams and light rail, waterbuses and airport-related transport services.

We work across a range of transport markets, delivering high quality services to passengers and to our transport clients, who range from health trusts and transport authorities to local, regional and national governments.

It is not always immediately obvious that we are the local bus or train operator. Some of our clients choose to retain their own brand, and we operate on their behalf to their specified criteria.

That flexible approach, coupled with our unrivalled breadth of skills and experience, has earned Arriva the reputation of being **a valued, trusted partner across Europe.**

Flexible approach
Accessible transport
 Work and school
Valued
 Leisure and shopping
 Attractive alternative



We bid for contracts and make acquisitions where we believe we can run operations well and where we can use our knowledge and experience to make a real difference. That philosophy is underpinned by high quality service delivery, investment, innovation and value for money, delivered by professional teams across Europe.

We are also focusing on growing organically, exploring new ways that we can bring our skills and experience to transport provider clients.

Recognising the value in opening up to competition, transport markets across Europe are responding. They are at different stages of liberalisation, opening at different times and at varying speeds.

We work with transport authorities from the early stages of liberalisation to develop local solutions using our expertise of a wide range of contracting models.

We can mobilise teams quickly and effectively. Our transport experts take complex contracts from bidding stage to operational delivery efficiently and professionally.

The table below indicates the modes of transport we currently operate in various locations. We are still growing, and have the capability to provide these services in other territories.

	Buses	Trains/ light rail	Coaches	Water- buses	Trams
Czech Republic					
Denmark					
Hungary					
Italy					
Malta					
Netherlands					
Poland					
Portugal					
Slovakia					
Spain					
Sweden					
UK					

Why choose Arriva?

- ➔ Arriva was a **pioneer in the first wave of transport market liberalisation** in Europe and has a huge amount of experience of a wide variety of contracting models.
- ➔ We **value local management** and provide central support.
- ➔ We **deliver what we say we will deliver** - we are dedicated, honest, transparent and realistic.
- ➔ We **help create tailored solutions**, which is why many transport authorities have us as a first port of call.
- ➔ We have **in-depth market understanding** and an unrivalled breadth of experience in European passenger transport markets.

-  **Czech Republic**
400 people, 250 buses

-  **Denmark** 4,300 people, 1,450 buses,
44 train sets, 3 waterbuses

-  **Hungary**
450 people, 225 buses

-  **Italy** 3,450 people,
2,360 buses, 2 waterbuses

-  **Malta**
900 people, 265 buses

-  **Netherlands** 1,850 people, 580 buses,
58 train sets, 10 waterbuses

-  **Poland**
150 people, 22 train sets

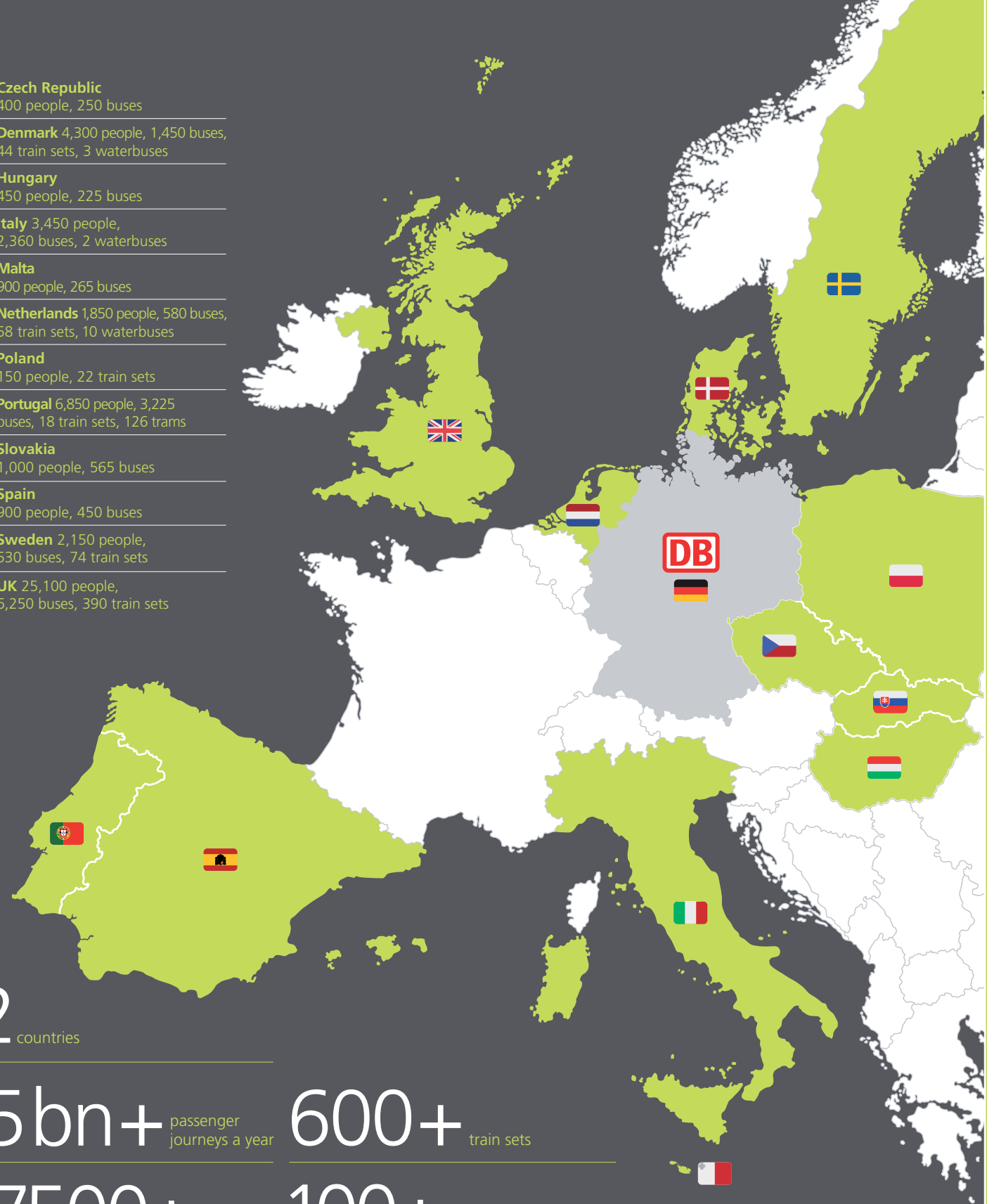
-  **Portugal** 6,850 people, 3,225
buses, 18 train sets, 126 trams

-  **Slovakia**
1,000 people, 565 buses

-  **Spain**
900 people, 450 buses

-  **Sweden** 2,150 people,
530 buses, 74 train sets

-  **UK** 25,100 people,
6,250 buses, 390 train sets



12 countries

1.5bn+ passenger journeys a year

600+ train sets

47,500+ employees

100+ trams

€3bn+ revenue

16,000+ buses

...and still growing

Transport markets vary by country, by region and by mode of transport. We operate different business models according to the structure and needs of the local market.



For more details on specific market characteristics see the 'Our business' section on page 14

Contracted services

With contracted services, the primary customer is usually some form of public sector body. A regional government or transport authority may offer various forms of contract giving an operator the right to operate services, usually exclusively, on a particular route or in a specific area.

Most of our mainland European bus and rail markets are contracted services. In the UK, the London bus market and the rail market are contracted services.

There are two main types of contracted arrangement: gross cost and net cost.

With **gross cost contracts**, the tendering authority agrees to pay an operator a specified sum to provide the specified service for a specified period, keeps the passenger revenue and often sets the routes and specifies the vehicles.

The London bus market, some of our rail operations in Sweden and bus contracts in Denmark, Sweden and Madrid, in Spain, are gross cost contracts.

With **net cost contracts**, the operator takes on both the revenue risk and the cost risk, and keeps passenger revenue. The tendering authority generally provides a contribution in the form of additional contracted income, where the cost of providing such a service would not be commercially viable if it depended solely on the passenger income that it could achieve.

UK rail contracts, Italian bus contracts and some Dutch bus and rail contracts are net cost contracts.

Deregulated services

With deregulated services, the commercial relationship is directly between Arriva and our passengers.

As passenger payments are the main source of income, services have to be profitable in order to be sustainable. They need to generate the financial returns which underpin investments in replacement vehicles, our depot facilities, and the expansion and development of services.

Operators accept the revenue risk, so if the travelling public decides to switch to another form of transport, the lost revenue directly affects our finances.

Most bus operations in the UK outside London operate on a purely commercial basis. Our operations in Spain (excluding Madrid) and Portugal also operate on a largely commercial basis.

Relationships
Partnership
Genuine
Opportunity
Add value

Here are some examples of the types of business models we operate.



Contracted services Gross cost: Denmark

Bus service tendering in Denmark is well established with around 90 per cent of services tendered.

Six passenger transport authorities in Denmark have responsibility for bus service provision.

They set out the routes, ticket prices, timetables, contract duration and service standards in their regions, and invite bus operators to bid to operate specific routes.

Winning a route for Arriva means that we operate the services for a set period – on average six years – at a price agreed with the transport authority.

To ensure operators maintain high quality services, the authorities set quality and service incentives and penalties.

Contracted services Net cost: Italy

The Italian bus market is highly fragmented.

Most of the bus market is still owned by regional authorities, who are responsible for bus service provision and setting passenger charges inside a general framework.

The market is highly subsidised, with low cost to passengers. The state provides funding nationally and subsidies are available for fleet investment.

Arriva operates alongside a range of municipal and privately owned bus operators. In Italy, we are typically involved in joint ventures and partnerships.

Deregulated services Commercial: UK

Outside of London, bus services have operated to a deregulated system since privatisation in the mid 1980s.

Bus operators like Arriva can run any type of bus service as long as they give notice of any introduction, changes or withdrawals.

Services are operated on a commercial basis. Operators keep all the passenger revenue and they bear the revenue and cost risk.

Where there is deemed to be a social need for services, local authorities may contract operators to provide services on routes that would not otherwise be commercially viable.

Legislation is paving the way for the liberalisation of transport markets across Europe. Liberalisation describes the opening of markets to competition through competitive tendering. Market liberalisation, as intended by European legislation, adds value and helps to ease pressure on the public purse. **This is an opportunity for us to add value and is a major growth driver for Arriva.**

For more information
on market liberalisation
see page 29

We have a broad range of stakeholders and aim to operate in ways which benefit their different sets of interests. For some, we are a trusted partner or a strategic adviser. For others, we help them to keep their day running as planned. Whatever the relationship, whether it is directly with the passenger or with a partner or tendering organisation, we work hard to deliver consistently high levels of professionalism and service.



Passengers

Our passengers expect a safe, clean, service and a reliable journey.

We strive to meet their expectations and deliver a service that keeps our passengers happy and encourages them to use our services again.

Our latest UK customer survey showed that 92 per cent of some 20,000 Arriva bus passengers surveyed are satisfied with our service. In Denmark, we are a top performing rail operator with market-leading punctuality contributing to record levels of customer satisfaction.

Arriva bus services in the Frisian Islands in the Netherlands came top in a 2010 national public transport survey which measures customer satisfaction.

For our passengers, we aim to provide:

- a reliable service
- safety and comfort
- an attractive alternative to the private car.

Satisfaction
Trusted
Reliable
Relationship
Transparency
Professional



Contract-awarding clients



Contract-awarding authorities and bodies choose Arriva because we have a strong track record of meeting our commitments, and we provide a high quality service and value for money.

Providing strategic advice and innovative transport solutions is the part of our service that distinguishes us from others.

Clients will benefit from our unrivalled knowledge and experience, gained from years of operating across a range of differing markets.

We are adept at managing business change, process management, handling complex legislative requirements in different markets, and working within different cultures.

For our transport clients, we aim to provide:

- the benefits of an experienced, trusted partner
- a willingness to share our expertise
- improved services/high quality operation
- management of smooth mobilisation
- value for money services that their communities rely on
- satisfaction for their customers: our passengers.

We, together with our clients, share the same key drivers that ensure commercial success and sustainable operations:

	Arriva	Transport clients
Efficiency	✓	✓
Reliability	✓	✓
Value for money	✓	✓
Customer service	✓	✓

Employees



Across Europe, we are a significant employer in many areas. Our employees represent a diverse range of backgrounds and cultures.

We value our people and the important role they play in our success, and we believe in recognising and celebrating individual contribution.

Our aim is to maintain a supportive, respectful working environment in which each individual is given training and development opportunities to enable them to fulfil their true potential.

We encourage flexibility and a willingness to learn, and we embrace questioning the status quo to continuously improve our business.

For our employees, we aim to provide:

- worthwhile long-term employment
- training and development opportunities
- a safe, supportive and motivating work environment
- the opportunity to provide a valuable service to their local community.

Business partners

For our business partners, we aim to provide:

- trust and transparency
- reliable operational support and professional management teams
- expertise in transport and process management.

Wider community

For the wider community, we aim to provide:

- responsible management of the environmental impact of our operations
- social and economic benefits of accessible travel as an attractive alternative to the private car.

Our business is growing strongly by retaining contracts, winning new ones and by acquisition. We work hard to continually improve our businesses to ensure they are sustainable and fit for growth.

Our business comprises three divisions: Arriva UK Bus, Arriva UK Trains and Arriva Mainland Europe. While we are a large, international business, we are also a local business wherever we work. We encourage and actively facilitate the sharing of experience, knowledge and know-how across our group. This results in a tremendous amount of value, avoids reinvention and captures excellence from all three divisions.

The **group order book**, below, represents future income from assured contracts already won by the group.

It tracks estimated future revenue from contracted business, of over a year in duration, rolled forward to reflect contract variations and updated to current prices at each year end.

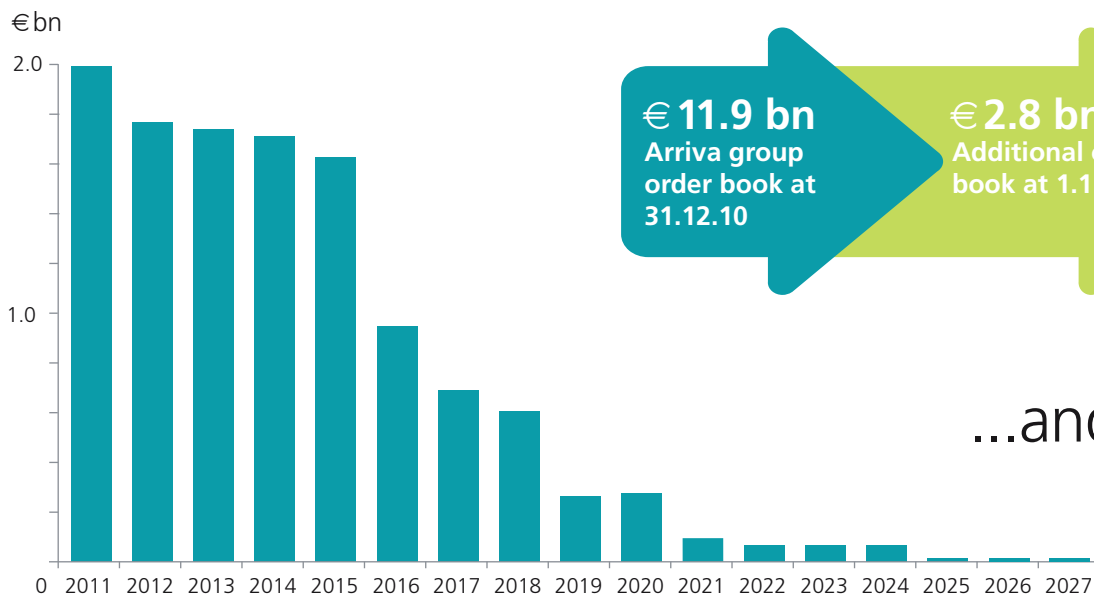
The group order book:

- grew 2.2 per cent to €11.9 billion in 2010
- shows healthy growth in Arriva Mainland Europe and Arriva UK Bus
- reflects long-term contracts at Arriva UK Trains.

In addition to the order book, group revenue includes passenger revenue from commercial services for example UK regional bus and our Spanish operations.

The contracted revenue from businesses combined into Arriva from Deutsche Bahn from January 2011 adds a further €2.8 billion to the total group order book.

Arriva group order book at 31 December 2010



...and still growing

Introducing our divisions



Arriva UK Bus

- ➔ One of the UK's biggest bus operators.
- ➔ Provides a wide range of services including rural, urban and inter-urban.
- ➔ Market-leading innovator and customer champion.
- ➔ Able to respond quickly to changing needs and new opportunities.

See page 16

Arriva UK Trains

- ➔ More than a decade of experience of running trains in the UK.
- ➔ Leading train operator with five major rail contracts.
- ➔ Entered the market in 2000 – has contracts to 2021.
- ➔ Well positioned to bid for future contracts.

See page 22

Arriva Mainland Europe

- ➔ A leading European transport provider and trusted partner.
- ➔ Operations across 11 countries.
- ➔ Unrivalled experience and skills: top quality management teams.
- ➔ Range of vehicles including buses, trains, coaches, trams and waterbuses.

See page 28

Introducing our operations

Our scale and our expertise mean that we can operate a range of transport modes across our businesses, working to a range of business and contracting models.



Buses



- ➔ local, commercial services
- ➔ contracted services
- ➔ demand response
- ➔ sightseeing tours
- ➔ airport – landside/airside
- ➔ school services
- ➔ tendered services



Trams



- ➔ joint ventures
- ➔ contracts
- ➔ station management
- ➔ under/overground
- ➔ maintenance



Trains and light rail



- ➔ rural, commuter lines
- ➔ long distance mainlines
- ➔ station management
- ➔ under/overground
- ➔ contracts
- ➔ maintenance



Coaches



- ➔ contracted services
- ➔ private coach hire
- ➔ tour services
- ➔ inter-urban



Waterbuses



- ➔ canal/harbour buses
- ➔ contracted services

Contents | Welcome from the chief executive | Who we are | What we do |
How we work | Our stakeholders | Our business | **Arriva UK Bus** |
Arriva UK Trains | Arriva Mainland Europe | Corporate responsibility

Arriva is one of the largest bus operators in the regional bus market and in London.



6,250 buses

c.99%
scheduled
mileage operated

more than **18,600** employees

15% regional
market
share

770 million+
passenger journeys a year

Arriva is one of the UK's largest bus operators, providing services for customers in the north east, north west and south east of England, Yorkshire, the Midlands, Scotland and Wales.

We provide transportation for airports and airlines, including terminal transfer services, crew and passenger coach movements, car park and hotel shuttle bus contracts. We also work in partnership with airport authorities, ground handlers and airlines.

We provide flexible demand response services tailored to meet specific needs.

We have a bus and coach distributor, Arriva Bus and Coach, based in Cleckheaton. It retails new and second hand buses and coaches, and provides fleets for short and long-term rental.

Arriva also provides open-top bus tours of London through our commercial sightseeing business, The Original Tour.

Operationally our focus is firmly set, as always, on our passengers, transport authority partners and other transport clients. Our reputation for operational efficiency has helped win new contracts and secure contract renewals, growing our order book of secured contracts in London by 15 per cent in 2010 to £1.1 billion.

We are constantly evolving to ensure we are able to respond quickly to changing markets and customer needs so that we continue to grow successfully and sustainably. Our wealth of experience and our employees' skills underpin our ability to provide a wide range of relevant transport solutions that people want and will use.

We work hard to make bus travel more attractive and more accessible. Innovative approaches include easy to use mobile ticketing, making it simpler for people to buy tickets. Our user-friendly website helps to make sure that finding out about our services is easy and intuitive.



The market
 The UK bus market is at a mature stage of liberalisation and has two different operating environments. Outside London the regional market is deregulated and we operate on a commercial basis. In the capital the market is competitively tendered and we operate under contract to Transport for London.

We make bus travel more attractive and more accessible

Nine out of 10 customers are satisfied with the service we provide

We focus on building strong relationships

We aim to be the partner of choice for local tendering authorities

We have a flexible approach drawing on pan-European experience

We work with our partners for the benefit of passengers

Regional bus

- ➔ Entered the regional bus market in 1996
- ➔ 12,800 employees
- ➔ 4,550 buses

Our position

Arriva is the third largest bus provider in the regional bus market. We primarily operate commercial routes, however we also provide some contracted services for local authorities, airport-related and express commuter transport, and services for health authorities.

The market

The bus market outside London was deregulated and subsequently privatised during the 1980s and operates on a commercial basis. Each operator's relationship is directly with the passenger and revenue principally comes directly from passengers and through carrying concessionary passengers. Local authorities may also tender contracts where there is deemed to be a social need for services, which would not otherwise be commercially viable.

Successes

- ➔ Our bus drivers achieve consistently high ratings from our customers, maintaining a 91 per cent satisfaction score since 2007.
- ➔ Customer satisfaction ratings have improved in other key aspects of the journey experience, such as the cleanliness and condition of our buses and the ease of buying a ticket.
- ➔ Arriva Yorkshire, among others, has been awarded Investors in People status. Arriva Yorkshire's accreditation is across the entire region, demonstrating consistency across internal communications and highlighting that our employees feel engaged and committed to doing well.
- ➔ Arriva Merseyside's Birkenhead depot took the award for Top National Bus Depot at the UK Bus Awards 2010 for its focus on service delivery and employee communication.
- ➔ Arriva's Fastrack service in Kent, a Bus Rapid Transit system, was recognised for its outstanding innovation at the 2010 International Transport Forum/International Association of Public Transport Awards.

London bus

- ➔ Entered the London bus market in 1980
- ➔ 5,800 employees
- ➔ 1,700 buses

Our position

In London we are the joint market leader, running more than 20 per cent of the capital's bus services under contract to Transport for London (TfL). Covering around 68 million miles, we provide 400 million passenger journeys in the capital every year.

The market

London's bus services were privatised in the 1990s and now operate under contract to TfL, the city's transport authority. TfL specifies the required routes, timetables and vehicles. Revenue comes from TfL, who pay us for running services on their behalf. Contracts are typically five years in length and a bonus/penalty regime is linked to service quality.

Successes

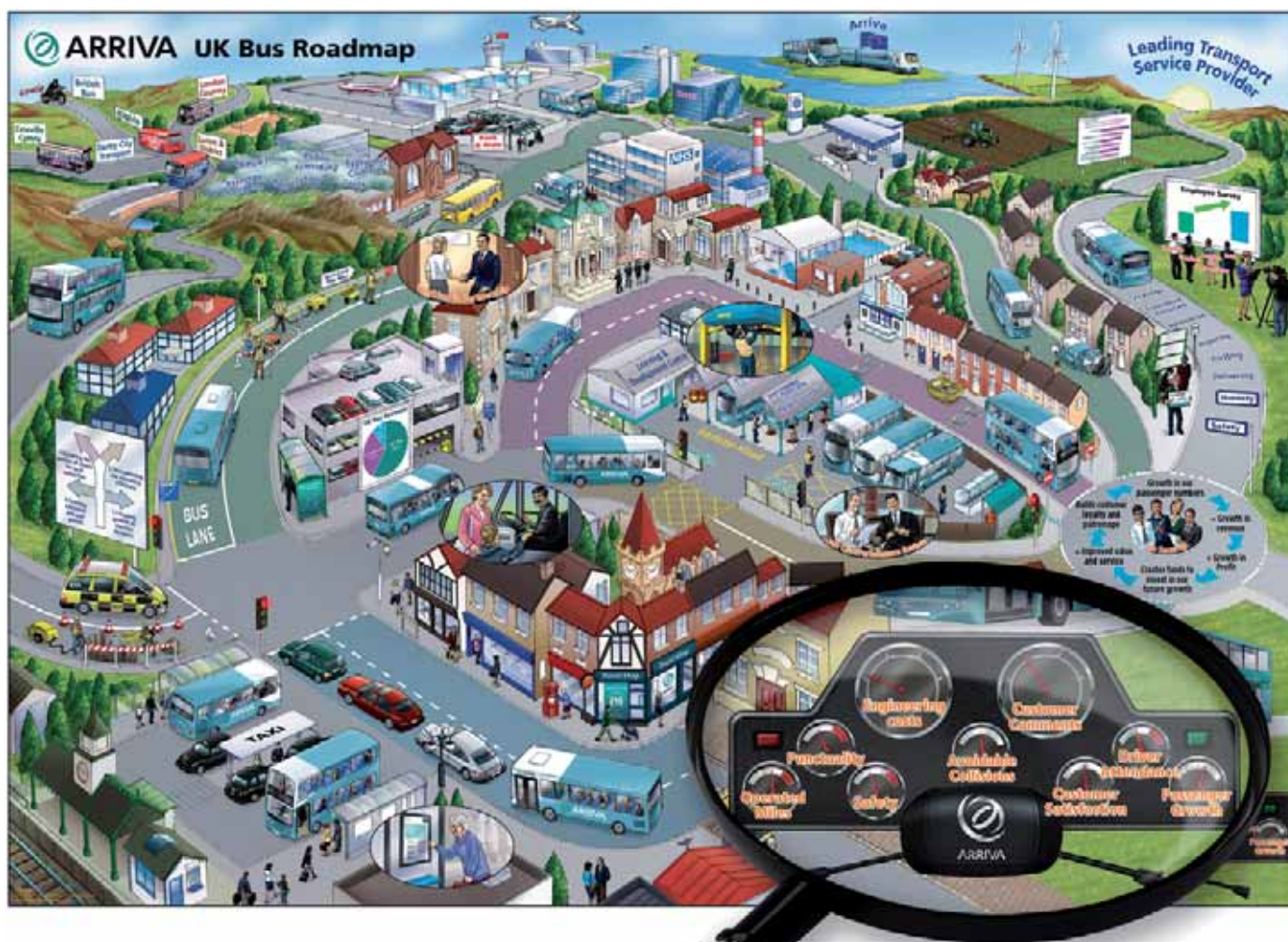
- ➔ Delivering high quality services has established us as one of the best performing operators in the capital. Arriva is consistently among the top five London bus operators for service reliability.
- ➔ Arriva's high standards of operational performance and commitment to quality have been recognised at the UK Bus Awards. The company's Beddington Farm, Brixton and Wood Green garages have each been awarded London Bus Garage of the Year in recent years, following independent nominations by TfL.
- ➔ Arriva London route controllers were also recognised for their drive to ensure that Arriva delivers an efficient and reliable service, picking up the London Transport Quality Award 2010.
- ➔ Arriva has consistently retained the vast majority of its TfL contracts and has been successful in winning new contracts.

Investing in the future

- By investing in our fleet, we immediately improve the look and feel of our services. We have ordered more than 400 new buses for delivery in 2011, bringing investment in fleet renewal in the UK to £250 million since 2008.
- The Original Tour has invested in excess of £5 million in low floor, wheelchair accessible tour buses, and will take delivery of a further 16 new buses during 2011.
- Passengers across the UK are now increasingly seeing modern, low floor, environmentally friendlier buses on the roads in all of Arriva's operating areas.
- Customer satisfaction in both the condition and cleanliness of Arriva buses is increasing with the most recent figure at 84 per cent.
- The proportion of low floor vehicles in our UK bus fleet is set to reach 90 per cent by the end of 2011, making bus travel more accessible to more people.
- We invest more than £5 million a year marketing our services as by raising awareness of the environmental benefits of bus travel we encourage more people to consider using the bus.

Investing in our people

- Our 18,600 employees are central to ensuring we deliver high quality services for our customers.
 - We are committed to giving our employees the opportunities and support to help them flourish as individuals as well as team members.
 - By investing in our people we become an employer of choice, while encouraging excellence in transport solutions ranging from demand response to large scale passenger transport.
 - We actively support the growth of talent in our business to take personal and business performance from good to great. Whether improving performance in a current role or developing skills for the future, a range of support is available to all employees across the business aligned to the overall strategy and 'Big Picture' goals. The Big Picture is an innovative employee programme centred around the graphic of a roadmap, shown below, which is used in interactive workshops.
- The roadmap helps our people understand our business strategy, our focus on customers and stakeholders, and how they can effectively contribute to our success.



Partnerships Passengers Relationships Quality Flexible approach

Working in partnership

Building and maintaining excellent relationships with our local authority partners is firmly at the heart of our business.

Our local operational managers work closely with transport authority teams and other local stakeholders for the benefit of passengers and local communities. Through listening to their feedback we shape our business to support local needs.

Our flexible approach and the experience and best practice we share and trade with our colleagues across Europe means we are well equipped to grow our scheduled service work and introduce new types of services. We are a natural partner of choice for local authorities, passenger transport executives and new customers as we share their aims to provide high quality, reliable transport services for their local communities.

Successes

- ▶ We conduct research to find out what local authorities really think about us. Encouraged by excellent feedback, we focus on specific areas where our partners tell us we could improve. Reflecting the feedback we have restructured our local businesses to align more closely with local authority teams.
- ▶ A major network review in Milton Keynes in partnership with Buckinghamshire County Council has led to joint investment. New vehicles, bus prioritisation measures and marketing campaigns have been designed to encourage growth in bus use in one of Britain's fastest growing urban areas.



Arriva has a proven track record of working with local authorities and passenger transport executives. **Kent's Bus Rapid Transit system Fastrack**, operated by Arriva in partnership with Kent County Council, is one of the best examples in the UK of what has been achieved through close co-operation between various partners, both during the network planning phases and since the service was launched.

Fastrack is flexible and has the potential to grow as new residential or commercial developments require. Extending Fastrack services to Ebbsfleet International Station has provided a link to fast rail connections to London and the Channel Tunnel.

Through a partnership approach with the local authority and housing developers, the award-winning Fastrack network provides local people with a real alternative to the private car.



Far left top The world's first hybrid double deck bus, London

Far left below Midlands-based Wardle Transport provides wheelchair-friendly transport solutions

Left Arriva provides a range of park and ride services

Below Mobile phone ticketing



- ▶ A voluntary quality partnership between Arriva Yorkshire and North Yorkshire County Council is delivering improved customer information and better quality services. Also in Yorkshire, Arriva and Wakefield Metropolitan District Council have implemented bus priority schemes to speed up journey times into and out of the city.
- ▶ Arriva's UK coach operator TGM Group, Arriva UK Trains Road Transport Section and Arriva Trains Wales worked together to deliver the contract to provide VIP and team transport at golf's 2010 Ryder Cup. The event demonstrated Arriva's ability to deliver dynamic and versatile transport solutions for major sporting events.
- ▶ Through its Wardle Transport business, Arriva provides essential services in Stoke-on-Trent with more than 12,000 journeys every year for people with special educational needs or limited mobility.
- ▶ Arriva successfully operates the Southport park and ride services as part of a 13-year, long-term relationship with Sefton Metropolitan Borough Council. The park and ride service is one of many operated by Arriva.
- ▶ Through its commitment to quality Arriva secured a five-year contract to provide the city of Durham's park and ride services for Durham County Council. Combined investment in new buses is providing an excellent alternative to the car for shoppers and commuters, which passengers said they would recommend to others in a recent survey.

Technology and innovation

- ▶ Following our launch, with TfL, of the **world's first hybrid double deck bus**, and the subsequent extension of the hybrid fleet to 31, we are providing valuable feedback and helping manufacturers develop the technology. Another 20 hybrid buses will enter service in London in 2011.
- ▶ A **new control centre and satellite base** in Islington, London, is enabling route controllers to manage the smooth running of routes for TfL using a GPS location system.
- ▶ Arriva was the first bus operator globally to introduce **mobile phone ticketing** across a national network.
- ▶ An annual independent survey of Arriva bus customers shows our value for money rating improved in 2010 following the launch of an **online fuel calculator** via www.arrivabus.co.uk/fuel. The easy-to-use feature allows customers to compare the cost of travelling by car with the equivalent bus journey.
- ▶ The 'Arriva 110 Takes Off' campaign in Yorkshire won Campaign of the Year at the UK Bus Awards 2010. Judges were impressed with its underlying aim of **changing perceptions of bus travel**.
- ▶ Customers can now buy their weekly and four-weekly bus tickets from thousands of shops which provide PayPoint, Payzone and epay **electronic pre-payments systems**.
- ▶ We developed **pioneering fuel-saving system** EcoManager with technology provider 21st Century. The system is now in place across our UK bus operations.

Contents | Welcome from the chief executive | Who we are | What we do |
How we work | Our stakeholders | Our business | Arriva UK Bus |
Arriva UK Trains | Arriva Mainland Europe | Corporate responsibility

Arriva is a major train operator in the UK, with more than a decade's experience in providing passenger rail services and sharing strong relationships with our customers, transport bodies and tendering authorities.



5 rail contracts

6,300 employees

390 train sets

394 stations managed

Arriva entered the UK rail market in 2000. Our services range from light rail and rural commuter lines to long distance and inter-urban journeys.

Arriva has a reputation for delivering what it says it will deliver. We have consistently demonstrated smooth and seamless contract mobilisation. Our contracts have a track record of excellent operational performance and punctuality and we are committed to further improvements.

Recently published moving annual average public performance (MAA PPM) statistics for train operations run by Arriva range from 88.2 per cent up to 94.3 per cent, amongst the highest in the country.

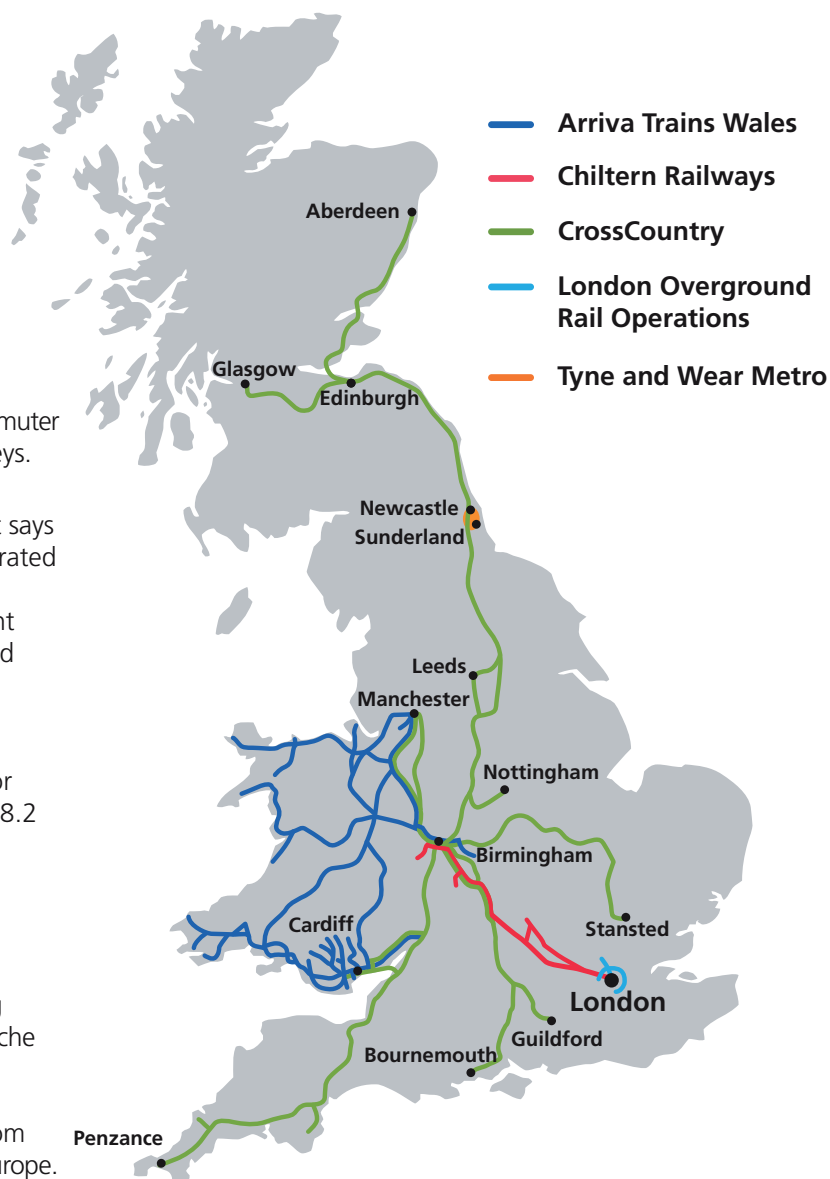
Arriva operates about 10 per cent of the UK passenger rail network in terms of both passenger kilometres and turnover including businesses combined into Arriva from Deutsche Bahn from 2011.

We draw on experience and best practice from Arriva's rail operations in the UK and across Europe. We are backed by Deutsche Bahn bringing further transport expertise and access to capital. We are well placed to bid for future rail contracts as they come up for tender.

The market

The UK passenger rail market is at a mature stage of liberalisation. Almost fully contracted, it is competitively tendered by the Department for Transport which sets service provision and timetables.

The 22 rail contracts are large, mainly net cost and vary in length. Together, they provide more than 50 billion passenger kilometres a year. The rail market is valued at £8 billion.



Key dates

2011	Chiltern Railways, London Overground, and Tyne and Wear Metro, operated by Deutsche Bahn, became part of Arriva UK Trains
2010	Acquired open access company Alliance Rail Holdings
2008	Acquired rail maintenance business LNWR
2007	Won and started the CrossCountry contract (until 2016)
2003	Won and started the Arriva Trains Wales contract (until 2018)
2000	Entered the UK rail market

Arriva Trains Wales

Contract duration: 2003 - 2018

- 2,000 employees
- 1,000 route miles
- 126 train sets
- 244 stations managed
- 950 services every weekday
- Punctuality (MAA PPM): 94.3%

On a network covering more than 1,000 miles of track, Arriva Trains Wales provides inter-urban, rural and commuter passenger rail services throughout Wales and the English border counties. It operates all stations in Wales, and those predominantly served by it in the border counties, including Chester, Shrewsbury and Hereford.

Arriva Trains Wales works closely with the Welsh Assembly Government, the contract provider, in delivering the rail elements of their National Transport Plan. The business has invested more than £30 million in train maintenance, fleet reliability improvements and refurbishment, station upgrades, improved ticketing and customer information facilities, and customer and employee security.

Successes

- Arriva was awarded a Golden Whistle award for the best overall right time (arriving on time or early) train operator for punctuality in the UK.
- The industry's National Passenger Survey recently confirmed that Arriva Trains Wales' customer satisfaction had risen to 87 per cent, six per cent above the contract benchmark.
- Arriva started operating on the Ebbw Valley Line in 2008, providing passenger services on the line for the first time in 40 years, with 100 services a week to Cardiff. Arriva also began operating on the Vale of Glamorgan Line in 2005.
- In 2008 Arriva launched a twice daily direct service from Holyhead to Cardiff and return including first class accommodation and a restaurant car.
- Arriva is delivering a £7.5 million train refurbishment programme on behalf of the Welsh Assembly Government which will provide improved on-board facilities.



**Faster
trains**
 Continuous improvement
 State-of-the-art technology
**Operational
excellence**
 Industry leading
**Major
investment**





Chiltern Railways

Contract duration: 2002 - 2021

- Became part of Arriva in 2011
- 790 employees
- 215 route miles
- 67 train sets
- 36 stations managed
- 353 services every weekday
- Punctuality (MAA PPM): 94.3%

Chiltern Railways provides scheduled passenger services along the M40 corridor between London Marylebone and Birmingham Moor Street, and London Marylebone to Aylesbury via Amersham.

It is the only UK mainline train company to hold a 20-year contract. Passenger miles have increased threefold since 1996.

Successes

- Chiltern Railway's £250 million Evergreen route upgrade project will deliver improved journey times from the Midlands to London. It will also add a new line to Oxford, the first new rail link from London to a major British city since 1910. Faster trains, reduced journey times, and new park and ride hubs are among the benefits that the major investment programme will deliver to hundreds of thousands of passengers.
- Punctual trains and comfortable seats helped Chiltern Railways win Best Train Company at the 2010 Guardian Travel Awards. The awards highlight the very best experiences across the travel industry by newspaper readers.
- In 2010 Chiltern Railways celebrated the tenth anniversary of Warwick Parkway: the first station to be built and owned by a UK train operator. Since opening, the award-winning station has received much praise, with passenger numbers rising to over half a million a year.

Chiltern Railways

If you think our way, travel our way.



CrossCountry

Contract duration: 2007 - 2016

- 1,620 employees
- 1,478 route miles
- 91 train sets
- 295 services every weekday
- Punctuality (MAA PPM): 88.2%

The CrossCountry network is the most extensive rail contract in the UK. Stretching from Aberdeen to Penzance, and from Stansted to Cardiff, it calls at over 100 stations.

Based in Birmingham, CrossCountry connects seven of the UK's 10 largest cities and delivers 295 services every weekday, equating to some 31 million passenger journeys a year.

Successes

- For the second year running, CrossCountry won a Golden Spanner award in 2010 for operating one of the most reliable train fleets in Britain. Its Voyager 220 trains outperformed all other intercity fleets. CrossCountry was also presented with a Golden Whistle for being the most improved train operator for reducing its delay minutes.
- CrossCountry has pioneered print-at-home rail e-tickets in the UK, bringing easier booking and purchasing to customers' homes. Now, 20 per cent of all tickets bought online are e-tickets.
- Following successful trials, CrossCountry is rolling out a new seat reservation facility on all main routes to help customers who don't know in advance exactly which train they want to catch. Passengers can now reserve their seat via mobile phone up to 10 minutes before the train leaves the station.
- CrossCountry is looking to further develop its free iPhone timetable app which has been downloaded more than 200,000 times.

crosscountry

London Overground Rail Operations Limited (LOROL)

Contract duration: 2007 - 2014

- ➔ Became part of Arriva in 2011
- ➔ 1,140 employees
- ➔ 70 route miles
- ➔ 61 train sets
- ➔ 55 stations managed
- ➔ 838 services every weekday
- ➔ Punctuality (MAA PPM): 94.2%
- ➔ Two-year extension option on contract

LOROL operates the London Overground network, including trains, services and stations, under contract to Transport for London (TfL). The joint venture with partners MTR Corporation was launched in November 2007.

The network covers Stratford to Richmond, Watford Junction to Euston, Clapham Junction to Willesden Junction, Barking to Gospel Oak, and the East London Line between Highbury and south London. It links 20 of London's 33 boroughs.

Since the start of LOROL's contract in November 2007, passengers have benefited from new trains, staffing of all stations, and the upgrading of stations inherited at the start of the contract.

Successes

- ➔ LOROL worked with TfL to open the East London Line ahead of schedule involving recruiting 250 new employees, the opening of a dedicated control centre and the deployment of a new fleet of class 378/1 electric trains. Since opening, an average of 95.8 per cent of East London Line trains have met the public performance measure, making it one of the best performing railways in the country. On opening the new line, the number of services operated each day by LOROL doubled.
- ➔ A new fleet of class 172 diesel trains were procured by LOROL and commissioned in autumn 2010. The new units settled into reliable service delivering industry-leading levels of performance.



- ➔ Customer satisfaction since the start of the concession has increased from 69 per cent to 85 per cent.
- ➔ LOROL won a Golden Whistle award for most improved operational performance as measured by right time arrivals (arriving on time or early).
- ➔ Passenger journeys on the existing network, excluding the new East London Line, have grown by 40 per cent over 18 months, with lengthened trains introduced on LOROL's key north London routes.





Tyne and Wear Metro

Contract duration: 2010 - 2017

- ➔ Became part of Arriva in 2011
- ➔ 510 employees
- ➔ 48 route miles
- ➔ 45 train sets
- ➔ 59 stations managed
- ➔ 1,907 services every weekday
- ➔ Two-year extension option on contract

The Tyne and Wear Metro is a light rail network of 60 stations used by 40 million passengers a year, serving Newcastle, Sunderland and the surrounding area in the north east of England. It was the UK's first modern light rail service. The seven-year contract covers delivery of the train service, fleet maintenance and modernisation of all trains, plus day-to-day station management.

Successes

- ➔ A 100 Day Clean Up campaign aimed at immediately raising station and train standards to the new Service Quality Regime won the Customer Service category at the 2010 Light Rail Awards. A software system to report and escalate faults was runner-up in the Innovation category.
- ➔ The My Metro staff engagement programme was central in helping motivate staff throughout a period of change. Managed in house, and delivered to more than 95 per cent of staff, the scheme helped to reassure employees, share the company's objectives and embed an understanding of its vision and values.
- ➔ A recent survey revealed improved customer satisfaction with eight out of 10 people saying they were satisfied with the Metro service. It also showed significant progress in ease of understanding signage, and clarity of announcements, with continued improvements in information, security and comfort, station lighting, and cleanliness.



LNWR



- ➔ Became part of Arriva in 2008
- ➔ 210 employees

Based in Crewe and founded in 1996, LNWR is a leading maintenance depot and servicing facility for electric and diesel trains. It is one of the largest train depots and stabling facilities on the West Coast Main Line and services one of the most diverse fleets of trains in the UK.

The business has grown following substantial investment in developing heavy maintenance work, and has recruited a versatile and skilled team of train maintenance professionals and is training apprentices.

LNWR now also operates from depots in Gateshead, Bristol, Cambridge and Eastleigh. The principal business of these depots is to service CrossCountry trains on behalf of Bombardier, however LNWR is looking to expand current operations to cover heavy maintenance and refurbishment work.

LNWR is currently working on a major 18-month contract for the overhaul and heavy refurbishment of Arriva Trains Wales fleets.

Another route: open access



Arriva, through Alliance Rail Holdings, is exploring opportunities for open access passenger rail services: those operated on a purely commercial basis, with no contract or concession agreements.

An open access operator must offer a service that provides national and network benefits, that is generally not otherwise available and does not simply duplicate routes already served by the network.

Operators apply to the Office of Rail Regulation for access rights and to Network Rail for train paths in the timetable.

Alliance Rail Holdings is finalising its development plans for the operation of new rail services on a number of routes from 2014.

Arriva is one of the largest public transport operators in mainland Europe, with operations in Denmark, Sweden, the Netherlands, Italy, Spain, Portugal, the Czech Republic, Poland, Hungary, Slovakia, and most recently Malta.



A leading pan-European public transport operator

11 countries

22,400 employees

9,900 buses

15 waterbuses

216 train sets

126 trams

Our position

After entering the mainland Europe transport market in 1997, Arriva has developed a significant footprint in 11 countries. We have achieved this by offering and delivering innovative, high quality, cost effective transport solutions for client bodies and passengers. We also lobby for accelerated market testing and work in partnership with client bodies to redesign and reinvigorate networks. We aim to build market leading positions wherever we operate.

Operating models

Our operations span a wide range of operating environments, in locations with varying market characteristics.

Arriva is a multi-modal operator with more than 150 contracts across mainland Europe. We have unrivalled experience covering a wide range of business models, from commercial to gross cost contracts including a range of fleet financing solutions. Contracts vary in duration and scale, from one to 15 years, and up to 300 buses or 50 trains. Many contracts have indexation elements, with direct coverage of labour and fuel cost increases.

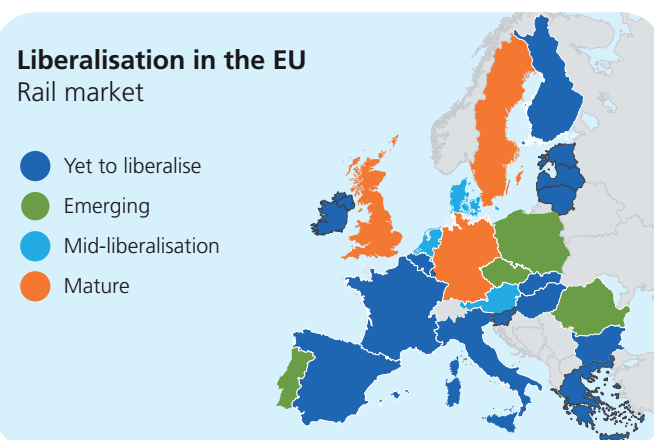
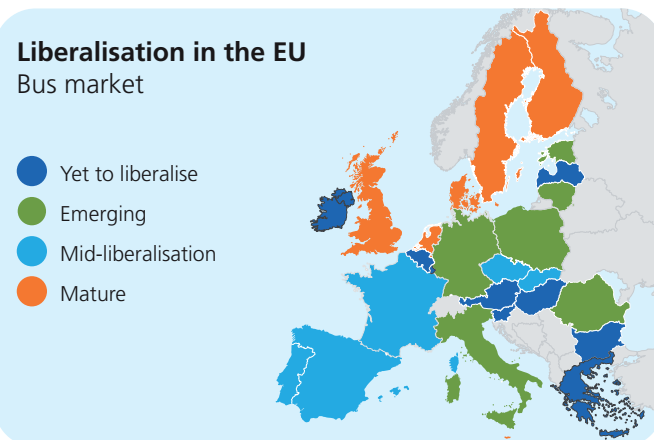
Not all countries in mainland Europe have contracted public transport systems. In some countries, mainly in Iberia, public transport is provided in the form of long concessions or on a commercial basis.

Arriva has a proven track record of delivering excellent operating performance.

- ➔ We are the top performing rail operator in the Netherlands, Sweden and Denmark, and have developed an excellent record in Portugal.
- ➔ We are best in class for bus services in the Netherlands, Sweden, Denmark and Galicia in Spain, with consistently good customer feedback in Italy and Portugal.

We have well developed skills for driving market opening and helping to deliver the benefits of liberalisation.

- ➔ We have expertise in every aspect of passenger transport including engineering, ticketing, timetabling, operations, people management, marketing and customer service.
- ➔ We deliver value for money for client bodies and passengers.
- ➔ We provide innovative solutions drawing on pan-European knowledge and group-wide expertise.
- ➔ We are a valued partner and have a strong stakeholder focus.





Bus

Liberalisation stage: mature

- ➔ Entered bus market in 1997
- ➔ 1,450 buses
- ➔ 3 waterbuses
- ➔ 3,900 employees

Our position

Arriva is the largest bus operator in Denmark, with an overall market share of around 50 per cent. Growth has taken place through tendering and the acquisition of public and private bus companies. We have a strong position in the capital, Copenhagen, where we operate approximately half of the market.

The market

The bus market in Denmark is a regulated, mature market. Tendering is well established and approximately 90 per cent of the market is tendered.

Six passenger transport authorities have responsibility for public transport services, with funding provided by local authorities.

Contracts are typically gross cost and an average of six years in length, with quality and service incentives and/or penalties.

Rail

Liberalisation stage: mid-liberalisation

- ➔ Entered rail market in 2003
- ➔ 44 train sets
- ➔ 400 employees
- ➔ 8.8 million train kilometres operated per annum

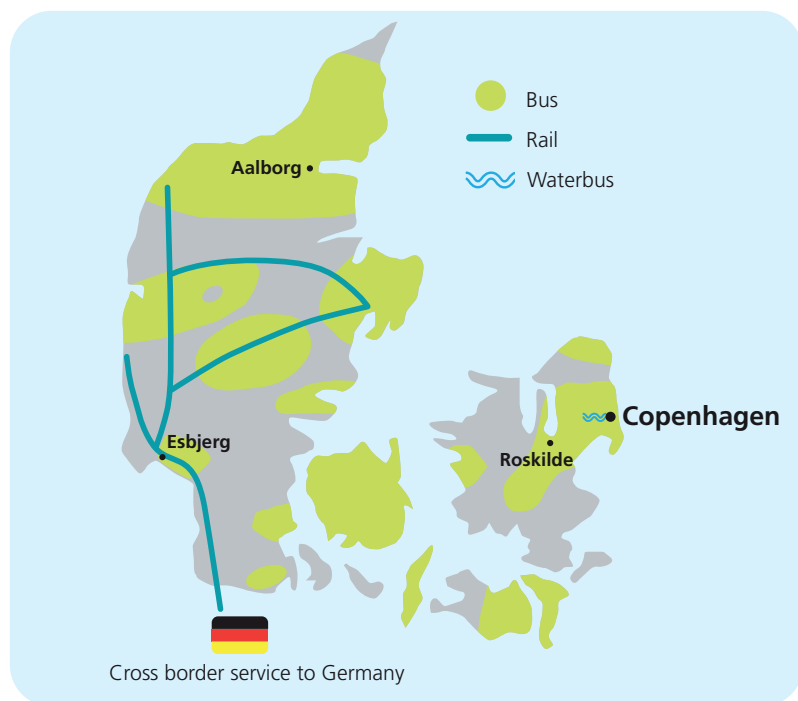
Our position

Arriva was the first and only private company to be awarded a rail contract. We operate approximately 15 per cent of the regional network, with operations focused in Jutland.

The market

The Danish rail market is regulated, having opened to public tendering in 2000. The Danish parliament is responsible for the regulatory framework for transport provision and setting fares. Contracts are typically net cost, with bonus and/or penalty regimes for punctuality and customer satisfaction.









The market is dominated by the public sector, with Danish State Railways operating approximately 75 per cent of train kilometres in Denmark, under direct award from the Ministry for Transport.



Successes

- We continue to have excellent satisfaction levels on our buses in Copenhagen, with the client body customer satisfaction data for 2010 showing Arriva topping the ratings with 83 per cent of passengers happy with our services.
- National statistics for 2010 reveal we are the top performing operator for punctuality in the Danish rail market. Surveys carried out throughout the year revealed record levels of rail passenger satisfaction averaging at 81 per cent.
- Arriva retained its Jutland rail contract, started in 2003, when it came up for re-tender in 2009 through an innovative bid which included infotainment on board and at train stations, and real-time information for passengers. Operations now run until 2018, with a possible extension until 2020.

Key dates

	2011	Pan Bus, operated by Deutsche Bahn, became part of Arriva
	2009	Re-won the Jutland rail tender, starting in 2010
	2007	Acquired Veolia's bus operations in Denmark
	2004	Acquired Wulff bus operations in Jutland and Copenhagen
	2003	Started operating an eight-year rail concession in mid and west Jutland
	2001	Acquired state-owned bus company Combust
	1999	Acquired Bus Danmark (with additional bus services in southern Sweden)
	1997	Acquired Unibus Holdings



Case study: innovative partnership

Against a background of falling patronage in Copenhagen during recent years, Arriva approached the tendering authority in Copenhagen with a proposal for addressing and reversing the trend, using our knowledge and expertise from many years operating across Europe.

Arriva and the authority worked together to target customer satisfaction, employee satisfaction and the relationship between customers and employees, with the overall aim of growing patronage. Responsibility for the success of the plan was shared by introducing a risk and reward arrangement.

Campaigns were launched with different themes including feedback, the environment, service and respect for others. These campaigns aimed to promote a better experience of bus travel and developed positive relationships between passengers and employees.

For example, during our 'Love on the bus' campaign, drivers were presented with cards and flowers on their birthday. A surprise birthday celebration for one bus driver, with passengers and musicians singing and celebrating, was captured on film. A clip posted on YouTube attracted attention from across the world with more than 2.5 million hits.

As well as raising awareness of the improved travel experience and better satisfaction and respect between passengers and drivers on a national scale, the initiative was successful in growing passenger numbers by seven per cent across five Arriva bus lines during 2010. Passenger numbers on the first line have risen by 32 per cent since 2008. The authority is now increasingly looking at passenger incentive agreements in contracts.



Bus

Liberalisation stage: mature

- Entered bus market in 1999
- 530 buses
- 1,650 employees

Our position

Arriva has grown its market share in recent years and now operates around six per cent of the buses in Sweden, with a strong base in the south of the country.

The market

Deregulation commenced in the 1980s and competitive tendering is now well established.

The 22 passenger transport authorities have responsibility for public transport services in the regions, including determining ticket prices, timetables and contract duration.

Contracts are typically gross cost and an average of eight years, with quality and service incentives and/or penalties.

Rail

Liberalisation stage: mature

- Entered rail market in 2007
- 74 train sets
- 500 employees
- 20 million train kilometres operated per annum

Our position

Arriva operates four rail contracts in Sweden. In 2011, Deutsche Bahn's local and regional services in the Östergötland province and inter-regional services between Umeå and Örnsköldsvik, (in partnership with Swedish Railways) became part of Arriva.

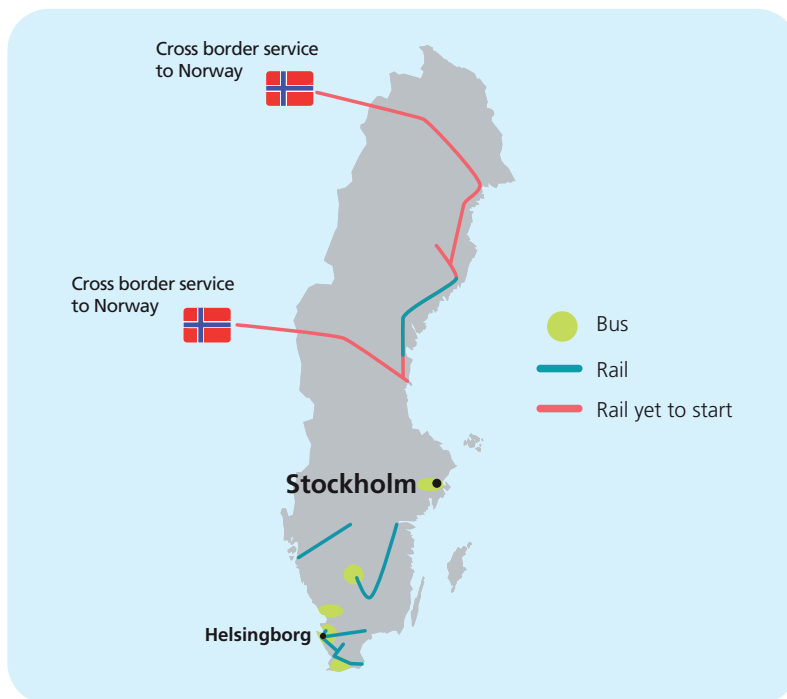
The market

The rail market is completely deregulated with no exclusive rights for tendered or long distance services.

Responsibility for regional rail passenger transport has been devolved to the regional authorities and there is widespread tendering of regional contracts in Sweden.

Regional rail contracts are typically gross cost and between seven and 10 years, with quality and service incentives and/or penalties. Inter-regional services tend to be net cost and longer, between 10 and 15 years in duration.







Rolling stock is normally provided by the contracting authority, with the operator responsible for employees and maintenance.



Successes

- In 2009 we became the first new entrant into the Stockholm bus market in more than 10 years. During 2010 Arriva was rated the most professional business partner in Stockholm by the client body, and we achieved excellent passenger growth of eight per cent in one year.
- Our rail business in Sweden is growing and our contracts are performing well. Since starting to operate the Pågatåg services in the Skåne region in 2007, we have recorded outstanding punctuality, rising to 99.96 per cent in 2010. Passenger satisfaction also continues to rise, reaching 7.3 out of 10 in 2010.
- Arriva Sverige excels in innovation, marketing and development, with recent projects focusing on attracting more passengers through events and promotions, together with bus prioritisation including the introduction of bus lanes. In Helsingborg, for example, we have grown passenger numbers by more than 50 per cent since 2005. Customer satisfaction has also increased, with eight out of 10 passengers scoring Arriva highly.

Key dates

	2011	Two Deutsche Bahn rail contracts, with phased introductions, became part of Arriva
	2009	Won an eight-year bus contract in the Halland region
	2009	Entered the Stockholm bus market
	2009	Began operating a second rail contract between Göteborg and Örebro
	2007	Started operating the Pågatåg rail contract
	1999	Started bus operations in Helsingborg

Excellent punctuality

Professional business partner

Strong customer satisfaction

Innovation

Attracting passengers



Bus

Liberalisation stage: mature

- ➔ Entered bus market in 1998
- ➔ 580 buses
- ➔ 10 waterbuses
- ➔ 1,550 employees

Our position

Arriva is one of the largest bus operators in the Netherlands, with approximately 12 per cent of the market.

The market

Around half of the market is competitively tendered, outside of the major cities. Amsterdam, Rotterdam and the Hague are yet to put concessions out to tender.

The 11 regional authorities have had responsibility for public transport since January 2001, when the Passenger Transport Act 2000 came into force. Regional authorities are obliged to organise public transport into concessions, which are periodically put out to tender by open procedure. Tenders typically focus on quality and the environment in addition to price.

Contracts tend to be net cost and of eight years duration on average. Contracts can include specified fleet requirements, for example maximum bus age.

Rail

Liberalisation stage: mid-liberalisation

- ➔ Entered rail market in 1999
- ➔ 58 train sets
- ➔ 300 employees
- ➔ 8.7 million train kilometres operated per annum

Our position

Arriva is the largest private rail operator in the Netherlands. We are the sole provider of regional rail services in Friesland and Groningen, Zuid-Holland, Overijssel and Drenthe, and also operate cross border services into Germany.

The market

Very little of the rail market has been competitively tendered to date and only around six per cent of the market is operated by the private sector.

Regional authorities have responsibility for regional rail services. Contract conditions differ widely between the regions, and by contract.

Contracts are typically net cost and up to 15 years in length.

Best performing
rail operator

**Integrated
transport**

Customers most
satisfied with Arriva services

Waterbuses



Successes

- Arriva is the best performing rail operator in the Netherlands. In 2010, our average punctuality rating was 97 per cent.
- The Ministry for Transport commissioned a survey of 90,000 public transport users in 2010, with Arriva ranking highest for both bus and rail, with an average satisfaction rating of 7.4 out of 10.
- Arriva has worked in partnership with the national government to introduce the 'OV-Chipkaart', a national smart card for integrated public transport use throughout the Netherlands.
- Integrated transport is a key feature of transport in the Netherlands. Arriva successfully operates a number of integrated transport contracts, including that for Achterhoek, won in 2009. The 10-year bus element of the contract in Gelderland got off to a good start in December 2010, and our teams are preparing to begin the rail element in 2012.

Key dates

	2012	The Vechtdallijnen 15-year rail contract is scheduled to start
	2012	Rail element of the Achterhoek contract is due to start
	2010	Started the bus element of the Achterhoek contract
	2006	Started operating a 12-year bus and rail contract between Dordrecht and Geldermalsen (DAV)
	2005	Started operating a 15-year rail contract for all regional services in Friesland and Groningen, and a cross border service into north Germany
	2002	Arriva was the first private operator to win a bus contract from a state-owned incumbent
	1999	Established joint venture with state-owned operator NS Rail, the first rail privatisation in the Netherlands
	1998	Acquired Veonn and Hanze, the first phase of bus privatisation of state-owned Connexion
	1998	Acquired Vancom Nederland, the first municipal bus privatisation



Bus

Liberalisation stage: emerging

- ➔ Entered bus market in 2002
- ➔ 2,360 buses
- ➔ 2 waterbuses
- ➔ 3,450 employees

Our position

Arriva is the largest private bus operator in Italy, operating approximately five per cent of the market. We run urban and inter-urban services in the north of the country, and airport connection services to Turin and Milan airports. We also run daily and seasonal waterbuses in Trieste.

The market

The opening of the bus passenger transport market is slow, and competitive tendering is not yet commonplace.

Bus services are currently highly subsidised, with low fares. Provincial or municipal local authorities are responsible for bus provision and setting fares (inside a general framework provided by the region), and public transport funding is provided nationally by the state. In some regions public private partnerships have been set up.

Where contracts are in place they are typically net cost.








There are a large number of local operators, mostly owned by regions and municipalities.

Successes

- ➔ Arriva's 100 per cent contract retention rate in Italy reflects our track record of excellent operational performance and improved levels of passenger satisfaction.
- ➔ In partnership with local authorities we have developed and introduced new technology, helping improve operating efficiency and customer satisfaction. For example, we have fitted buses in our SAF, SADEM and Trieste Trasporti businesses with GPS systems to monitor and manage the fleet, improving punctuality and information for passengers.
- ➔ In our SAF business, we developed a pilot project in collaboration with the Politecnico University of Milan called Best Driving Tutor, to introduce a driving style focused on reducing fuel consumption and CO₂ emissions, while promoting road safety. The project was presented at the World Expo 2010 trade show in Shanghai.
- ➔ A six-monthly customer satisfaction survey in Brescia, where our companies SIA and SAIA operate, shows consistent improvements with overall customer perception of services now scoring seven out of 10.



Key dates

	2011	Contracts in Friuli Venezia Giulia, operating in Udine and Trieste, extended until 2015
	2008	Acquired the remaining 20 per cent stake in SADEM, and subsidiary SAPAV
	2005	Acquired an 80 per cent stake in SADEM, plus an interest in subsidiary company SAPAV, both operating in the Turin area
	2005	Increased stake in SAF to 60 per cent
	2004	Invested in a 49 per cent stake in SAF's urban, inter-urban and contracted operations in Udine
	2002	Invested in subsidiary interests in KM and Trieste Trasporti
	2002	Acquired SAB's urban, inter-urban and airport bus services operating to the east of Milan

Rail

Liberalisation stage: yet to liberalise

The market

Early attempts at competitive tendering in the Italian rail market failed.

In 2010, Trenitalia, owned by Italian state railway Ferrovie dello Stato (FS) signed six-year service contracts for regional services in many areas, with six-year extension options.

Some regions, including Piemonte, have been considering market opening and Arriva will continue to monitor any market entry opportunities.

The current open access system is being challenged, potentially bringing change and opportunity.



Case study: innovative partnerships

The Friuli Venezia Giulia region in northern Italy has a city bus network in Trieste, with around 270 buses. The majority of the business is owned by the municipality. Arriva took on a 30 per cent holding in the Trieste urban operations through the acquisition of SAB in 2002, and invested in a further 10 per cent stake during 2005 and 2006.

We worked in partnership and built a strong relationship based on trust, and in 2007, despite being the minority partner, Arriva became responsible for managing operations. The partnership is working well to this day, with improved operational efficiency, better value for money for the municipality and high quality services for customers.

This approach appealed to the neighbouring area, Udine, where urban and inter-urban services were provided by 480 buses, owned by the municipality and a local transport company, SAF. When Arriva had the opportunity to acquire 49 per cent of SAF in 2004, the Mayor of Udine was supportive, having observed the then Trieste position. Over time, Arriva increased its stake in SAF to 60 per cent and is responsible for managing operations, bringing best practice operational expertise, economies of scale, innovation and strengthened financial discipline.

The Udine transport network and its customers have benefited from better quality services, with Arriva becoming the best performing urban operator.



Bus

Liberalisation stage: mid-liberalisation

- ➔ Entered bus market in 1999
- ➔ 450 buses
- ➔ 900 employees

Our position

Arriva is one of the larger private bus operators in Spain, however it is a fragmented market and our overall market share is still less than one per cent.

In Madrid, we operate approximately 14 per cent of the market. We also have operations in Galicia and Mallorca.

The market

The Spanish bus market is a concession-based market, with revenue risk and exclusive rights.

The urban bus market is operated by private and city-owned companies, while inter-urban and long-distance concessions are typically operated by private companies.

In Spain there are 19 autonomous regions, with legislative powers, including for transport. Long concessions, ranging from eight to 25 years have typically been granted, with exclusive rights. The regions set maximum fares and monitor the delivery of concession requirements by operators.

Where contracts are in place, in Madrid for example, they are currently gross cost with incentives and/or penalties. These are, however, moving towards passenger growth driven models.

The market is diverse and fragmented, with more than 4,000 small operators accounting for around 70 per cent of the market.



Successes

- Arriva Noroeste, in Galicia, was recognised as inter-urban operator of the year in 2009, based on an excellent operating performance and strong passenger satisfaction, and these good standards continue.
- In 2010, Deblas was the first company in Spain to receive accreditation under the UNE-EN13816 public transport quality standard for all its lines.
- In Madrid, we have introduced an Ecolite fuel economy system on 217 buses to reduce fuel consumption and improve environmental performance.

Key dates

	2009	Deblas contracts extended to 2024
	2008	Acquired Deblas, with contracted bus services in Madrid
	2007	Acquired Esfera, operating school bus services and private hire in Madrid
	2002	Acquired Autocares Mallorca and Bus Nord, covering the north and west of Mallorca
	1999	Acquired bus operations in Galicia, north west Spain

Rail

Liberalisation stage: yet to liberalise

The market

There has been no competitive tendering for rail in Spain, and the state railway company Renfe continues to operate all passenger trains.

The 19 autonomous regions are responsible for rail provision, with state funding providing for loss-making regional and urban services across the five regional and urban rail networks. The state has invested significantly in high speed lines. Private operators are beginning to become established in the rail freight market.



Case study: award-winning integration in Madrid

Arriva's approach to integration of new businesses has been publicly recognised in Spain with an award from the Madrid business community, citing an "exemplary transition".

The award was for the integration of Deblas, a business acquired by Arriva in 2008 with 600 employees and a fleet of 217 buses. It was presented by the Confederación Empresarial de Madrid (Business Confederation of Madrid), and the Chamber of Commerce and Industry of Madrid, in agreement with the Regional Unions of the Community of Madrid.

Consistent communications reassured stakeholders, within the Deblas business and our partners, municipalities and trade unions, that Arriva's focus was on stability and ensuring business continued as usual for passengers and employees.

This 'evolution not revolution' approach and Arriva's credentials as a public transport operator provided reassurance of our commitment to the business and the city's transport networks.

Our inclusive approach, empowerment of local management and adoption of the local culture of businesses working together as a family, helped gain the trust and participation of the unions who recommended Arriva for the award. The close working with the unions from the outset was an important contributor to the successful integration.

The award, for corporate and personnel excellence, recognised and celebrated the professional way the business maintained and enhanced workforce relations during the integration process, gaining the trust and participation of employees by living up to our commitments.



Bus

Liberalisation stage: mid-liberalisation

- ➔ Entered bus market in 2000
- ➔ 3,225 buses
- ➔ 6,550 employees

Our position

Arriva is one of the three largest bus operators in Portugal, with an interest in operations covering 30 per cent of the market.

Arriva has a 31.5 per cent stake in Portugal's largest public transport operator Barraqueiro.

The market

There is limited competitive tendering in Portugal. The inter-urban bus sector operates as a commercial market under licence. Concessions are typically long, ranging from 10 to 30 years, and have exclusive rights.

In Lisbon and Porto bus services are state owned. Bus services in other major cities are still municipally owned, with municipalities responsible for allocating routes by awarding licences to independent operators or delivering services directly. Fare increases are set by the government.

Metropolitan authorities have been established in Lisbon and Porto, with a view to introducing competitive tendering for bus contracts.

Rail

Liberalisation stage: emerging

- ➔ Entered rail market in 2006
- ➔ 18 train sets
- ➔ 126 trams
- ➔ 300 employees
- ➔ 10.5 million train/tram kilometres operated per annum

Our position

Arriva has an interest in the Portuguese rail market via Barraqueiro's rail operation Fertagus – the only private rail operator in Portugal.

We also have an interest in the Metro Sul do Tejo tram operation to the south of Lisbon and Metro do Porto, the city of Porto's tram network.

The market

There has been only one instance of a concession awarded to a private operating company to date (Fertagus), and there are early signs of further moves towards competitive tendering.











Urban and regional rail services are operated under concessions allocated by the state, to state-owned Comboios de Portugal (CP). State funding provides for loss-making regional and urban services.



Successes

- Arriva is recognised as a bus market leader in Portugal.
- We have professional employees and strong passenger satisfaction. In a recent survey at our Transportes Sul do Tejo (TST) operations in Lisbon for example, around 70 per cent of customers said that services met or exceeded their expectations, and 97 per cent intended to use our services again soon.
- We have invested in a new state-of-the-art, environmentally friendly headquarters and depot in Guimarães.
- Fertagus has developed an excellent record of strong operational performance. Our punctuality record is 99 per cent, and passenger satisfaction is also strong, rating at four out of five, contributing to patronage growth of two per cent in 2010. As the only private rail operator in Portugal, this positions us well for future rail opportunities.

Key dates

	2011	Fertagus contract extended until 2019 as the first non-subsidised regional rail operator
	2010	Started operating the city of Porto's tram contract, Metro do Porto
  	2008	Invested in a further 10 per cent interest in Barraqueiro, taking our total stake to 31.5 per cent
 	2006	Acquired a 21.5 per cent stake in Barraqueiro
	2003	Purchased remaining 49 per cent of TST
	2002	Invested in 51 per cent of TST, a private bus and coach operator in and around Lisbon (from Barraqueiro)
	2000	Acquired four family-owned bus companies in the north west of Portugal



Case study: operating and maintaining light rail

The City of Porto's tram network, Metro do Porto, was built between 2002 and 2006, combining new construction in the city with the conversion of some sections of disused and under-used narrow gauge railway alignments.

The ProMetro consortium, of which Arriva and Barraqueiro are key members, won the five-year operation and maintenance concession when it was re-tendered in 2010. The successful bid focused on our pan-European transport operator credentials and provided significant savings to the Portuguese government compared to the previous concession.

The consortium operates a fleet of 102 trams to provide more than 50 million passenger journeys per annum over 6.9 million tram kilometres, with service frequencies of between five and 15 minutes on weekdays, increasing to between three and 10 minutes during peak periods.

Following the opening of a new short line at the beginning of 2011, the light rail network is 67 kilometres in length, eight kilometres of which is underground. We currently serve 80 stations and provide services for six municipalities within the metropolitan Porto area: Porto, Maia, Matosinhos, Póvoa de Varzim, Vila do Conde and Vila Nova de Gaia, and also Porto airport. We will work with the local authority to open two further small extensions in the next four years.

Under the terms of the concession, the consortium also provides maintenance of rolling stock and infrastructure, security and cleaning. The consortium successfully mobilised the contract in just four weeks, in time to start operations on 1 April 2010.

A survey in November 2010 showed strong passenger satisfaction of 77.2 per cent, an improvement on that recorded by the previous operator.



Bus

Liberalisation stage: mid-liberalisation

- ➔ Entered bus market in 2006
- ➔ 250 buses
- ➔ 400 employees

Our position

Arriva has built a position in three regions around Prague.

The market

Direct award of contracts and concessions is common. Competitive tendering is limited but is expected to increase.

The market is very fragmented following privatisation. Regional governments control concession awards, licensing and maximum fares, while individual cities are responsible for urban public transport.

Cost-plus subsidy contracts are operated with each having different validity periods.



As old agreements finish, the first signs of tendering are appearing. To date this has been in areas outside our operation.

Around 250 bus companies currently operate in the market, many of which were formed in the 1990s as part of privatisation.

Successes

- ➔ We have established a strong market position around Prague, providing a platform for future growth.
- ➔ EcoManager trials have been introduced in our Bosak Bus business to help improve fuel efficiency and improve the environmental performance of the fleet.

Key dates

	2007	Acquired Bosak Bus and Osnado Spol
	2006	Acquired Transcentrum Bus

Rail

Liberalisation stage: emerging

The market

The Czech Republic rail market is dominated by the state, with the state also responsible for rail provision and funding.

State-owned rail operator, České dráhy (CD) operates 100 per cent of the long distance market, and the majority of regional services. In 2009, the state extended the majority of CD's contracts for a further 10 years, however tendering opportunities are expected to emerge from 2011.

Denmark | Sweden | Netherlands | Italy | Spain | Portugal |

Czech Republic | **Poland**  | Hungary | Slovakia | Malta | Business development

Rail

Liberalisation stage: emerging

- ➔ Entered rail market in 2007
- ➔ 22 train sets
- ➔ 150 employees
- ➔ 2.5 million train kilometres operated per annum

Our position

Arriva was the first private company to operate passenger rail services in Poland. Our operations are in the north-west of the country.

The market

The rail market in Poland is dominated by state and region-owned operators, however it is opening slowly to competitive tendering.

Regional rail provision has been devolved to the regions, while state-owned PKP remains responsible for mainline rail operations.



Przewozy Regionalne (PR) is owned by the 16 Voivodships (provinces), which decide whether to direct award rail services to PR or put services out to tender in their regions.

Contracts are typically net cost contracts. Where previously they were between one and three years, there has been a recent move, in some regions, towards longer 10-year contracts.

Successes

- ➔ In 2010 Arriva retained its work in the Kujawsko-Pomorskie region and was awarded a 10-year contract reflecting its strong operational performance, with excellent punctuality of more than 95 per cent. Four new train sets will be introduced in 2012.

Key dates

	2010	Awarded a 10-year regional rail contract
	2007	Entered a joint venture with PCC Rail for a three-year contract (becoming the sole owner in 2010)

Bus

Liberalisation stage: emerging

The market

Regional authorities can award bus contracts by tender or direct award, with competitive tendering not commonly used outside Warsaw.

State-owned companies operate rural, inter-urban and long distance services. Municipal bus operators run buses in towns and cities.

Some cities are moving towards the creation of tendering authorities.

Contracts tend to be gross cost in city operations, ranging from two to six years, whereas regional services operate on a commercial basis.

The market is dominated by 167 state-owned companies and 140 municipal operators.



Bus

Liberalisation stage: yet to liberalise

- ➔ Entered bus market in 2008
- ➔ 225 buses
- ➔ 450 employees

Our position

Arriva is the largest private sector bus operator in Hungary as part of a joint venture, VT Transman. The market is highly fragmented and our market share is around one per cent.

The market

Contracts with exclusive rights may only be awarded to an operator selected by a tendering procedure. However, the Volan companies, the 24 state-owned regional operators, dominate the market. There are also six municipal operators.

The national government is responsible for regional public transport, covering suburban and intercity operations. Services are provided by the Volan companies under contracts which extend until 2016.



Municipalities are responsible for local public transport. Contracts are typically gross cost or cost-plus, and are generally entered into once a year, although this can be longer in some areas.

The city of Budapest is planning to competitively tender a number of bus contracts in the city.

Success

- ➔ Arriva has developed a strong working relationship with the Budapest city operator, successfully providing sub-contracted services and responding rapidly to changing fleet requirements. Arriva will respond to any new tender opportunities offered by the city transport authority.

Key dates

	2009	Acquired remaining 20 per cent of Eurobus
	2008	Acquired 80 per cent of Eurobus, a bus operator in Hungary and Slovakia

Rail

Liberalisation stage: yet to liberalise

The market

There is no competitive tendering in the Hungarian rail market as yet.

Rail is the responsibility of the national government and is funded by the state.

Denmark | Sweden | Netherlands | Italy | Spain | Portugal |
Czech Republic | Poland | Hungary | **Slovakia** 🇸🇰 | Malta | Business development



Bus

Liberalisation stage: mid-liberalisation

- ➔ Entered bus market in 2008
- ➔ 565 buses
- ➔ 1,000 employees

Our position

Arriva is the largest private sector bus operator in Slovakia, with a 60 per cent interest in two SADs – the former Slovak Bus Service operators.

These are SAD Nové Zámky in the south west and SAD Michalovce in the east.

The market

Competitive tendering is underway in this market, with tendering opportunities expected to emerge in 2011. Less than five per cent of the market has been competitively tendered to date.

The regions are responsible for public transport provision and funding.



Contracts are gross cost and between one and 10 years in length, with exclusive rights.

The competitive landscape is dominated by 17 SADs, which operate in different regions. All SADs are partially privatised, with public stakes, typically of 40 per cent. There are also five municipal/city-owned operators.

Success

- ➔ Arriva has developed strong relationships with client bodies and has successfully secured contract extensions of up to 10 years.

Key dates

	2009	Acquired remaining 20 per cent of Eurobus
	2008	Acquired 80 per cent of Eurobus, a bus operator in Hungary and Slovakia

Rail

Liberalisation stage: yet to liberalise

The market

Tendering opportunities are arising in regional rail. The central government is responsible for rail provision and funding. Passenger rail services are provided by state-owned Slovak Railways.



Bus

Liberalisation stage: mature

- ➔ Market entry in July 2011
- ➔ 265 buses
- ➔ 900 employees

Our position

The Arriva consortium, with local partner the Tumas Group, was awarded a contract to operate all scheduled bus services in Malta from 3 July 2011, making us the sole provider of scheduled bus services on the island, and its sister island Gozo.

The market

The transport system in Malta was previously operated by independent bus owners. The Maltese government has put in place a significant market reform, moving from a 1950s system to modern day - from an emerging liberalisation stage to mature - in one step change.

The national government is responsible for public transport, including network and service provision, and maximum fares and fare structure.

The public transport contract awarded to Arriva is the first of its kind in Malta. The 10-year contract for the exclusive operation of scheduled services is highly specified to meet the government's requirements for a new bus network.

Arriva is delivering this reform at the same time as providing significant savings to the Maltese government, compared to the previous transport system.

Successes

- ➔ Arriva was selected as the operator with the right credentials to put in place a once in a lifetime public transport transformation.
- ➔ Preparations included recruiting all employees, building new depots, putting in place the systems and processes required for the smooth running of operations, and placing orders for new buses. Some 70 per cent of the fleet is new and includes 174 buses manufactured to Arriva specification in China.
- ➔ We have also invested in a comprehensive innovative real-time information and technology package, which will contribute to the significant passenger benefits we are bringing to Malta. The fully integrated system includes real-time control of buses, real-time passenger information feeds and displays, electronic ticketing, CCTV, passenger counting and the barrier and ticket management of three park and ride sites.

Key dates

 **2011** Market entry via contract win

Rail

There is no rail market in Malta.

Denmark | Sweden | Netherlands | Italy | Spain | Portugal | Czech Republic | Poland | Hungary | Slovakia | Malta | **Business development**

Transport market liberalisation across mainland Europe and beyond provides opportunities for transport authorities and transport operators to benefit from working with Arriva, in countries where we currently operate and new territories.

Every day we are in contact with private and public businesses and national, regional and local governments across Europe, letting people in the transport industry know that we want to do business with them, and that they can benefit from our skills and experience.

Arriva has the benefits of being a large business, with pan-European transport expertise, while being a local business wherever we operate. We combine strategic vision with attention to detail, while championing and sharing best practice.

As part of the Deutsche Bahn group, we will be working together with Deutsche Bahn's international operations which are active in infrastructure projects worldwide.

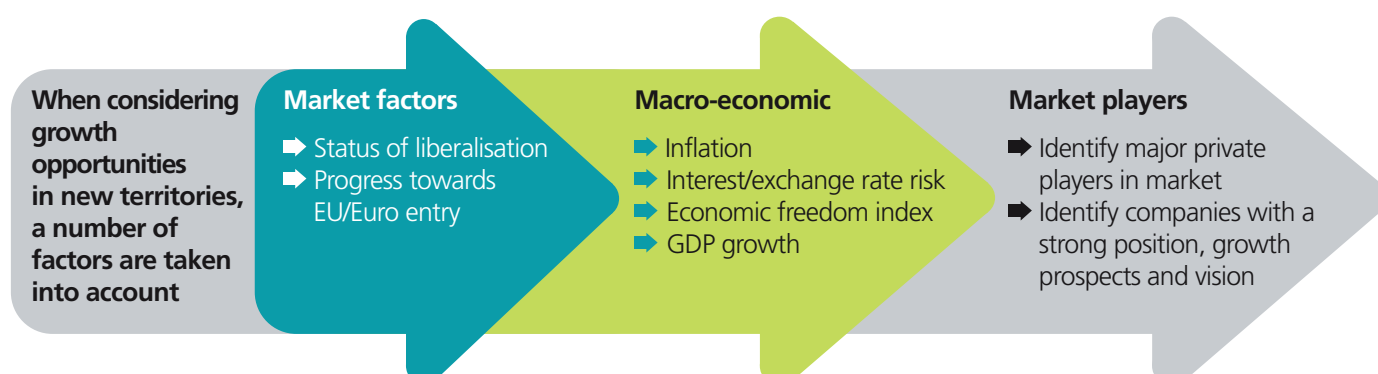
What we do

We look for opportunities where bidding or acquisition brings:

- early mover advantage - we like to enter markets early, build our position gradually and use our transport experience to help shape developments from within
- partnership opportunities - we are at our best when working closely with tendering authorities to help guide through and deliver change, and develop tailored, value for money transport solutions
- geographic advantage - we look to develop operational hubs enabling synergies and cost efficiencies
- local connections - we believe in having local management teams in place wherever possible, supported by the Arriva group
- flexible approach - we have a successful track record of local partnerships, through joint ventures or investment.

We bring many benefits

- An in-depth understanding of different political and regulatory environments.
- Experience of operating networks of all sizes, and a track record of commercial success under many different business models.
- A proven track record of improving services and attracting more passengers, as well as consistently growing customer satisfaction.
- A successful local partnership approach focusing on transport planning, developing services and providing integrated win-win solutions.
- Talented people practised in implementing leading edge technology and innovation, and transferring best practice across borders.
- The support of a unique network of businesses and contacts.
- We deliver what we say we will deliver, and consistently provide value for money.



Our approach

Arriva is committed to raising awareness of corporate responsibility across our business, sharing experiences and facilitating the exchange of best practice.

With services across Europe transporting millions of people, the social and environmental impact and effect of our operations are of interest to our employees, customers and other stakeholders.

We are committed to behaving responsibly and being a pioneer of climate friendly and environmentally sustainable public transport.

We work to strengthen our environmental stewardship and ensure appropriate corporate governance and responsibilities are integrated into our everyday business practice. We report on them using four key themes: safety, employees, environment and community.

- ➔ **Safety** Putting the safety of our people and customers first
- ➔ **Employees** Supporting and developing our people
- ➔ **Environment** Reducing the impact of our operations
- ➔ **Community** Being an active local partner

Our corporate responsibility committee, led by Bob Holland, an executive director and managing director of our Arriva UK Trains division, oversees the group's corporate responsibility policies and performance. The committee includes senior managers from across the group.

We do not make political contributions or donations. Our code of business conduct sets out our expectations of employees, agents, subcontractors and suppliers, and our comprehensive policies govern our impact on society and ensure we operate in an ethically sound way.



Safety
Environment
Customers
Responsibility
Stakeholders
Employees

Safety

Providing safe transport services for our customers and a safe working environment for our people is our top priority. Embedded in our operational procedures and the culture of our business, safety underpins everything we do and there is accountability at every level.

Our health and safety committee, chaired by director of human resources Alison O'Connor, reviews and monitors safety performance and reports to Arriva's executive committee, which in turn reports to the main board.

We ensure appropriate resources and support are provided to maintain high standards of safety, with monitoring and review systems and clear communication to reinforce its importance across our business.

Managing directors across the group are responsible for ensuring their company's approach to health and safety complies with local legislation and is regularly reviewed and updated. Each business operates a safety management system and ensures potential health and safety risks are identified, assessed and appropriately managed.

In 2010 we set up a European health and safety forum which continues to provide an important environment to share safety management best practice and report across the group.

Safety first

We keep our people, passengers and services safe by ensuring employees and contractors undergo comprehensive training.

From safety theory and driving regulations to accident analysis and vehicle maintenance, our training programmes keep our people focused on the importance of working safely.

In the UK and mainland Europe safety training is an essential part of the professional competence courses we run for all bus drivers.

Across our operations we carry out practical training sessions to help drivers experience different road or rail conditions and practice vehicle control and emergency braking.



Many of our operations hold major incident exercises which successfully test business, local municipality and emergency service responses to mock accidents and emergencies. They provide valuable feedback to improve agency collaboration and response plans.

We increase safety awareness through a range of approaches. Some examples are below.

- Arriva North West, UK, launched 'Target Zero – Safe Driving, For Life', a campaign to reduce incidents by promoting safe driving and greater awareness of other road users. Through newsletters, posters, depot information screen messages and our Target Zero Safe Driving Awards we keep safety at the forefront of our people's minds.
- Arriva Nederland worked with students from 18 countries, setting the challenge of 'How to make safety cool'. The ongoing initiative, with partners including Hanze University and Groningen International Business School, helps generate ideas to communicate safety messages. We also collaborated with students researching safety and sustainability in public transport in the Netherlands and China for their dissertations. The final reports were shared with Arriva to support future campaign development.
- In 2010, Arriva North East, UK, was commended by the Royal Society for the Prevention of Accidents (RoSPA) for its management of occupational health and safety. The award, which exceeds the previous Gold awards achieved by the business, recognises work to reduce employee accidents by introducing bus depot safety zones, safety champions and innovative branding for health and safety literature. RoSPA also praised the business for its employee engagement.
- Tyne and Wear Metro, UK, is carrying out a safety campaign which includes improving station signage and producing passenger leaflets on safety and Metro bylaws.
- In Italy, we support the 'Easy Foot' public and road safety initiative with on-bus cameras relaying safety, road conditions and traffic information to Udine local authorities. We also carried out a 'Moving free and safe' campaign to promote leisure travel.
- Arriva Trains Wales, UK, has introduced a Safety Action Tracking system which provides automatic reminders to assist in monitoring safety critical aspects of the business.



Protecting our passengers and employees

Arriva is committed to creating a reassuring and safe environment for our customers and employees.

We work with local and transport police forces, local authorities and other stakeholders across Europe on initiatives to deter crime and anti-social behaviour and make public transport a safer, more pleasurable experience.

Many of our vehicles and train stations across Europe have CCTV which helps deter crime, anti-social behaviour and fraudulent insurance claims. In the Netherlands we were the first operator to have CCTV on all of our buses and more than 88 per cent of our UK bus fleet carries the technology. In Wales, rail security staff and transport police at Swansea, Pontypridd and Newport wear hands-free cameras.



Other safety advances and initiatives to help protect our passengers and employees

- ➔ Arriva Trains Wales, UK, is part of a groundbreaking project to deliver the first trial of the **European Rail Traffic Management System** (ERTMS) on the UK rail network. ERTMS continuously monitors train speed and automatically applies brakes if speed limits are exceeded.
- ➔ In the Netherlands we have a police officer seconded to act as the **main liaison point with the local police** to ensure stronger collaboration. This was inspired by a similar approach at our Arriva North West bus operation in the UK.
- ➔ In Denmark we worked with wireless internet provider Gratis to provide train passengers in Jutland with free internet access, a bespoke TV channel, **security cameras at all stations**, and the most advanced traffic information system in the country.
- ➔ Arriva Southern Counties, UK, is leading the way through consultation with its workforce. As part of its **'keep each other safe' initiative** unions attend regular health and safety meetings and are involved in workplace safety inspections.
- ➔ Since 2006 all new buses in Denmark carry alcohol locks which ensure **only drivers who provide a negative breath test** are able to start their vehicle.
- ➔ CrossCountry participated in the Rail Safety Standards Board **Safety Culture Survey 2010**. It matched the industry-leading index in three categories and received the highest rating possible.
- ➔ Arriva Yorkshire, UK, has launched a **'Shhh!' campaign** to highlight how playing personal music too loud disturbs fellow passengers and can damage hearing. Passengers participated in a short film for YouTube and can show support for the campaign on Facebook.
- ➔ A project for **helping visually impaired people travel by bus** has been developed in Trieste Trasporti, Italy. An infrared system called 'Talking Signs' emits infrared signals providing the direction to follow. It has been fitted on board 177 buses and the system also gives next stop information.

Excellence in maintenance

All of our businesses have strict engineering maintenance and inspection programmes in place. They include stringent safety checks which underpin the reliability and mechanical safety of our vehicles.

For two years running our CrossCountry rail business has won the prestigious Golden Spanner award for operating one of the UK's most reliable fleets. The award recognises our class 220 Voyager fleet as the most reliable trains in their class.

We have introduced an Engineering Excellence programme to ensure our depots are well managed, safe working environments. The programme, which actively involves employees, is being rolled out across Arriva UK Bus and parts of our mainland European operations.



Employees

Our 47,500 people, working across 12 countries, are the backbone of our business. With a diverse range of backgrounds and cultures, they bring a wealth of experience and quality to Arriva and reflect the customers and communities that we serve.

By valuing difference we offer a progressive working environment for our people and make Arriva an appealing opportunity when it comes to attracting future employees.

Our commitment to diversity was recognised with a Growth through Diversity award from the Danish Integration Ministry for Arriva Danmark's 'Better Bus Ride' project. The project makes bus travel more attractive and focuses on diversity by using employees' different cultural backgrounds as a way to improve job satisfaction and passenger experience.

We recognise that we are an important employer in many local communities and offer competitive pay and benefits reflecting local market conditions.

We develop constructive partnerships with our employees, trade unions and works councils. The majority of our workforce is covered by collective arrangements on working conditions and we make provision for employee representatives to receive appropriate training and fulfil official union business.

Our European works council provides a formal group-wide update on operations and business performance for employee representatives and is a valuable forum for sharing best practice.

Listening to our people

Arriva provides a respectful, supportive working environment and recognises that listening to our people is essential.



We encourage two-way employee engagement and communicate with our people through newsletters, briefings, open forums, suggestion schemes and road shows.

At Chiltern Railways, UK, we are using a private online social networking group to improve communication with employees who don't have access to e-mail at work.

We also carry out a group-wide employee survey to benchmark employee satisfaction.

In our most recent survey:

- ➡ 62 per cent of employees participated – an eight per cent increase on the previous survey
- ➡ 73 per cent agreed with the statement 'I am satisfied in my current job' – 11 per cent up on the last survey
- ➡ 69 per cent agreed that they were proud to work for Arriva, representing a seven per cent increase.

Below The Arriva graduate website



Join our journey

We work to make Arriva and the wider transport industry a career of choice. From bus depot to boardroom our professional recruitment processes ensure we have the right people for our business.

Our graduate programme continues to grow with successful initiatives in many of our countries. We attract talented, ambitious graduates through our website – www.arrivagraduate.com.

Our graduate programme is tailored to meet business needs while developing our people. We offer 18-month development programmes in general management and engineering management.

They comprise a mix of on and off-the-job training, mentor coaching and regular performance and development reviews. Where possible, we link our engineering programme with professional accreditation.

The programmes equip our graduates with the skills and experience to become our future leaders, take Arriva forward and deliver operational excellence.



A graduate's journey

Graduate

Kim Purcell

Programme

General management, Arriva UK Bus

Arriva journey

As a graduate trainee Kim carried out a range of roles from driving buses to supporting the commercial and HR functions at Arriva North East's head office.

Aged 24 she became Arriva's youngest, and first female, bus depot manager and has since been promoted to head of service delivery at Arriva Scotland West.

Diverse
Quality
Opportunity
Valuing difference
Delivery
People
Training
Excellence



Developing our people

Identifying, developing and retaining talent is vital to Arriva. We ensure our people have the training and development needed to fulfil their potential and contribute to our business.

Our group-wide succession planning helps us identify and develop individuals for future management positions. Arriva's inclusive approach to training and development also means opportunities for all employees to maximise their potential.

Across Europe we provide a range of programmes, apprenticeships and learning resources and look for innovative ways to deliver training:

- ➔ Arriva Southern Counties, UK, has built a 'Technical Training Bus'. The mobile classroom has interchangeable engineering component panels and travels around depots delivering training programmes
- ➔ in the Netherlands and UK we have used actors to bring communications training to life
- ➔ our Arriva iLearn website provides training resources and development information across our European operations.

Our commitment to teamwork and developing our people to boost business performance is demonstrated through many of our depots achieving, and maintaining, Investors in People accreditation.

Above Arriva Yorkshire celebrates Investors in People accreditation



Left Arriva employees celebrate a combined 345 years of service

Below Health promotion campaign by Arriva in Italy



Right Commitment to a healthy workforce secured an award for Arriva Buses Wales



A positive working environment

We provide a positive working environment for our people which helps us retain a strong workforce.

We have many long serving employees across the group and over the last two years our overall employee retention rate has remained broadly consistent at 92.6 per cent. Our employee attendance rate remained the same at 95.3 per cent.

Ensuring wider employee welfare is important to our business. We invest in our leaders, managers and supervisors as they play a vital role in providing a positive, safe and healthy working environment. In Spain and northern Portugal we have started a coaching programme to help our leaders enhance their management skills.

We also invest in our facilities. Our latest flagship sites in Italy, Portugal and the UK showcase this commitment and offer improved workplaces for our people.

Having a healthy workforce is important and we are involved in initiatives to support our

employees and encourage good health in the workplace. Arriva Buses Wales, UK, has won a bronze Healthy Working Wales award for its commitment to investing in and improving the health and wellbeing of its workforce. It secured the award by:

- participating in a not-for-profit food co-operative so employees can purchase fresh fruit and vegetables from local farmers
- securing funding for mountain bikes for an employee cycling club
- holding health check days and healthy heart, smoking cessation and alcohol awareness campaigns.

Arriva Denmark has received certification from the Danish Corporate Athletic Association for its work on health issues among employees, particularly bus drivers. It is now the largest company in Denmark to be given the two-year certification after focusing on improving the health of its employees in five key areas: smoking, alcohol, stress, exercise and a healthy diet.

Environment

Transport by its nature has an environmental effect and in today's increasingly mobile society our services play an important role in reducing the overall impact. Arriva promotes the development and increased use of public transport to our customers and stakeholders across Europe.

We believe that offering well run services can encourage more people out of their cars and reduce road congestion. With fewer cars on the roads there are less emissions, more efficient fuel usage and public transport becomes more reliable, reinforcing it as an attractive journey choice.

As an operator of large vehicle fleets we recognise our responsibility to mitigate the environmental impact of our own operations. Inevitably the highest area of environmental impact is greenhouse gas production and air quality from exhaust emissions. We look to minimise our impact through fuel efficiency measures, alternative fuels and fleet improvements.

Across the group we continue to increase the number of Euro IV, Euro V and Enhanced Environmental Vehicles, which meet more stringent environmental standards, and reduce the number of vehicles which meet the older Euro I and Euro II environmental standards.

Operating a group of our scale, with hundreds of offices and workshops, means our environmental impact stretches beyond our vehicles. We encourage our businesses to minimise their impact where possible through energy saving measures at facilities, water conservation, waste recycling and reducing business travel through the use of video, web and audio conferencing.

Our environmental management system sets out framework policies for all our businesses. These include self-audit and self-certification policies that require a senior manager in each company to take personal accountability for consistent management of environmental standards and performance.

Environmental considerations are an increasing priority among many tendering authorities with many looking to Arriva to offer solutions. We recognise this and our expertise means we are well placed to develop and deliver contracts to high environmental standards. We also work to influence authorities to introduce bus lanes and traffic signal systems that prioritise public transport.

Greenhouse gas reduction

Reducing our like-for-like greenhouse gas (GHG) footprint by 15 per cent, between 2006 and 2012, remains a priority for the group.

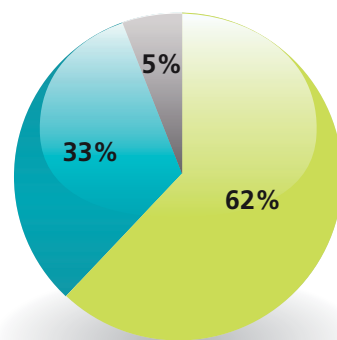
We compare our CO₂ equivalent (CO₂E) against group revenue in real terms to normalise GHG emissions into a meaningful comparison. We announced our target in 2008, and by the end of 2010 we had delivered a 14.5 per cent reduction.

Since 2006 we have reported our performance against our GHG reduction

target through the Carbon Disclosure Project (CDP). Our returns are available at www.cdproject.net.

Our absolute GHG emissions in 2010 were 1,361,102 tonnes CO₂E - a decrease of 174,585 tonnes compared with 2009.

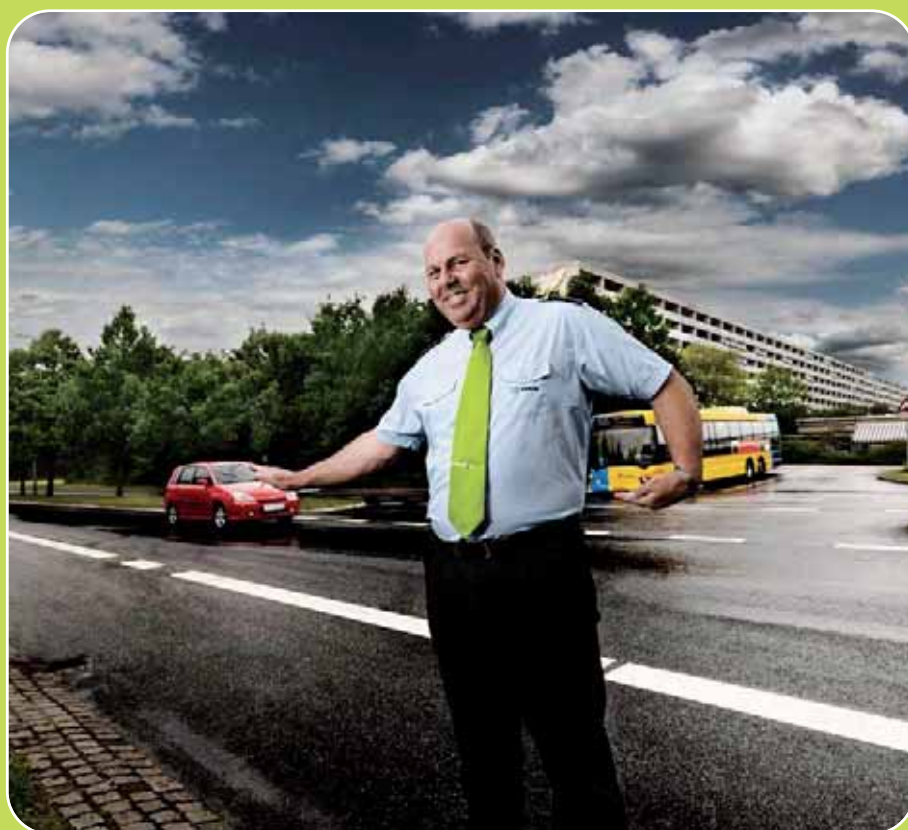
The reduction reflects the separation of our German operations from the group in August 2010 in preparation for its subsequent disposal, alongside other changes in operations and efforts to reduce emissions.



Emissions by source*

- Bus fleet
- Train fleet
- Other

*Does not include businesses transferred from Deutsche Bahn to Arriva in January 2011



Promoting the environmental benefits of public transport

- Arriva is the first UK bus operator to partner **Ice** – an innovative loyalty programme which rewards customers for making sustainable and environmentally friendly choices.

Arriva UK Bus customers can collect Ice reward points when buying Saver tickets through www.myice.com. They can also use their Ice reward points collected through other sustainable purchases on the site to buy future bus tickets.

- Arriva Trains Wales launched a **'Travel Greener'** campaign aimed at promoting the environmental credentials of rail travel compared with the car.
- Arriva Danmark's successful **'I love my bus'** campaign (left) worked to change perceptions of bus travel and encourage more people to leave their car behind and choose the bus to travel to work.
- Arriva UK Bus is working with other major UK bus operators as part of the national **'Greener Journeys'** initiative. The campaign aims to take one billion car journeys off UK roads, transferring them to buses and coaches, by 2014.

The initiative complements our marketing campaigns to promote the environmental benefits of public transport and encourage modal shift.



Eco-driving

Our eco-driving initiative is successfully expanding across Europe.

More than 8,300 of our buses in Denmark, Italy, the Netherlands, Portugal, Sweden, Spain and the UK carry eco-driving technology. We are also exploring its introduction in the Czech Republic and Hungary.

The technology gives our drivers real-time feedback through a dashboard-mounted LED which runs from green through amber to red indicating fuel consumption to help them adjust their driving style.

It is supported by a comprehensive training programme to help drivers adopt a progressive driving style. They learn how to optimise fuel consumption through better traffic anticipation, braking and acceleration techniques.

In addition to providing fuel savings and reducing emissions, it promotes smoother driving for our customers and helps provide more comfortable and safer journeys.

In Sweden our CO₂ emissions have been reduced by 13.7 per cent from 2008 to 2010 by investing in new environmentally friendlier buses and eco-driving technology.

The concept of eco-driving is also being adopted by some of our rail operations. In the UK, the Tyne and Wear Metro has installed the FASSI Driver Assistance System to provide real-time route information so drivers can drive more economically. Arriva Trains Wales and CrossCountry have trained staff in progressive driving techniques. Arriva Trains Wales estimates that the practice, combined with engine modifications, has potentially saved more than 1,500 tonnes of CO₂ since 2008.



Above Eco-driving dashboard LED

Eco-efficient facility management

We look to reduce the amount of waste produced and energy used by our different facilities across Europe.

In the UK, we were one of the first transport operators to register for the Carbon Reduction Commitment (CRC) Energy Efficiency Scheme to look into our energy consumption and how it can be reduced in the long-term.

As part of CRC, Arriva UK Bus and Arriva Trains Wales have each received the Carbon Trust Standard for significantly reducing their carbon footprint. Arriva UK Bus has reduced its carbon emissions by four per cent over the past three years, which equates to almost 20,000 tonnes of CO₂ equivalent (CO₂E), through considerable investment in fleet modernisation, bio-fuels, and EcoManager. During the same period Arriva Trains Wales' customer service and fleet management functions have reduced carbon emissions by 0.5 per cent which equates to 50 tonnes of CO₂E.



We have many examples of how we manage our facilities to reduce our environmental impact.

Above left Solar panels at Arriva in Udine, Italy **Above middle** An electric bus in Copenhagen, Denmark **Above right** London's first hybrid double deck bus

- TST in Portugal, in partnership with Barraqueiro's Rodoviária de Lisboa, has introduced new solar powered electronic information panels at main bus stops on its network to provide real-time information.
- A rainwater harvesting scheme operates at Arriva Trains Wales' Canton Depot, UK, for use in flushing train toilets.
- In Spain, Esfera's bus depot in Madrid has solar panels on its roof and sells power back to the national grid.
- Tyne and Wear Metro and Arriva Trains Wales carry out campaigns to encourage employees to look for ways to reduce their energy use at work and at home.
- Our new facilities in Udine, Italy, and Guimarães, Portugal, were built with the aim of reducing our environmental impact. They have solar panels, sensor activated lighting which responds to movement and natural light levels, water harvesting and recycling facilities for bus washing. In Udine the concrete hard standing areas are constructed with special cement which helps break down exhaust gases from our vehicles.
- We use wind turbines to generate power at our Moita and Machynlleth depots in Portugal and Wales.
- Across many of our offices we operate recycling schemes. In Spain we have special equipment which cleans and sorts rubbish removed from buses for recycling. Our contracted cleaners are encouraged to recycle as much as is practicable. Specialist cleaners dispose of waste from engineering depots.

From our London Overground rail operations to the Esfera bus business in Madrid, many of Arriva's businesses have successfully achieved ISO14001 certification. The Environmental Management System standard is increasingly welcomed by tendering authorities as it demonstrates our quality environmental management practices.

Future transport and fuels

Arriva works with leading vehicle manufacturers and suppliers and seeks to influence future designs.

We encourage the creation of alternative engineering solutions to ensure future vehicles are lighter, and more economical, without compromising advances in safety and comfort.

We have a wide experience of biofuels and work with contracting bodies, where public policy regimes are supportive, to trial and introduce alternative fuels and traction technologies.

- In partnership with local authorities, we have introduced the first - and only - **electric buses** in Denmark in central Copenhagen. We also operate electric buses in the Netherlands.
- In southern Sweden, we use a mixture of natural gas and biogas made partly from organic waste to fuel our buses in Helsingborg and Malmö. We are also part of a pilot with the national transport authorities introducing 10 biogas fuelled buses in Copenhagen. In Stockholm we operate 43 buses fuelled by **E95 bio-ethanol**, derived from sugar cane, other crops and waste wood cellulose.
- In Dordrecht, the Netherlands, Arriva has introduced buses fuelled by **bio-methane gas** generated from sewage waste.

Arriva has played a leading role in introducing **hybrid buses**, which reduce CO₂ emissions using a combination of an electric motor and a small diesel engine.

We successfully trialled, with Transport for London, the world's first hybrid double deck bus. We also operate hybrid buses in Denmark and the Netherlands and will introduce the first ever hybrid buses to Malta, with 10 joining our fleet in 2011.

Community

Our services are at the heart of thousands of communities across Europe. We make it possible for millions of people to go about their daily lives - linking towns and cities, homes to workplaces and people with their leisure activities. It is essential we understand and listen to the communities we serve so we can shape services to suit local needs.

Listening to and linking communities

Our people work with a range of agencies, partners and community groups every day to deliver local transport solutions.

Open days and customer surveys are just some of the ways we work to understand the needs and aspirations of the different communities within which we operate.

Our open days give customers, local communities and key stakeholders an insight into our business and investments in services and facilities.

Examples of how we work to strengthen links and deliver solutions in the communities we serve include:

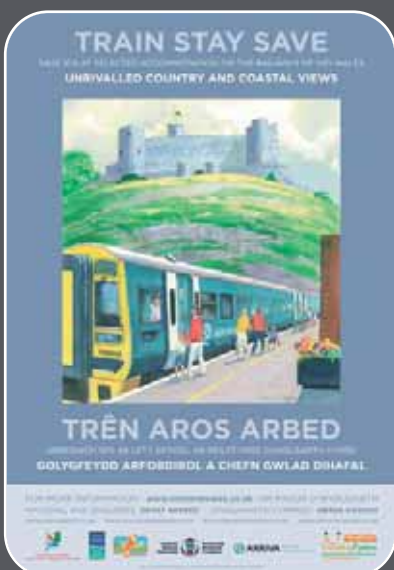
- Arriva North West, UK, ran an award-winning campaign with St Helen's Chamber of Commerce. Together we identified a new bus service for Haydock Industrial Estate where transport links for workers were poor. We introduced a new service timed to match shift patterns, resulting in more people choosing public transport
- our Italian bus company, SAB Autoservizi, supported the Italian Army's National Alpine Parade in Bergamo in strengthening services to help accommodate the transport needs of the half million attendees
- in the UK, our Chiltern Railways and Tyne and Wear Metro businesses hold regular 'Meet the Manager' events to encourage passengers, local residents and business communities to bring ideas and queries to our attention
- Arriva UK Bus is working with the Manchester United Foundation and Salford Community Health to deliver health services in the community. The 'Health Drive Bus', fitted with state-of-the-art equipment, supports health campaigns and provides services in a convenient mobile unit. Arriva donated the vehicle and has committed to providing drivers, fuel and maintenance for the three-year project
- our customers in western Denmark participated in a trial of different bus types. Their feedback is helping us shape future bus tenders
- Arriva created the award-winning 'Adopt a Station' concept which many other UK rail operators have now replicated. Through the initiative we improve links with local communities living near unstaffed railway stations, enhance our stations and gain valuable feedback on services
- in Galicia, Spain, passenger roadshows, jointly hosted by our team and local authority officials, have given local people a forum to feed back their views on current and future services
- working with the Welsh Assembly Government, Cambrian Rail Partnership and TrawsCambria bus network we launched campaigns to promote travel by bus and rail to some of Wales' most beautiful coastal walks, giving local tourism a welcome boost.



Left The Health Drive Bus, with Manchester United Foundation and Salford Community Health, opens for business



Left An Adopt a Station team at work



Left Meet the Manager with Chiltern Railways



Far left Giving Welsh tourism a welcome boost

Contents | Welcome from the chief executive | Who we are | What we do |
How we work | Our stakeholders | Our business | Arriva UK Bus |
Arriva UK Trains | Arriva Mainland Europe | **Corporate responsibility**

Reaching out

We reach out into communities in many different ways, primarily through the links our services provide but also through the different community partnerships we nurture.

Many community groups need support with transport to get their projects off the ground. This is where we can make a real difference. Every year we provide hundreds of charities, groups and schools with support including free transport and travel advice. Examples include:

- ▶ in Renfrewshire, Scotland, we operate a 'Gym Bus' fitted with quality fitness equipment and a mobile youth club called the 'Youth Bus'. Both encourage youngsters away from anti-social behaviour and were highly commended in the Scottish Transport Awards
- ▶ in Braga, Portugal, we work with local authorities to transport pupils to road safety training sessions
- ▶ in North East England we provided transport to 300 people taking part in a sponsored walk in aid of the 'The Blue Lamp Foundation' set up by David Rathband – a UK police officer blinded in the line of duty
- ▶ in the UK, Arriva Trains Wales won the 2010 Arts and Business Cymru award for working with Theatr Harlech to bring local youngsters and performing arts experts together to create carnivals along the Cambrian coast by offering free transport to participants.

Understand
Aspirations
Community
Strengthen
Support
Nurture
Links



Above Supporting the Blue Lamp Foundation four-mile walk

Left On board the Renfrewshire Youth Bus

Right Transporting pupils to road safety sessions, Braga, Portugal

Right Javelin thrower Hollie Arnold is aiming for success in the London 2012 Paralympic Games



Building positive relationships with schools is an important part of our work. Our employees help with school projects, offer safety advice and explain the environmental benefits of public transport. Across our operations we host hundreds of visits with our vehicles often becoming mobile classrooms for the day.

In the UK, our school pack continues to be a valuable teaching resource supporting the curriculum in maths, science, and social and environmental awareness for seven to 11-year-olds.

We also support grassroots sport by sponsoring many clubs and teams across Europe, providing much needed funding for equipment or travel.

In Wales, Arriva Trains Wales is backing javelin thrower Hollie Arnold as she aims for success in the London 2012 Paralympic Games.

Supporting employees who contribute

Our employees often live where we operate and we encourage them to follow their own community or charity interests.

From fundraising climbs of Kilimanjaro to supporting local scout groups, our people take pride in being part of and supporting the local communities we serve.

For a decade our UK Community Action Awards initiative has successfully recognised the contributions our employees make through voluntary work with winners gaining cash awards from Arriva for their chosen cause.

Notes

Operating in
Czech Republic
Denmark
Hungary
Italy
Malta
Netherlands
Poland
Portugal
Slovakia
Spain
Sweden
United Kingdom

Buses
Trains
Coaches
Waterbuses
Trams
Light rail



For more information on Arriva, please visit our websites.

Group website	Arriva	www.arriva.co.uk
Czech Republic	Bosak Bus	www.bosakbus.cz
	Osnado	www.osnado.cz
	Transcentrum Bus	www.transcentrumbus.cz
Denmark	Arriva Danmark	www.arriva.dk
Hungary	Eurobus	www.eurobus.hu
Italy	Arriva Italia	www.arriva.it
Malta	Arriva Malta	www.arriva.com.mt
Netherlands	Arriva Nederland	www.arriva.nl
Poland	Arriva RP	www.arriva.pl
Portugal	Barraqueiro	www.barraqueiro.com
	Transportes Sul do Tejo	www.tsuldotejo.pt
Slovakia	SAD Michalovce	www.sadmi.sk
	SAD Nové Zámky	www.sadnz.sk
Spain	Arriva Noroeste	www.arriva.es
	Deblas	www.arrivadeblas.es
	Esfera	www.grupoesfera.com
Sweden	Arriva Sverige	www.arriva.se
UK	Alliance Rail Holdings	www.alliancerail.co.uk
	Arriva Bus and Coach	www.arrivabusandcoach.co.uk
	Arriva London	www.arrivalondon.com
	Arriva Regional Bus	www.arrivabus.co.uk
	Arriva Trains Wales	www.arrivatrainswales.co.uk
	Chiltern Railways	www.chilternrailways.co.uk
	CrossCountry	www.crosscountrytrains.co.uk
	London Overground	
	Rail Operations	www.lorol.co.uk
TGM Group	www.tgmgroup.co.uk	
The Original Tour	www.theoriginaltour.com	
Parent company	Deutsche Bahn	www.deutschebahn.com

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