

in brief

Arriva operates approximately five per cent of the Italian bus market.

The Italian passenger transport market is the third largest in Europe.



History

Arriva entered the Italian market in July 2002 when it acquired SAB Autoservizi Srl, a bus group with subsidiaries operating in the Lombardy, Liguria and Friuli-Venezia Giulia regions of northern Italy.

It made further acquisitions in 2004 when it acquired 49 per cent of Società Autoservizi FVG SpA (SAF) in the Udine area of the Friuli-Venezia Giulia region, and in 2005, when it acquired 80 per cent of the SADEM operations near Turin. In 2008 Arriva purchased the remaining 20 per cent of SADEM, and its subsidiary SAPAV, taking its ownership to 100 per cent.

Arriva Italia was established in 2007 as the holding company of the societies (SAB, SIA, SAL, SAIA, SADEM), and in other cases it has the majority shareholding (SAF, RTL).

The market

While the Italian **bus market** has begun liberalisation, market opening is slow and competitive tendering is not yet commonplace.

The market is highly subsidised, with low fares. The state provides funding nationally and subsidies are available for fleet investment. Provincial or municipal local authorities are responsible for bus provision and setting fares inside a general framework. Contracts are typically net cost.

The **rail market** is yet to liberalise however some regions are considering market opening.

Bus

Arriva Italia

Arriva operates urban and inter-urban bus services in the north of the country, and also provides airport connection services to Turin and Milan.



In some cities, such as Trieste, Cremona and Como, Arriva has a minority shareholding in but management control of operating companies, KM, Trieste Trasporti, and ASF.

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SAB, SAL, SIA, SAIA

SAB, SAL, SIA, SAIA operate principally in the Lombardy region of northern Italy, providing urban, inter-urban and airport services in the Bergamo, Brescia and Lecco areas.

SADEM

SADEM and its subsidiary SAPAV operate in the Piemonte and Valle d'Aosta regions of northern Italy to the west of Arriva's other operations. Their main activity is public transport bus services as well as commercial, contract and private hire services.

SAIA Trasporti

In January 2008 we increased our shareholding in Brescia-based SAIA Trasporti to 100 per cent. The initial shareholding was acquired as part of the 2002 purchase of the SAB Group.



SAF

In 2004 Arriva purchased 49 per cent of SAF, increasing this to 60 per cent in 2005. SAF operates inter-urban, urban and contract operations in Udine.

ASF autolinee (ASF)

In 2007 Arriva entered a joint venture with Ferrovie Nord Milano Group (FNM SpA) and acquired 49 per cent of Italian bus operator SPT Linea.

SPT Linea operates buses across the Lombardy region of northern Italy.

Trieste Trasporti SPA

In 2005 Arriva acquired a 35 per cent stake in Trieste Trasporti which increased by a further 5 per cent in September 2006.

Arriva in Italy

Arriva's combined businesses in Italy, including share of associates, have 2,500 people and operate 1,900 vehicles.

Related websites (in Italian and English):

www.arriva.it

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