



Bus

Liberalisation stage: emerging

- Entered bus market in 2013
- 755 buses
- 1,270 employees

Our position

Arriva operates bus services in the north and south of the country from 17 depots. The majority of services are regional and school transport, with some urban services.

The market

Regional authorities can award bus contracts by tender or direct award, with competitive tendering not commonly used outside Warsaw. All contracts of more than three years must include a transport plan. 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.



Rail

Liberalisation stage: emerging

- Entered rail market in 2007
- 31 train sets
- 230 employees
- 2.5 million train kilometres operated per annum

Our position

Operating in the north west of Poland, Arriva was the first private company to operate passenger rail services in the country.

The market

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

A further example of the changes in the rail market concerns the creation of regional companies formed by the marshals. 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). Each Voivodship decides whether to direct award services to PR or wholly owned regional companies or put services out to tender in their regions.

Contracts are typically net cost contracts. Usually they are between one and three years.



Bus
Rail

Case study: Innovative ticketing technology

Arriva has introduced innovative, integrated ticketing technology that provides faster and more flexible ticket purchasing for customers, while providing Arriva with real-time sales statistics. The new technology has resulted in speedier purchasing at stations, reducing queues and waiting times.

In future, the 'Mercury' platform will also make it easier for customers to buy tickets from the conductor on board trains, it will include a scanning facility for barcodes and enable seat reservations at the point of sale.

The technology provides Arriva with instant and real-time access to sales data to enable it to run in-depth market analysis and monitoring, and to gauge travel patterns.

Arriva is now working on developing the technology further to combine it with mobile telephones and Radio-Frequency Identification to support the introduction of a loyalty programme that will provide customer benefits at shops and leisure facilities. The use of paper tickets is expected to reduce significantly in the future.

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.
- Arriva introduced four new trains for service in the Kujawsko-Pomorskie region in 2012 as part of a €10 million investment programme. The new vehicles offer improved comfort and disabled access, have 130 seats and can operate at speeds of up to 120km/hour.
- The contract for rail services on four new lines in Kujawsko-Pomorskie Voivodship was signed in July 2013 and services started in December 2013.

Key dates

	2013	Acquired Veolia Transport Central Europe's Polish bus operations
	2013	Won a two-year contract to provide additional train services in the Kujawsko-Pomorskie Voivodship from 2013 to 2015
	2010	Became sole owner of JV rail company and re-won the previously operated network for a period of 10 years
	2007	Start of operations in Poland as a JV with PCC Rail