



ANNUAL REVIEW

2020

ARA.NET.AU



ABOUT THE AUSTRALASIAN RAILWAY ASSOCIATION

The ARA is the peak body for the rail sector in Australia and New Zealand. We advocate for more than 170 member organisations to support vibrant, sustainable and connected communities and promote greater use of rail across our passenger and freight networks.

Our members include every aspect of the rail supply chain, from the passenger and freight operators that keep essential services moving to the track owners, managers, contractors and suppliers that ensure a safe and efficient rail network.

We believe the rail industry has a crucial role to play nationally and in the region's sustainable development and growth, and know that the industry offers meaningful and rewarding careers for tens of thousands of people.

Our significant program of work is focused on supporting a strong advocacy agenda, and creating opportunities for the rail industry to network, collaborate and share information, to maximise the benefits rail has to offer the wider community.

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CHAIRMAN'S MESSAGE

While the COVID-19 pandemic presented well documented challenges for many of us in 2020, it also brought the importance of fostering a strong community within our industry into sharp focus.

Our membership grew during the year as more organisations sought opportunities to come together to network, albeit virtually, share information and find solutions to new challenges. I am immensely proud of the ARA's work to meet this need and bring together the many people and businesses that had to find new ways of working as the world dealt with a global pandemic.

WELCOMING NEW LEADERSHIP

It was quite a year to welcome Caroline Wilkie as our new Chief Executive Officer in February. Undeterred by the limitations on travel and events, Caroline quickly set to work meeting our members via zoom to understand the issues that were of importance to you in 2020. Her commitment to immediately connect and engage with members, and find new ways of delivering for them, has proven invaluable as we moved quickly to support the industry in its response to the pandemic.

RESPONDING TO COVID-19

Of course, the key focus of 2020 was supporting the industry's response to COVID-19, as we all dealt with new realities in our day to day operations.

The Board worked closely with the ARA's leadership team to reposition our focus for the year to ensure we could be a valuable support for our members through this. I have been pleased to see the strong sense of collaboration within the industry as we have worked to advocate for rail to play a key role in the nation's infrastructure-led recovery. This will remain a focus in 2021 as the Board continues to drive its strategy to champion the growth of the industry as we emerge from the recession.

The ARA also moved a significant range of meetings and events online to ensure we could continue to foster connections across the industry. A fully online format for AusRAIL was a new challenge and a huge undertaking for the team. Many of our members told us that our commitment to continue with the event in this new format was greatly appreciated by industry. It provided a much needed opportunity to share information on the learnings from the year and filling the void left by so many cancelled events in the wider industry.

Our regular Board meetings and AGM also moved online during the year.

CHAMPIONING RAIL

In 2019, we confirmed our strategy to become the strongest possible voice for the rail industry, with a commitment to increase our communications and advocacy focus. This proved to be prescient given the increasing importance of this work as we responded to the events of 2020. The Board has supported a significant focus on championing the benefits of our industry through evidence-based research, targeted advocacy measures and clear communications during the year. We will continue this focus in 2021 as we champion the outstanding work of the industry to drive the economy and support the sustainable development of our cities and towns.

BOARD CHANGES

We were delighted to welcome new Board members in 2020 to support our strategy. They arrived at a busy time, with the Board meeting eight times during the year – twice as much as a normal year – and our Audit and Risk Committee meetings taking place on a monthly basis.

Australian Rail Track Corporation (ARTC) Chief Executive Officer Mark Campbell joined the Board early in the year following John Fullerton's retirement.

We subsequently welcomed Hitachi Australia Chief Operations Officer Michael Miller and OneRail Chief Commercial Officer John McArthur as general directors, and Metro Trains Melbourne Chief Executive Officer Raymond O'Flaherty as our new passenger sector director. We briefly welcomed then-Aurecon Managing Director, Transportation, Australia & New Zealand Becky Wood to the Board as a general director, however a subsequent move overseas prompted her resignation a short time later.

These changes have ensured we are strongly positioned to drive the ARA's strategy as we work with industry to maximise the opportunities Australia and New Zealand's infrastructure-led recovery will present. Pleasingly, Anna Squire and Nick Easy's reappointments, endorsed at our AGM in November, also ensured we retained a number of longstanding directors to maintain Board continuity over time.

I would like to offer the Board's thanks and gratitude to those directors who have left us in 2020, including John Fullerton, Leah Waymark, Louise Collins and Becky Wood.

THANK YOU

In a year like no other, the support of our members, staff and industry colleagues has been unwavering. Thank you to the members who contributed their time and knowledge to inform our advocacy during the year, to make sure we could best represent the industry. On behalf of the Board, I would also like to sincerely thank the ARA team. Together, they have worked through the changes and challenges of 2020 with a relentless focus on our members and a commitment to raising awareness of the significant benefits our industry is delivering.



DANNY BROAD
ARA Chair

CEO MESSAGE

In a year characterised by change, the rail industry's ability to forge ahead with providing essential services and building for the future must be considered a triumph.

When we gathered for AusRAIL late in 2020, I reflected on the contribution of the industry during a most unusual year. Safe, essential public transport services continued even at the height of COVID-19 lockdowns. The freight industry stepped up to meet increasing demand as our skies grew ever-more-quiet. Major projects continued to progress and manufacturers and suppliers forged ahead with their essential work, keeping the industry going. In the face of challenges we have not seen before, this is a record of achievement worthy of acknowledgement.

Just as the industry forged ahead, so too did the ARA. We made a conscious decision to add to our member offering to keep the industry connected in the absence of the usual events and networking opportunities.

We expanded our communications and advocacy program to ensure we were the strongest possible voice for our members during the year. And we progressed a significant research program to lay the foundations for our work on members' behalf over the coming years.

In doing so, we have started the evolution of the ARA's offering to provide more flexibility and choice in how you connect with us and the wider rail industry.

NEW INITIATIVES DRIVE INCREASED ENGAGEMENT

While the temptation for many organisations was to pause their activities when COVID-19 emerged, we quickly recognised that connection and information sharing would be vitally important for our members as we navigated a new reality.

We rapidly established our first webinar program early in the year to provide new opportunities for online networking, generating more than 5000 registrations over the course of the year. These conversations have been thought provoking, insightful and inspiring as we have heard of new innovations being applied in the industry, and clever approaches to some of the common challenges we all face. We are continuing the webinar program in 2021 even as we return to more face-to-face events to keep the conversation going.

Our new Faces of Rail campaign also provided an opportunity to recognise the amazing work of people working in Australian and New Zealand rail. Our profiles have continued to be popular features in our communications to members, and really showcase the diversity of careers we have on offer in the industry. As we build our focus on promoting careers in rail over the next year, the campaign provides a good foundation to tell more stories about the people that drive our industry.

RESEARCH PROGRAM KICKS OFF

It would have come as no surprise to our members that the release of our Value of Rail 2020 report confirmed our industry is playing a growing and important role in the economy and community. The report provides a rich dataset to inform our advocacy on members' behalf and will be put to very good use in the year ahead. There were consistent themes throughout the report about the significant safety, sustainability and community benefits rail offers our cities and towns, and this is a theme we will continue to explore over time.

Our report, Finding the Fast Track for Rail Innovation, was also well received when it was released in October. It confirms there is huge potential to create a rail innovation culture in Australia and New Zealand. This would not just benefit our own industry, but create valuable export opportunities to help us tap into the \$362 billion global rail technology market.

I am pleased to say we have continued to progress our research program in the new year, with reports

on faster rail and the rail supply chain released in the first quarter of 2021, and further research on freight modal shift and lighter rail to be released soon.

EVENTS MOVE ONLINE

Of course, in a year where face-to-face events were particularly difficult, we were excited to create a new format for AusRAIL in 2020. The fully online format allowed us to expand the program and feature a range of international keynotes – something we just wouldn't have been able to do any other way. It was great to see so many members get involved in the event and share so much positive feedback about the program. While our foray into the world of online conferences was a good one, we are very much looking forward to getting back to our traditional format when we host AusRAIL PLUS 2021 in Brisbane in December.

After a busy, unpredictable and exciting first year in the job, I would like to say thank you to all our members for taking time to meet with me, share your views and provide insights into the issues that are important to you. I would also like to thank the ARA team for continuing to deliver an extensive member offering to you in changing times. We look forward to another busy year in 2021.



CAROLINE WILKIE

CEO

2020 HIGHLIGHTS

MEMBER ENGAGEMENT



One-on-one virtual meetings with 100+ members



Established a new Sustainability Committee



Reached more than 10,000 followers on LinkedIn



Revealed a new-look Weekly Update

RESPONDING TO COVID-19



New committees and working groups established to help the industry respond, and virtual briefings with state ministers to highlight rail's commitment to keep Australia and New Zealand moving



Member report on public transport patronage to support the safe return to the network



Communications to promote the industry's contribution to keep Australia and New Zealand moving during the pandemic

EVENTS AND PROGRAMS



New webinar program launched, reaching 5000+ people



Mentoring programs delivered online



New boardroom events launched



Australasian Rail Industry Awards delivered online – October

AusRAIL

AusRAIL Live & On Demand – December

RESEARCH AND REPORTS

- **Gender Diversity Report** – April
- **Tendering Framework for rollingstock, signalling and contractors** – May
- **Member survey on COVID-19 impact** - May
- **Finding the Fast Track to Rail Innovation** – October
- **Value of Rail 2020** – November
- **Rail Construction Procurement Guide** – December





RESPONSE TO COVID-19

The ARA moved quickly to respond to COVID-19, working closely with industry to support their continued operations during the pandemic.

New meeting schedules and online events provided the opportunity for members to share information as they responded to new challenges, while the ARA established an extensive advocacy program to highlight the essential role rail will play in driving Australia and New Zealand's post pandemic economic recovery.

We championed the work of essential rail operators to keep rail services safely operating in the most challenging of circumstances.

Bringing industry together

As the unprecedented events of 2020 unfolded, we created new ways for the industry to network and share information as they worked together to keep Australia and New Zealand moving.

New, high frequency meetings were established with senior leaders from across the industry to share new approaches, challenges and priorities when managing COVID-19. For example, weekly meetings were established at the height of the pandemic to allow the CEOs of public transport operators to discuss their efforts to keep rail services safely operating, event at the height of COVID-19 restrictions. These meetings have continued on a monthly basis in 2021.

Further meetings of safety, security and business resilience staff were established to provide a forum for members to share their COVID-19 response strategies.

The ARA's ability to bring senior industry leaders together to support a strong industry knowledge base helped ensure the rail industry could continue its critical work to keep essential public transport and freight services safely operating through the pandemic.

Promoting the work of the rail industry

As businesses across the rail industry moved to keep essential services safely operating, the ARA highlighted the outstanding working of the industry and its people throughout the year.

We released a series of reports highlighting the rail industry's contribution to the response to the pandemic, including:

- Fact sheet and social media content outlining how the industry was keeping public transport services safely operating
- Regular commentary on the role of public transport and freight operators in supporting the nation's response to COVID-19
- Focus on rail workers across all aspects of the supply chain, recognising their essential work during the pandemic

We will continue to highlight the industry's efforts in response to the pandemic in 2021.

Assessing the impact of COVID-19

We released the findings of our survey of rail suppliers, contractors and freight operators in May, exploring the impact of COVID-19 on the industry. Our members told us that maintaining the project pipeline would be essential to see them through the pandemic, while more and more businesses looked to shore up their supply chains by boosting their use of local suppliers. The survey highlighted the potential for the nation's pandemic response to create a stronger Australian rail supply chain for the long term, if the policy settings were right.

A detailed report on the impact of COVID-19 on public transport patronage was also released late in the year, confirming the significant impact of restrictions on services across Australia and New Zealand. The report will form the foundation of quarterly return to rail reports to be released in 2021.

Highlighting rail's role in recovery efforts

We worked closely with government to confirm the essential role rail would play in supporting Australia's economic recovery after the pandemic. Industry briefing sessions with key government decision makers throughout the year provided opportunities to discuss the challenges experienced by the industry, and the importance of maintaining project pipelines to support an infrastructure-led recovery.

The ARA liaised with government on potential stimulus projects within the industry to support economic growth and jobs creation, and welcomed the announcement of rail project funding across the year.

AUSTRALASIAN RAILWAY ASSOCIATION

MEMBER BRIEFING: THE IMPACT OF COVID-19 ON PASSENGER RAIL IN AUSTRALIA & NEW ZEALAND

COVID-19 restrictions decimated public transport use in 2020, reducing passenger numbers by more than 90 per cent on some networks at the height of the pandemic.

In the first eight months of 2020, rail travel in Australia and New Zealand dropped by 266 million trips. That's an average of 28 million trips that disappeared from the rail network each month.

While many have returned to public transport since the historic lows of earlier this year, the data reveals it may take some time to get all of us back on track.

As an essential service, public transport has safely operated throughout COVID-19. It has been a lifeline for our essential workers and the people that rely on the rail network in their everyday lives. But the experience of Auckland, Western Australia and South Australia - where restrictions eased earlier than other jurisdictions - confirms that patronage is unlikely to return to pre-COVID-19 levels for some time.

Every time we lose a passenger from public transport, we face the prospect of more congestion on our roads and more pressure on our infrastructure network. As well as seeking a new COVID-normal life, it is time to get people back on public transport.

Public transport use was 55 per cent down on 2019, while use of toll roads was only 20 per cent lower than the previous year.

1 | BRINGING PEOPLE BACK TO PUBLIC TRANSPORT AFTER COVID-19



PASSENGER TRANSPORT GROUP

With some public transport operators recording falls in patronage of more than 90 per cent at the height of the pandemic, 2020 required new ways of working to support our members.

Despite the challenges of the year, the Passenger Transport Group also forged ahead to progress its accessibility agenda and support the development of new research to inform investment in faster rail and light rail in years to come.

Additional meetings to support public transport operators' response to COVID-19 provided invaluable opportunities for our passenger transport members to network and share in changing times. These meetings allowed senior leaders to share insights on cleaning and hygiene measures, communications with customers and the implementation of new technologies to support their COVIDsafe operations.

Mapping the future of passenger rail

The Passenger Transport Group commissioned two new research papers in 2020 to inform future investment in passenger rail services across Australia.

The Faster Rail Report was commissioned in 2020 and released in early 2021. Authored by Arup, the report identified a three-step plan for faster rail in Australia, and noted the significant economic and community benefits that could be realised by investment in faster rail.

The findings confirmed the need for immediate investment in Australia's existing regional rail network to improve the speed, reliability and frequency of rail services. It also called for the progression of fast rail lines over the next decade, and the preservation of corridors to support the development of high speed rail in the long term.

The Passenger Transport Group also commissioned a Light Rail Report to be developed by the RPS Group in 2020. The report is scheduled for release in mid-2021.

Furthering the industry's commitment to accessibility

We continued to lead the industry's commitment to providing accessible rail for all across the community. The ARA actively participated in the modernisation of the Disability Standards for Accessible Transport (DSAPT) in 2020. The standards have not been modernised since their release in 2002, and the ARA continues to work with members to inform the modernisation process being co-led by the Commonwealth Government and Transport and Main Roads Queensland.

We once again submitted annual reports to the Australian Human Rights Commission (AHRC) on the ARA's temporary DSAPT exemptions, which sought to provide clarity for ARA members while

the modernisation process continues.

We also participated in the AHRC's development of an Equivalent Access Guideline as part of a small, invite-only review process, and made a submission to the review of the Disability (Access to Premises - Buildings) Standards 2010 (Premises Standards).

Supporting safe public transport services

The health and wellbeing of rail workers and their customers remains the highest priority for the ARA and our members.

We actively participated in the Queensland Sentencing Advisory Council review of sentencing options and penalties for the assault of public officers during the year. We called for penalties for anyone who assaults public transport staff to be equal to those applied for assaults against emergency services personnel.

Our Anti-Social Behaviour Working Group also developed a Threat Control Library detailing controls used across the industry to prevent and address anti-social behaviour on the rail network. The resource includes an analysis of the effectiveness, costs, resources and benefits of different controls to inform public transport operators' decision making when implementing new measures.

Tracking performance

A review was completed during the year to provide an overview of passenger transport operators' reliability and performance metrics. This provided a useful benchmarking exercise for participating organisations to inform their future planning.

We also continued regular meetings with passenger transport members to discuss strategies on issues including revenue protection, rostering, scheduling and workforce development. This work will continue in 2021.



RAIL FREIGHT AND PORTS GROUP

As national and international supply chains were significantly impacted by the events of 2020, our rail freight and ports members continued their essential work to keep the country moving.

We engaged with industry and government to support efforts to ensure rail freight workers could continue to deliver essential services across state borders.

We also released our 2020-2022 rail freight and ports strategy during the year, confirming three key priority areas for action. The release of the strategy followed extensive consultation with our members to ensure the ARA's advocacy agenda meets industry needs as rail prepares to fulfil growing demand over the next decade.

Confirming the growing importance of rail freight

The ARA's Value of Rail 2020 report released in October confirmed the growing role rail is playing to meet our national rail freight task. The report confirmed Australia's freight task grew to 759.6 billion net tonne kilometres in 2019, with the rail industry the biggest contributor to meeting this need.

Rail's contribution was also expected to grow, with the report predicting rail would meet 72 per cent of new demand expected by 2030.



Accounts for **35%** of the rail industry's total contribution



Employs **21,146** people (direct FTEs)



Rail freight jobs have grown **50%** since 2016



Choosing rail over road **improves environmental and safety outcomes**

Impediments to mode shift

We commissioned a new research project to identify impediments to mode shift during the year to inform our advocacy on this crucial issue.

The ARA has long advocated for greater use of rail in the freight sector to maximise the clear safety and sustainability benefits that can be derived from increased mode share for rail. However, the industry continues to face challenges when compared with other modes and urgent action is needed to address this issue.

We engaged GHD to complete new research to examine the obstacles faced by the rail freight sector, and identify actions that could address these challenges to support greater use of rail in the future.

Preliminary findings were presented at AusRAIL in December to provide industry with an opportunity to share feedback before the report was finalised.

The report is due to be released in 2021 and will inform further work to advocate for mode shift as the rail industry supports the nation's growing national freight task.

Highlighting the benefits of Inland Rail

The ARA continued to advocate for the benefits the Inland Rail project will deliver, speaking at the Rural and Regional Affairs Transport and References Senate Committee Inquiry about the once in a lifetime opportunity the project presents.

ARA Chief Executive Officer Caroline Wilkie spoke at the hearing in August, noting the extensive consultation, planning and route analysis that had been undertaken ahead of the project's delivery.

She said the project would unlock billions of dollars and vital new jobs, and it was important the project could progress as planned.

The committee hearing preceded the official opening of the Parkes to Narromine section of the route in September. The ARA attended the official opening of the section, once again highlighting the transformational impact the project would have.



SUPPLY CHAIN

As the importance of supply chain resilience became clearer than ever, the ARA delivered new research and best practice guides to support growth and innovation across the rail supply chain.

An ARA survey released in May found that maintaining the project pipeline was the number one thing governments could do to support the health of the rail supply chain during the pandemic. The survey also identified new opportunities for Australian suppliers, with three quarters of respondents saying they were considering greater use of suppliers within Australia or their own state as a result of COVID-19.

Our advocacy agenda during the year focused on harnessing this opportunity to drive improvements across the rail supply chain.

Best practice tendering guide

We launched our Best Practice Guide to Rollingstock and Signalling Tendering in the Australian rail industry in May, identifying 21 recommendations to simplify government tendering processes and help speed the post-pandemic recovery.

The guide confirmed that Australian tendering costs were higher than global benchmarks and made it harder to get projects out of the planning phase and into delivery.

The ARA held meetings with state governments across Australia to discuss the guide's key recommendations and identify areas where governments were already progressing improvements to simplify tendering processes.

This work is continuing in 2021, as we roll out a traffic light report defining key areas for further action in each jurisdiction.

The Australian rail supply chain

The ARA engaged BIS Oxford Economics to undertake a wide-ranging survey to map the Australian rail supply chain in 2020.

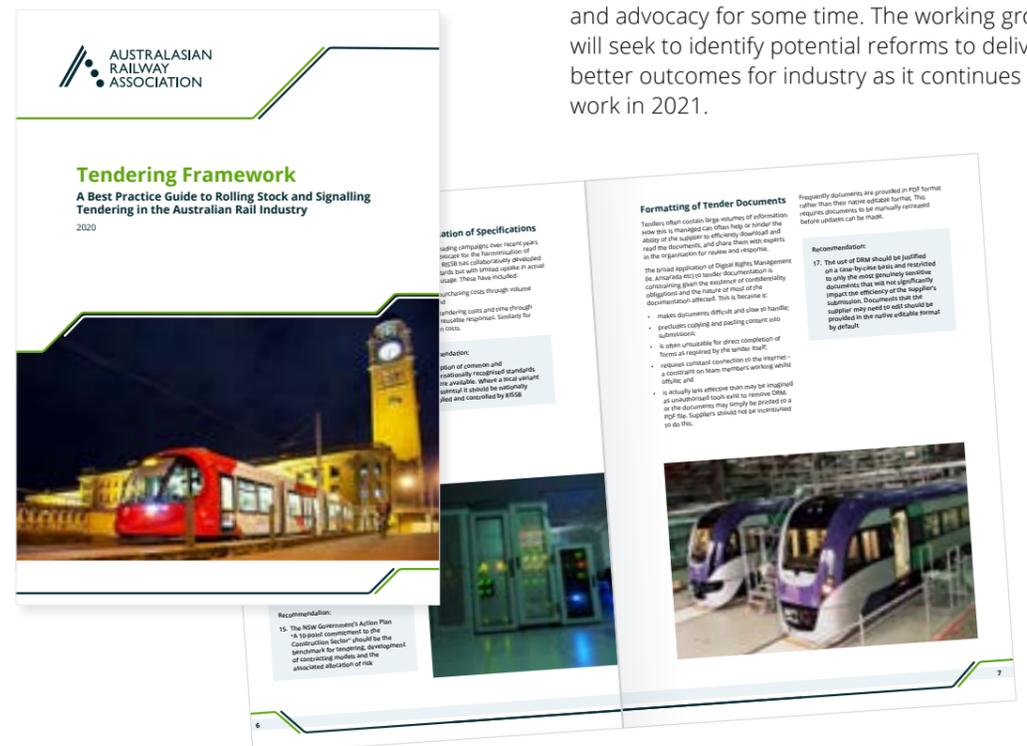
The survey aimed to identify the size, scope and key challenges and opportunities facing businesses across the supply chain, and was supported by a series of consultation sessions with ARA members and industry representatives.

The research was completed in 2020, with the report released in early 2021.

Type approvals working group

We commenced investigations on best practice type approval processes in 2020, establishing a dedicated working group to lead these efforts.

The need to ensure type approvals processes can adapt to changing industry needs and deliver consistent outcomes across jurisdictions has been repeatedly highlighted in the ARA's research and advocacy for some time. The working group will seek to identify potential reforms to deliver better outcomes for industry as it continues its work in 2021.



Fast tracking rail innovation

The ARA's research report on Finding the Fast Track for Rail Innovation was released in October, identifying a three-step plan to support the development of a strong rail innovation culture in Australia.

The report, authored by L.E.K. Consulting, found Australia is lagging behind its overseas counterparts when it comes to technology and innovation adoption. With the global technology market worth \$362 billion and growing, there is significant opportunity for the Australian rail supply chain to play a greater role in rail innovation in the future.

The report called for:

- the creation of a national R&D body, with long term and certain research funding
- the development of a single rail technology market, to give the industry the scale it needs to innovate and grow
- the creation of a rail innovation culture supported by best practice procurement and smart rail strategies

The ARA is progressing the recommendations of the report together with government and industry in 2021.



To make the most of the next wave of rail investment, we must act now to create a culture of innovation in rail. A three point plan will help achieve this.



Supporting rail construction investment

As rail construction activity continued to progress during the year, the ARA worked closely with its members to identify opportunities to make the most of the next wave of investment to follow in the next decade.

With the Value of Rail 2020 confirming \$155 billion in rail investment is planned over the next 15 years, the ARA has engaged with members, industry and government to ensure we make the most of this unique opportunity to establish a strong and resilient rail supply chain for the long term.

We supported our members as they continued to deliver key projects at the height of the pandemic, highlighting the essential role the rail industry would play as part of an infrastructure-led economic recovery.

Best practice principles for rail construction procurement

We released our Best Practice Principles for Rail Construction Procurement during the year, outlining key recommendations to improve procurement outcomes of major rail projects.

The document supported many of the findings of the tendering framework developed for rollingstock and signalling earlier in the year, confirming the common challenges experienced across the rail supply chain.

The ARA believes significant benefits could be realised if improvements were made to current rail construction procurement practices, particularly through more streamlined and consistent tendering processes across jurisdictions.

We have been engaging with state governments on our recommendations, noting the benefits that could be realised by both government and industry if reforms were achieved.

The outcomes of this engagement have informed the development of our traffic light report to track

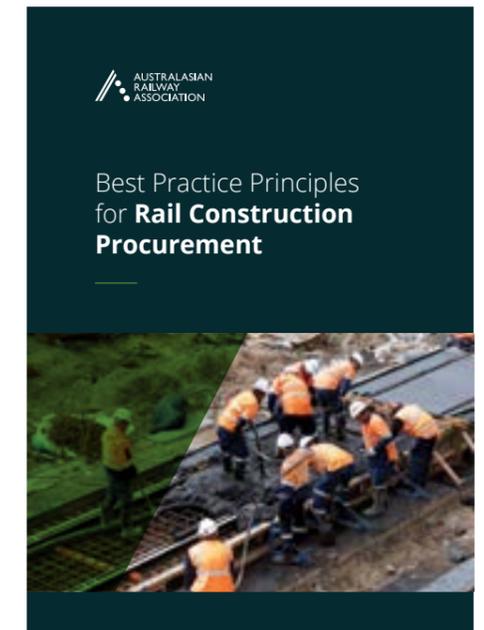
progress across jurisdictions in the year ahead.

Collaboration with industry

The ARA strengthened its engagement with the wider infrastructure sector during the year as part of its commitment to supporting the development of rail projects across the country.

We held regular meetings with Roads Australia and the Australian Constructors Association to discuss issues of shared concern across our respective memberships.

The meetings have provided a good opportunity for driving collaboration on key issues facing the broader infrastructure sector.





WORKFORCE DEVELOPMENT

We progressed a number of initiatives during the year to support the attraction, retention and development of the people that will shape the future of rail.

The essential work of the rail industry in 2020 confirmed the importance of a strong workforce that can meet changing community needs. As new projects commenced and a significant forward pipeline of work was confirmed, the ARA strengthened its focus on workforce development to support the long term needs of the industry.

A number of key initiatives commenced in 2020 will continue into 2021 as the industry prepares for the next wave of growth.

Gender diversity report released

Our latest Gender Diversity Report was released in April, confirming that while the industry had made some gains in recent years there was more work to do.

Just 27 per cent of the rail workforce were women, with only 22 per cent of managers being female.

While the report confirmed that more women are staying in the industry and being promoted, the rail industry remains below national averages. Most rail businesses surveyed have dedicated diversity policies in place to support greater female participation and advancement in the industry.

The ARA will continue to track the industry's progress on this critical issue in the future.

Mentoring programs continue during the pandemic

The ARA expanded its mentoring program during the pandemic, recognising the importance of maintaining career development and networking opportunities for its emerging leaders while work from home arrangements were in place for many.

The Women in Rail Mentoring Program moved to a fully online format, with mentors and mentees working together over the course of the year.

We also introduced a new Rail e-Mentoring Program for emerging leaders across the rail industry, conducting the program through online meetings throughout the year.

Participants of both programs confirmed the value of this career development opportunity through the pandemic to ensure a continued focus on their career growth in changing times.

The ARA will run both programs again in 2021 as a result of the positive feedback received in 2020.

Rail Industry Worker program

The National Rail Industry Worker Governance Committee progressed a new service agreement for the program with its operator, MTA, to ensure its long term sustainability for the benefit of industry.

A number of system improvements were rolled out throughout the year to make sure the program continues to meet the changing needs of industry, with further improvements planned for implementation in 2021.

National competencies

We progressed the development of new national competency matrices to make it easier for people to work across projects and jurisdictions.

We confirmed a new Signalling Competency Matrix in 2020 following extensive consultation with industry.

Work also commenced on the development of a Power and Electrical Competency Matrix and a Project Management Competency Matrix. This work will continue in 2021.

Supporting skills development

We highlighted the need to support a strong pipeline of new talent into the rail industry through ongoing engagement with state governments and the wider industry.

We commenced discussions about the potential for the creation of skills academies and education courses that provide a focus on rail careers, making good progress in our engagement on these issues.

Further work to develop these concepts was planned in 2021.



ADVOCACY HIGHLIGHTS

The ARA embarked on a significant research program in 2020 to support its advocacy agenda. With key research released during the year - and more to come in 2021 - this is building a strong evidence base to support our work on members' behalf.

We also strengthened our engagement with state and federal governments in 2020 to support the industry's response to COVID-19 and highlight the essential services delivered by the rail industry in unprecedented times.

We increased meeting schedules and established new committees and working groups to provide members with an opportunity to share information and discuss common challenges as pandemic restrictions unfolded. This provided a vital network for industry as it met changing community needs and kept key projects operational at the height of restrictions.

Advancing our research agenda

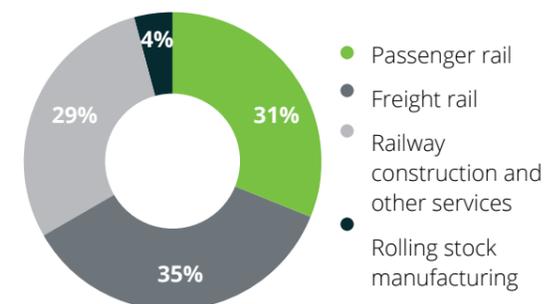
We established a strong research agenda to inform our advocacy efforts in 2020 and beyond, recognising the importance of a robust evidence base to support our engagement with government and industry on the key issues facing our members.

The foundational Value of Rail 2020 report provided an overview of the rail industry's significant economic and community contribution. Building on the report of the same name issued in 2017, Value of Rail confirms the essential role the industry has to play in the nation's sustainable development and growth.

Our report on Finding the Fast Track for Rail Innovation was also released during the year, making the case for a national focus on rail innovation across Australia. We are now advancing a significant policy agenda to support the findings of this report.

New research was also commissioned on Australia's supply chain, faster rail, freight modal shift and light rail during the year. Combined, these reports will provide a substantial body of evidence to support our work to progress national standards, improve procurement and local content policies and ensure a sustainable pipeline of investment to support the future of rail.

The Value of Rail 2020 confirmed the contribution of all sectors of the rail industry.



In 2019, the contribution of the rail industry continued to grow.

 **Contributed \$29.8 billion to the Australian economy**

2019 \$29.8 billion

2016 \$26.1 billion

Up by \$3.7b since 2016

 **Employed 165,000 workers**

2019 165,000

2016 145,000

 Supported 900 businesses

 spanning 20 employment hubs across Australia

National Rail Action Plan

The National Rail Action Plan was established to ensure the sector has the skills and labour required to build and operate a safe and efficient rail network. We have played an active role in the three working groups supporting its delivery.

ARA Chief Executive Officer Caroline Wilkie was named co-chair of the Skills and Labour Working Group alongside SA Department of Transport and Infrastructure Chief Executive Officer Tony Braxton-Smith in May. The ARA has also been active participants in the Interoperability and Harmonisation and Common Standards working groups throughout the year. All three working groups put forward recommendations for consideration by the Infrastructure Transport Ministers' Meeting in 2021.

National Rail Safety Data Strategy

The ARA progressed the implementation of a National Rail Safety Data Strategy in partnership with the Office of the National Rail Safety Regulator (ONRSR).

The strategy aims to make it easier to report on safety issues and access data to inform decision making about safe work practices across the country.

An initial consultation paper on the strategy was released in 2020, with industry feedback informing a range of changes to the proposed approach.

The consultation process continues in 2021.

Establishing our Sustainability Committee

The increasing significance of sustainability across the infrastructure sector led to the creation of a new Sustainability Committee in 2020.

Rail's natural alignment with the growing focus on sustainable development had previously been identified by the Young Leaders Advisory Board (Y-LAB) as a significant asset when attracting and retaining young talent to the industry.

As many rail organisations are taking proactive steps to further embed sustainability principles into their operations, the ARA has sought to strengthen its own focus on this critical issue.

The Committee was formed in September and will deliver its foundation strategy in 2021.

Submissions

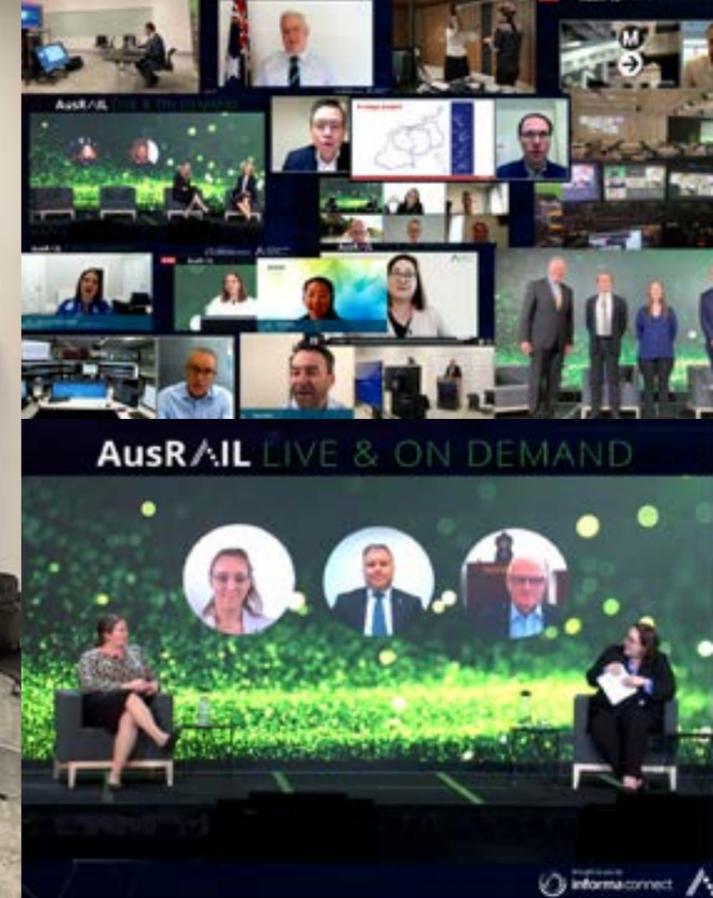
The ARA made submissions on several issues affecting the rail industry. The following list of submissions highlights the range of issues we engaged with throughout the year. Our submissions were supported by member feedback through our committees and working groups.

We continue to engage with industry and government on many of the issues addressed through these submissions as part of our ongoing policy program.



Key submissions

- Queensland Sentencing Advisory Council – Penalties for assaults on frontline workers (January 2020)
- Australian Human Rights Commission - Guidelines on Equivalent Access under DSAPT 2002 (February 2020)
- Australian Communications and Media Authority (AMCA) – Arrangements for jamming devices and radio communication device exemptions (March 2020)
- DITRDC and ACMA – Consultation on the proposed changes to the Radiocommunications (Spectrum License Tax) Determination 2014 (March 2020)
- Infrastructure Australia – Proposals for Rail Stimulus Package (April 2020)
- Department of Infrastructure, Transport, Regional Development and Communications (DITRDC) – Opportunities to Support the Rail Sector (May 2020)
- Office of the National Rail Safety Regulator (ONRSR) – Guideline for Rail Safety Work (May 2020)
- Department of Transport and Main Roads (QLD) – Building a COVID-19 Recovery Plan (June 2020)
- Queensland Sentencing Advisory Council – Penalties for assaults on public officers (June 2020)
- Department of Industry, Science, Energy and Resources – Australia's Technology Investment Roadmap (June 2020)
- NSW Productivity Commission – Review of Infrastructure Contributions (July 2020)
- Australian Human Rights Commission – Temporary Exemptions to the DSAPT 2002 (July 2020)
- NSW Treasury – NSW Review of Federal Financial Relations (July 2020)
- Commonwealth Treasury – Pre-Budget Submission 2020/21 (August 2020)
- Victorian Department of Transport – Independent Review of the Victorian Ports System (August 2020)
- Office of the National Rail Safety Regulator (ONRSR) – Draft Guideline for Fatigue Risk Management (September 2020)
- Department of Home Affairs – Protecting Critical Infrastructure and Systems of National Significance (September 2020)
- Department of Infrastructure, Transport, Regional Development and Communications (DITRDC) – National Freight Data Hub Discussion Paper (September 2020)
- Department of Infrastructure, Transport, Regional Development and Communications (DITRDC) – Coastal Trading Reform for Cargo Vessels (October 2020)
- Office of the National Rail Safety Regulator (ONRSR) – Consultation Regulatory Impact Statement for in-cab audio and video safety recordings (October 2020)
- Department of Infrastructure, Transport, Regional Development and Communications (DITRDC) – Improving the telecommunications powers and immunities framework (October 2020)
- Australian Human Rights Commission – Supplementary Submission on Temporary Exemptions to the DSAPT 2002 (November 2020)
- Department of Industry, Science, Energy and Resources – Disability (Access to Premises – Building) Standards 2010 Second Review (November 2020)
- Infrastructure and Transport Ministers Meeting – Agenda submission (November 2020)



EVENTS AND PROGRAMS

In a year where events moved online, we increased efforts to bring our members together in new ways. As a result, our 2020 events and programs included many new initiatives developed during the year.

We realised early in the year that online engagement would be essential to maintaining industry connection and supporting information sharing during changing times. We moved quickly to identify new initiatives to bring rail professionals together, even as many of us worked from home.

While many of our events in 2020 were made for the moment, key initiatives created in the course of the year will now become an ongoing part of our events and programs calendar due to popular demand.

Webinars attract 5000 registrations

The start of the pandemic prompted the creation of a new webinar series - the ARA's first foray into the online format.

The series proved extremely popular, with 5000 registrations during the year. Content featured case studies and thought leadership, industry panel discussions and research presentations, providing members with the chance to stay up to date with the latest industry developments no matter where they were located.

The webinar program will continue to feature as part of our events calendar in 2021 as a result of the strong support for the format.

AusRAIL Live & On Demand

We moved AusRAIL to an online format in 2020 after it became clear that COVID-19 restrictions would make it difficult for some members to attend in person.

The new format allowed us to significantly expand the program to feature more speakers and more streams than ever before.

The three-day event was hosted within a dedicated online platform which allowed delegates to attend the virtual exhibition, take part in interactive discussions and polls and view keynote presentations from industry leaders across Australia, New Zealand and around the world.

We also hosted satellite events in Brisbane, Sydney and Perth as part of the week, to allow delegates and industry representatives to come together and network in smaller groups.

Members attending AusRAIL Live & On Demand also benefited from six months of ongoing access to conference content via the online platform to extend their professional development beyond the event itself.

AusRAIL PLUS returns to its traditional face-to-face format in Brisbane in December 2021.



Australasian Rail Industry Awards

The Australasian Rail Industry Awards moved online in 2020, with a new 'made for TV' format bringing together people from across the country to celebrate the best and brightest of the industry.

Members held #zoomformal events across the country to mark the occasion, livestreaming from homes and offices to join in the celebrations.

The awards once again featured outstanding examples of leadership, innovation and collaboration from every aspect of the rail industry.

The awards return to a face-to-face format in Melbourne in September 2021.

Boardroom events

We commenced our new boardroom events program in 2020, bringing together small numbers of senior industry representatives to discuss the major issues facing their organisations. The first events as part of the series were held in Sydney and Adelaide.

These targeted, invite-only events were designed to maximise members' networking opportunities at the senior level and bring together key decision makers to advance discussions that will be critical to the industry's future.

The boardroom events program will be expanded in 2021 to deliver more opportunities for senior representatives to network and share.

Young Rail Professionals Network

The Young Rail Professionals Network, together with the Young Leaders Advisory Board (Y-LAB), hosted a virtual trivia night, testing participants general and industry knowledge in a fun and interactive format.

The evening provided a rare opportunity for young rail professionals to come together and network during the year.

Women in Rail Conversations

We launched our Women in Rail Conversations webinar series in 2020, bringing together women in senior roles from across the industry to discuss the importance of gender diversity in rail.

These highly popular online events reflected the strong interest in improving the diversity of the rail workforce as the industry prepares for the next wave of growth.

The series was an initiative of the Women in Rail Advisory Committee and will continue in 2021.

LinkedIn networking groups

Dedicated LinkedIn networking groups for the Women in Rail Network and Young Rail Professionals Network provided the opportunity for informal networking and information sharing throughout the year.

The groups are open to anyone working in ARA member organisations, with members encouraged to share content and engage in discussions with the network.

The ARA will continue to build its online community in 2021.

CONNECT WITH THE ARA

The ARA has a significant program of work planned in 2021, with new initiatives to be implemented throughout the year. There are a range of ways you can stay up to date with all the latest industry news.

Connect with us on social media

Join us on social media for regular updates from across the industry. Our LinkedIn page features regular updates on the ARA's activities, while you can also find us on Twitter, Instagram and Facebook.

Join our networking groups

Join our Women in Rail Network and Young Rail Professionals Network groups on LinkedIn to join targeted discussions about forging rich and rewarding careers in rail. You must work for a member organisation to join the groups.

Attend our events

Our traditional events program returns in 2021, so join us at our conferences, forums and networking dinners across the country. Event information will be updated regularly on our website.

Subscribe to the Weekly Update

Our Weekly Update newsletter provides all the news and information you need to know if you are working in the rail industry. Find out about the ARA's latest work, upcoming events and the latest industry news, delivered to your inbox every Thursday.

Visit our website

View our website for all the latest news and information from the ARA. Members can also log in to access member-only content and discounted event prices, to help them make the most of their membership.

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YOUNG LEADERS ADVISORY BOARD

The Young Leaders Advisory Board (Y-LAB) continued to progress a range of initiatives in 2020.

Y-LAB built on its focus on sustainability as a key priority area, mapping the ARA's existing activities against the Sustainability Development Goals to identify areas of existing strength in this field. The outcomes of this process were tabled with the Sustainability Committee upon its establishment later in the year. This foundational piece of work helped identify opportunities to expand the ARA's sustainability agenda in the future. Y-LAB will continue to consult closely with the Committee in 2021 as it progresses the development of case studies highlighting the industry's sustainability credentials.

Y-LAB was also a key contributor to the ARA's new Faces of Rail campaign as part of its commitment to promote the attraction and retention of young people to the industry. The campaign highlights the benefits of working in rail through personal profiles and has featured a number of Y-LAB members.

In a year of change, Y-LAB also led the ARA's efforts to connect with young rail professionals through the development of new online networking opportunities. Y-LAB coffee chats provided targeted networking sessions to help young people connect with their peers while working from home. Y-LAB also supported the hugely popular Young Rail Professionals Network Virtual Trivia Night during the year.

