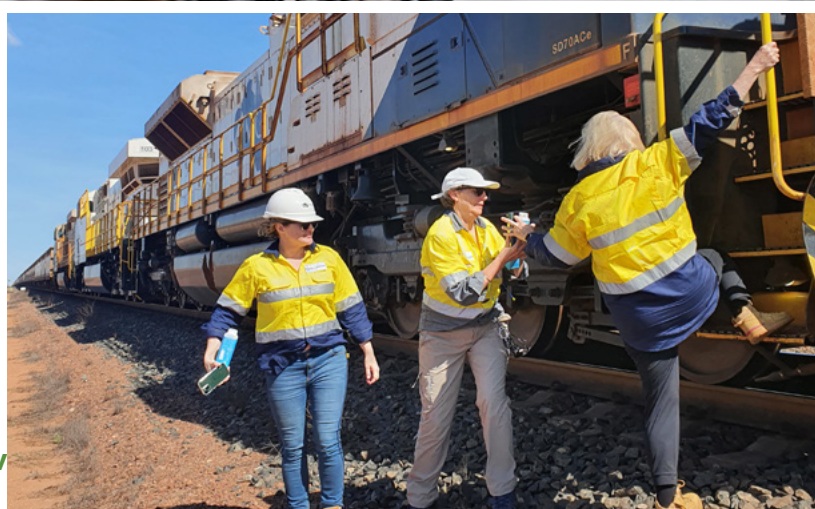
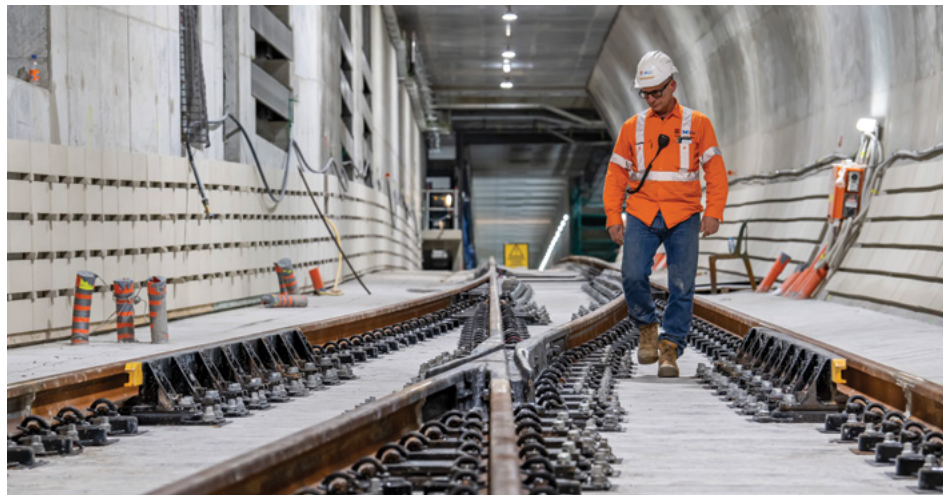


# ANNUAL REVIEW

2023

[ARA.NET.AU](http://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 220 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 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.

[www.ara.net.au](http://www.ara.net.au)





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# BOARD CHAIR MESSAGE

The rail industry in Australia and New Zealand is undergoing transformative change with unprecedented investment that will bring about enormous benefits to the sector and the wider community.

There is no better time to realise the ARA's vision for a thriving rail industry enabling economic growth and driving sustainability. In 2022-23, we set new strategic priorities to support our growing membership, with a particular focus on workforce development, sustainability, and productivity and efficiency.

The ARA Board has welcomed six new Directors this year, ensuring all aspects of the industry are well represented. Our membership has also grown to more than 220 organisations, stretching from the Pilbara in Western Australia to Auckland and Wellington in New Zealand, bringing many committed voices to the table.

The ARA team continues to work hard on behalf of its members, collaborating with government and industry, to advocate for improved outcomes and support the growth and development of all sectors of our industry.

One of the key areas of focus for the ARA is the need for a national approach to the operation of the rail network to enable interoperability and drive efficiencies. The ARA was very pleased to sign a Memorandum of Cooperation document with several Transport Ministers including to date the Federal Minister for Infrastructure, Transport, Regional Development and Communities Hon Catherine King MP, Victorian Minister for Transport Hon Jacinta Allan MP and WA Minister for Transport; Planning; Ports Hon Rita Saffioti MLA in support of this goal.

We continue to work with the National Transport Commission to improve interoperability, as part of the next phase of the National Rail Action Plan and welcome the recent appointment of a Rail Manufacturing Advocate and the Rail Industry Innovation Council, of which I am a member.

I would like to thank the ARA's members for their invaluable contribution to supporting our policy agenda in 2022-23 through our various Executive Committee meetings and working groups to address a vast range of issues.

The ARA also hosted AusRAIL 2022 in Brisbane, attracting more than 3,000 local and international industry representatives to hear the latest research and innovations across all sectors of our the industry, and held successful networking dinners in several states.

We launched our Work in Rail campaign to attract more people to the industry and engaged with key stakeholders at four major careers expos, which were visited by more than 55,000 people in Sydney, Melbourne, Perth and Brisbane.

Our ongoing commitment to diversity and inclusion includes the strengthening of the Women in Rail Committee strategy to attract and retain women in rail. The importance of these efforts was recognised by the appointment of Women in Rail Committee Chair Rebecca Want to the ARA Board.

We recently welcomed new members to the Young Leaders Advisory Board (Y-LAB) after a very popular application round and look forward to hearing their ideas on the issues and priorities that matter to the emerging talent in our industry.

With a \$154 billion pipeline of rail projects over the next 15 years we are fortunate to be a part of a very exciting time in rail's history, both in Australia and in New Zealand, which is seeing a huge resurgence.

The ARA is looking forward to continuing to implement its extensive program of advocacy, policy, events and initiatives in the coming year to support the rapid growth of rail.



**DANNY BROAD**  
BOARD CHAIR



# CEO MESSAGE

The ARA has had another incredibly busy year, delivering new member services to support the rapid growth of our industry.

We now represent more than 220 member organisations across Australia and New Zealand, with more organisations joining us this year in recognition of the important role the ARA plays in advocating for improved industry outcomes, bringing thought leaders and decision makers together, and fostering collaboration and innovation in rail.

The year has seen many of our projects to support the growth and development of the industry reach critical new phases, from the launch of key initiatives to the delivery of new research, events and programs.

## OUR NEW STRATEGIC PLAN

The ARA Board launched a new strategic plan in 2022, identifying five strategic priorities for the next three years. The update provided an opportunity to reflect on changing priorities following the experience of the pandemic and the continued growth of the industry since the previous strategy was set in 2019.

Sustainability was identified as a strategic priority for the first time, recognising the increased focus on this crucial issue across Australia and New Zealand over the past few years. Workforce development remained a priority as we continue to work to address critical skills gaps. Ensuring a productive, safe and efficient industry was also confirmed as a key priority.

It was pleasing to see the strategic plan reflects the priorities already being progressed within the ARA on behalf of our members, while also providing an opportunity for greater focus on some of the key issues facing rail over the next few years.

The ARA team is now implementing the strategy together with our members.

## POLICY AND ADVOCACY OUTCOMES

We have continued to develop new research to support our policy and advocacy work this year, with new reports on local content policies, type approvals, passenger rail patronage and the Australian market outlook released during the year.

Of course, our published reports are only a small part of our advocacy, and we have continued to progress a significant agenda through our committees and working groups during the year. We were pleased to work in partnership with the Office of the National Rail Safety Regulator on the release of a new rail safety data strategy, and confirm a Memorandum of Cooperation with the Federal, Victorian and WA governments to support improved interoperability in rail.

The ARA has also been engaging closely with government on a range of issues, including identifying solutions to support the resilience of the rail freight network, supporting the development of the National Rail Manufacturing Plan and highlighting the essential role rail plays in the decarbonisation of our transport networks.

We are continuing to work in partnership with members, industry and government on these key policy issues.

## EVENTS AND PROGRAMS

The year represented a strong return to our regular events and programs following the disruptions associated with the pandemic in previous years.

AusRAIL 2022 took place in Brisbane and surpassed our expectations, with more than 3000 people attending the event. We have had incredibly positive feedback about many of the new features we introduced to the event this year to maximise business development and networking opportunities throughout the conference. AusRAIL PLUS 2023 takes place in Sydney in November and we are looking forward to building on these improvements at the event.

Our new Introduction to Rail Signalling course was also launched this year, with our first cohort selling out. It is clear there is strong industry demand for introductory courses such as this and we expect participants will finish the course with a much stronger understanding of signalling and the essential role it plays in rail operations. We are exploring additional courses in the year ahead, while our Understanding Rail online course continues to be extremely popular.

## BOARD CHANGES

The ARA was delighted to welcome Transdev Australia and New Zealand Chief Operating Officer Peter Lensink, KiwiRail Chief Executive Officer Peter Reidy, Downer Executive General Manager, Passenger South, Adam Williams, Keolis Downer Chief Executive Officer Julien Dehornoy, GHD Market Leader Transport for Sydney Rebecca Want and Pacific National CEO Paul Scurrah to the Board in 2022-23.

The appointments broaden our industry representation, particularly in New Zealand where we have welcomed several new members this year.

We farewelled Knorr-Bremse Managing Director Michael McLellan, outgoing Keolis Downer Chief Executive Officer David Franks, Hitachi Australia Managing Director Michael Miller and Metro Trains Melbourne Chief Executive Officer Raymond O'Flaherty from the Board during the year. Michael, David, Michael and Raymond made invaluable contributions to the ARA during their tenures and I extend our sincere thanks for their contribution.

## THE YEAR AHEAD

With several new team members joining us in 2022-23 to build our capacity to deliver the strategic plan, the ARA is planning a significant program of work in 2023-24 to support the industry's continued growth and success. We look forward to sharing our progress as the year unfolds and hope to connect with you through our committees, events and programs.



**CAROLINE WILKIE**  
CEO

# 2022 HIGHLIGHTS

## MEMBER ENGAGEMENT



More than 220 members across  
Australia and New Zealand



New strategic plan launched to  
deliver on member priorities



Six new Board members,  
expanding industry representation



18,600+

More than 18,000  
LinkedIn followers



20 Executive Committees meetings  
and 140 other meetings and  
workshops

## EVENTS AND PROGRAMS HIGHLIGHTS

### AUSRAIL

3000+ people attended  
AusRAIL in Brisbane



1200+ people attended state  
industry networking dinners  
across the country



180 people joined the  
ARA-led Australian delegation to  
InnoTrans



Sold out Women in Rail events in  
Brisbane and Melbourne



280 people took part in  
Understanding Rail online course



New Introduction to Rail Signalling  
online course introduced



First Rail Freight Conference held  
in Brisbane

## KEY DATES AND MILESTONES



### JUNE 2023

- NZ Rail Industry Networking Dinner and strategic workshop.
- Adam Williams joins the ARA Board



### MAY 2023

- Paul Scurrah joins ARA Board



### APRIL 2023

- Work in Rail campaign launched
- Rebecca Want joins ARA Board



### MARCH 2023

- MoC to support rail interoperability across Australia with Federal and Victorian governments
- 2023 Benefits of a National Local Content Policy launched



### OCTOBER 2022

- Estimating the Economic Cost of Type Approval Processes in the Australian rail industry report released



### NOVEMBER 2022

- Peter Lensink and Peter Reidy join ARA Board



### DECEMBER 2022

- Return to Rail research released
- Australian Rail Market Outlook released
- AusRAIL 2022 takes place in Brisbane



### FEBRUARY 2023

- ARA meets with National Transport Commission, Office of the National Safety Regulator, International Union of Railways



### SEPTEMBER 2022

- ARA hosts Australian delegation to InnoTrans
- ARA helps celebrate the largest ever Australasian Rail Industry Awards Gala Dinner
- Towards a National Local Content Policy report released



### AUGUST 2022

- ARA takes part in Rail Safety Week



### JULY 2022

- ARA and Office of the National Rail Safety Regulator launch Australia's new rail safety data reporting scheme



# OUR BOARD

The ARA Board is made up of senior industry leaders that represent all facets of our diverse membership base.

## GENERAL DIRECTORS



**DANNY BROAD**  
CHAIR, AUSTRALASIAN RAILWAY  
ASSOCIATION (ARA)



**CAROLINE WILKIE**  
CHIEF EXECUTIVE OFFICER,  
AUSTRALASIAN RAILWAY  
ASSOCIATION (ARA)



**HOWARD COLLINS OBE**  
SECRETARY FOR TRANSPORT FOR  
NSW (ACTING)



**STEVE BUTCHER**  
EXECUTIVE GENERAL MANAGER  
AND MANAGING DIRECTOR RAIL  
AND TRANSPORT DIVISION,  
JOHN HOLLAND GROUP



**CARYN ANDERSON**  
EXECUTIVE GENERAL MANAGER,  
PORT OF MELBOURNE



**MARK CAMPBELL**  
MANAGING DIRECTOR AND  
CHIEF EXECUTIVE OFFICER,  
AUSTRALIAN RAIL  
TRACK CORPORATION (ARTC)



**MURRAY COOK**  
CHIEF EXECUTIVE OFFICER,  
ARC INFRASTRUCTURE



**JULIEN DEHORNOY**  
CHIEF EXECUTIVE OFFICER,  
KEOLIS DOWNER



**ANNA SQUIRE**  
AUSTRALASIA RAIL BUSINESS  
LEADER, ARUP



**KAT STAPLETON**

CHIEF EXECUTIVE OFFICER,  
QUEENSLAND RAIL



**REBECCA WANT**

TRANSPORT MARKET LEADER  
FOR SYDNEY, GHD



**PETER REIDY**

CHIEF EXECUTIVE OFFICER,  
KIWIRAIL



**PAUL SCURRAH**

CHIEF EXECUTIVE OFFICER,  
PACIFIC NATIONAL

## SECTOR DIRECTORS - CHAIRS OF THE ARA'S EXECUTIVE COMMITTEES



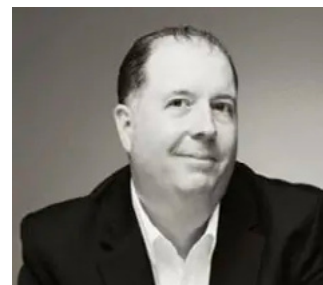
**RICHARD COHEN**

MANAGING DIRECTOR PORT,  
RAIL & CORE SERVICES - IRON  
ORE, RIO TINTO  
HEAVY HAUL EXECUTIVE  
COMMITTEE (HHEC)



**PETER LENSINK**

CHIEF OPERATING OFFICER,  
TRANSDEV AUSTRALIA AND  
NEW ZEALAND  
PASSENGER OPERATORS  
EXECUTIVE COMMITTEE (POEC)



**JOHN MCARTHUR**

CHIEF EXECUTIVE OFFICER AND  
MANAGING DIRECTOR, ONE  
RAIL AUSTRALIA HOLDINGS LTD  
RAIL FREIGHT EXECUTIVE  
COMMITTEE (RFEC)



**JULIAN SHARP**

PROJECT DIRECTOR,  
CPB CONTRACTORS,  
RAIL INFRASTRUCTURE  
CONTRACTORS EXECUTIVE  
COMMITTEE (RICEC)



**ADAM WILLIAMS**

EXECUTIVE GENERAL MANAGER,  
PASSENGER SOUTH, DOWNER  
RAIL INDUSTRY EXECUTIVE  
COMMITTEE (RIEC)

# OUR STRATEGIC PLAN

The ARA's strategic plan guides our work to support our members and advance issues of importance to the rail industry. The ARA Board approved the strategic plan in 2022.

## Our Vision

A thriving rail industry enabling economic growth and driving sustainability.

## Our Mission

Collaborate with members, industry and government to build industry capability, harmonisation, workforce development and sustainability.

## Strategic Objectives



Leading industry voice



Exceptional member experience



Thriving, diverse and skilled workforce



Productive, safe and efficient industry



Sustainable and resilient industry that benefits communities

## Operational Priorities

Sustainable operations

Strong membership

Engaging communications

Thriving team

# STRATEGIC OBJECTIVES

This section outlines how the ARA will deliver on our strategic plan and the supporting priorities for each strategic objective.

## LEADING INDUSTRY VOICE

Continue our evidence-based research to lead the debate on the key issues that impact rail and advocate for policy solutions to improve the operating environment for rail.

- Be the trusted voice of the rail industry in Australia and New Zealand
- Lead national debate on key issues that impact rail
- Identify and develop evidence-based research aligned with member priorities
- Advocate for policy solutions on member issues to improve the operating environment for rail
- Develop valuable industry data and insights to inform decision making
- Partner with key industry bodies on shared priorities



## EXCEPTIONAL MEMBER EXPERIENCE

Deliver leading services including events, courses and insights to support our members' diverse and evolving needs and support knowledge transfer and industry engagement.

- Provide diverse event offerings for members to network, share knowledge and create valuable relationships across industry
- Provide courses to support education and information transfer within the rail sector
- Provide valuable member engagement with opportunities for member participation
- Deliver informative insights and useful resources for industry



## THRIVING, DIVERSE AND SKILLED WORKFORCE

Showcase the range of rewarding careers in rail and lead the development of national courses and competency management to support a strong and diverse rail workforce for the future.

- Showcase inspiring career pathways to attract and retain a skilled rail workforce
- Support the development of a national approach to courses, training and competencies
- Provide professional development and networking opportunities
- Support members to foster a diverse and inclusive workforce
- Deliver the Rail Industry Worker Program for workforce competency management, safety assurance and productivity





## PRODUCTIVE, SAFE AND EFFICIENT WORKFORCE

Advocate for national approaches to procurement and the harmonisation of standards and regulations to ensure greater productivity and efficiencies for both the rail industry and the associated supply chain.

- Campaign for more efficient procurement and a national approach to local content, prequalification and type approvals
- Advocate to harmonise regulation and standards for greater productivity and efficiency
- Engage in state and Commonwealth government processes to support a thriving rail supply chain
- Facilitate collaboration in industry innovation, research and development
- Represent industry on national rail safety policy issues



## SUSTAINABLE AND RESILIENT INDUSTRY THAT BENEFITS COMMUNITIES

Lead the regional dialogue to accelerate emissions reduction in the rail industry and the inherent sustainability benefits rail delivers.

- Showcase the inherent sustainability benefits rail delivers
- Lead the national dialogue to accelerate emissions reduction in the rail industry
- Foster a culture of sustainability leadership to embed sustainable practices across the rail supply chain
- Advocate for a resilient rail network that meets the needs of future generations
- Champion diversity and inclusion in the rail industry, and support infrastructure planning that meets diverse community needs



# KEY POLICY ISSUES

The ARA has implemented a wide range of measures in line with its key policy priorities in 2022-23. A significant focus on harmonising the rail industry, workforce development and sustainability has been progressed throughout the year and are detailed in the following pages.

## **SUPPORTING RAIL INTEROPERABILITY**

A key focus spanning the ARA's portfolios during the year was advocating for improved interoperability across the rail network to streamline operations and support national consistency in the industry.

The ARA signed memorandums of cooperation with Federal Minister for Infrastructure, Transport, Regional Development and Communities Hon Catherine King MP, Victorian Minister for Transport Hon Jacinta Allan MP and WA Minister for Transport; Planning; Ports Hon Rita Saffioti MLA to support this goal.

The signing of the Memorandum of Cooperation (MoC) supported broader work with the National Transport Commission to improve interoperability, in line with the next phase of the National Rail Action Plan. Further information on specific initiatives that support greater national consistency in rail can be found in the rail freight and supply chain sections of this document.

## **SUBMISSIONS**

The ARA made several submissions on key issues facing the industry during the year. Submissions included:

- ARA submission – Reforms of the Disability Standards for Accessible Public Transport (Stage 2) – Consultation RIS (9 August 2022)
- ARA submission – Independent Review of Infrastructure Australia (15 August 2022)
- ARA submission – Exploring the future use of the 1880-1920 MHz band, ACMA (19 October 2022)
- ARA submission – Independent Review of Inland Rail (11 November 2022)
- ARA submission – Employment White Paper, Australian Government (30 November 2022)
- ARA submission – Pre-Budget 2023-24, Treasury (31 January 2023)
- ARA submission – National Reconstruction Fund: Consultation Paper (7 February 2023)
- ARA submission – Replanning of the 1880-1920 MHz band, Options Paper (17 March 2023)
- ARA submission – Developing Advanced Manufacturing in Australia (30 March 2023)
- Replanning of the 1880-1920 MHz band Reply to comment period: feedback on submissions (21 April 2023).
- ARA submission – ACMA draft FYSO 2023-28 (11 May 2023)







# PASSENGER RAIL

The ARA supported the industry's efforts to promote increased patronage after the pandemic and provided new opportunities for members to network and share information on a range of issues facing the passenger sector.

The year marked a shift from the immediate COVID-19 recovery to adjusting to a 'new normal' as work patterns changed. The increasing number of new rail projects underway also saw a growing focus on managing disruptions and supporting the smooth integration of new projects into the existing network.

The ARA released new consumer research to assess passengers' likelihood to increase their use of rail in 2022. The survey of 2500 people across Australia found 25 per cent of people expected to use rail more as cost of living pressures rose and people started to get out more for events and activities following the end of COVID-19 restrictions.

The survey highlighted the importance of frequent, convenient services in encouraging greater use of rail, confirming the value of new rail projects underway to increase capacity across the network.

The research also found strong recognition of the sustainability benefits of rail, with two-thirds of participants considering greater use of rail to reduce their carbon footprint.

The ARA released the research in December to inform its work to promote increased patronage. Further work is now underway to develop tools to showcase the sustainability benefits of rail transport and promote wider use of rail in the community.

## INCREASING RAIL PATRONAGE

**25%**  
of people  
are likely to  
increase their  
use of rail



Increasing cost of living pressures key drivers likely to support greater use of rail

Frequent, easy and convenient services would encourage people to use rail more

**43%**

More frequent services

**37%**

More express services

**36%**

More visible security

**31%**

Loyalty program for frequent travellers

**30%**

More regular cleaning on trains/ trams

**28%**

Seamless connection to bus services at stations

Two-thirds of people consider rail the most sustainable form of transport

**66%**

Rail

**14%**

Bus

**8%**

Another mode

**7%**

Ferry

**4%**

Taxi/rideshare

### NEW OPPORTUNITIES FOR INFORMATION SHARING

The Passenger Operators Executive Committee (POEC) reviewed its committee structure during the year, creating two new networks to support collaboration and information sharing throughout Australia and New Zealand.

A Cybersecurity Network was established to share information on this growing area of focus, with members sharing experiences and best practice on cybersecurity issues. The first meeting was held in March, with the Network to meet quarterly.

An Operations Network was also established to support information sharing on a range of operations issues including managing disruptions, investment in ageing infrastructure, integrating new projects and operational efficiency. The first meeting took place in May, with the Network to meet quarterly. An operations workshop will be held in 2023-24 to further explore the Network's priority areas of focus.

### SUPPORTING AN ACCESSIBLE NETWORK

The ARA has continued to participate in the modernisation of the Disability Standards for Accessible Public Transport 2002 (DSAPT). The standards have not been reformed since their release in 2002, and the ARA continues to work with members on the reform process being co-led by the Australian Government and the Department of Transport and Main Roads Queensland.

The Australian Human Rights Commission also made a decision to grant all requested temporary exemptions from the DSAPT and Disability (Access to Premises – Buildings) Standards 2010 to participating ARA members, providing clarity for members while the reform process continues.

In June, the ARA will provide its submission to the 2022 DSAPT review, which the ARA's Accessibility Committee has been closely involved in.

### LEADING INDUSTRY ENGAGEMENT ON SPECTRUM LICENCE RENEWALS

The ARA commenced engagement with the Australian Communications and Media Authority (ACMA) on upcoming consultation on the renewal of the 1.8GHz band. Formal consultation on the licence renewal process is expected to commence in 2023-24. The ARA held a workshop with ACMA representatives and the ARA's Telecommunications Committee members in late 2022 as planning got underway for the consultation process.

The ARA also made several submissions to ACMA on replanning of the 1880 – 1920 MHz band, which has the potential to be applied to emerging telecommunications technologies used in the rail industry.

### PROVIDING OPPORTUNITIES FOR DATA SHARING

The ARA's Anti-social Behaviour Network commenced a review of its Threat Controls Library to support information sharing and collaboration on mitigation measures to address anti-social behaviour. The library is being expanded to include fare evasion measures, to be developed in consultation with the ARA's Revenue Protection Network.

The project is underway and will be completed in late 2023.





# RAIL FREIGHT

Key rail freight projects commenced this year to support the long-term sustainability of the national freight network. This included a strong focus on rail freight productivity and sustainability.

## RAIL FREIGHT RESILIENCE

The ARA progressed a joint project on rail freight resilience this year, partnering with the Freight on Rail Group (FORG), Australian Rail Track Corporation (ARTC), Arc Infrastructure and One Rail Australia. The initiative identified six projects across the national network that were critical to improving the resilience of the rail freight network in the face of extreme weather events.

Economic analysis conducted by Houston Kemp was incorporated into the research, confirming the significant

economic impact of recent flooding events. Progressing the identified projects would reduce the number of outages associated with weather events, while also providing alternative routes in high-risk areas to support the continuity of services.

The ARA lodged a pre-budget submission seeking funding for business cases for the project and have implemented an extensive engagement plan with Federal Government representatives to support the submission. This work will continue in 2023-24.



### Improve resilience

To make the rail freight network better able to withstand extreme weather events



### Improve redundancy

To reduce the impact of extreme weather events by providing alternative routes in high-risk areas



## RAIL FREIGHT PRODUCTIVITY

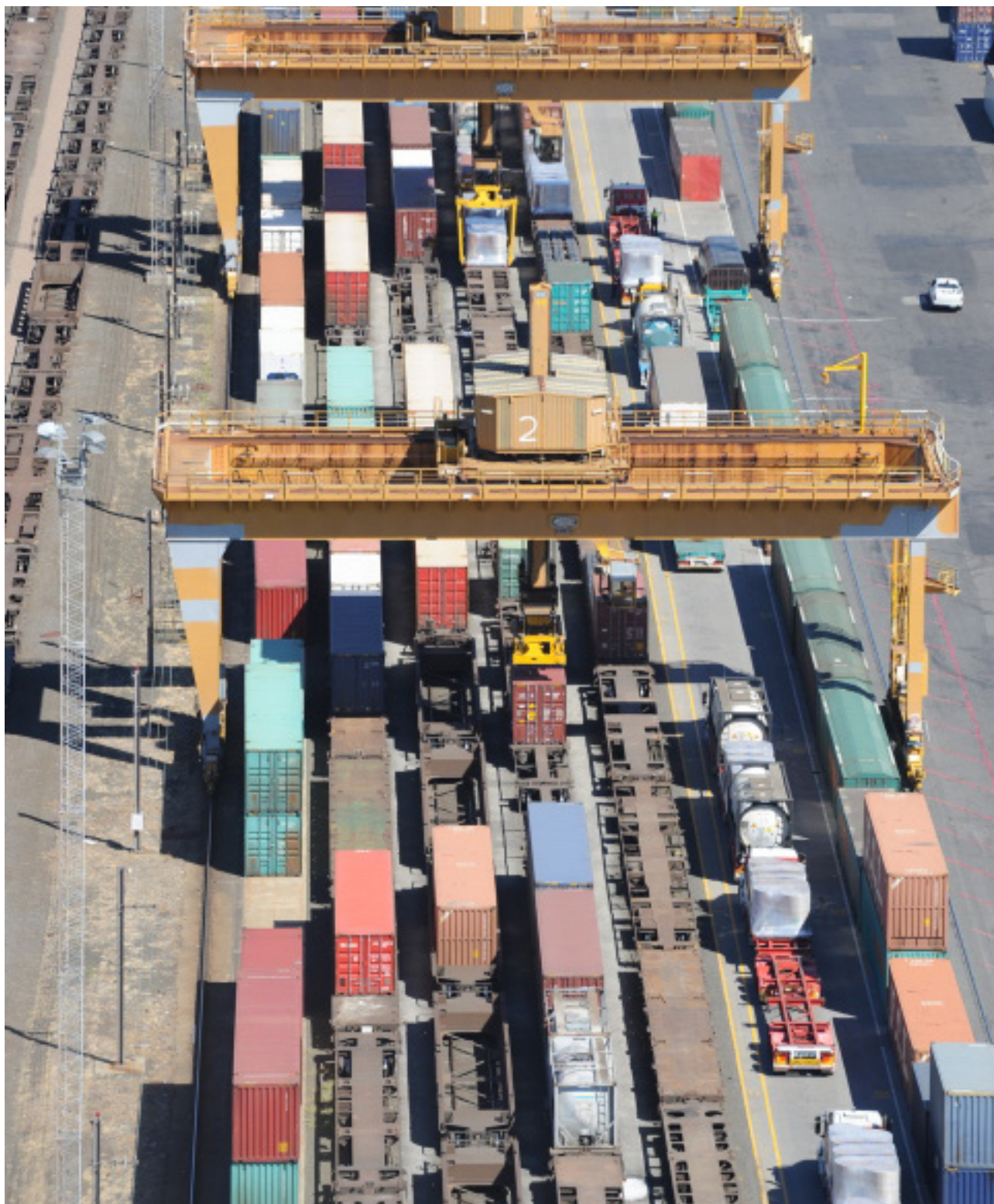
The ARA joined forces with the Australasian Centre for Rail Innovation (ACRI) and FORG to complete new research on rail freight productivity. Extensive industry engagement on the research findings was completed, before a public facing national engagement strategy was initiated in 2023.

With rail freight to meet almost three quarters of new demand to 2030, improving the productivity and efficiency of the network is essential to support our future needs.

## SUPPORTING RAIL INTEROPERABILITY

The rail freight sector has supported a continued strong focus on improving interoperability in the rail industry. The ARA has engaged with the National Transport Commission throughout the year on opportunities for improved interoperability, particularly in areas where changes would improve outcomes for freight operators working across jurisdictions.

The ARA welcomed the strong focus on interoperability as part of the next phase of the National Rail Action Plan (NRAP) and will continue to be actively engaged in the NRAP process.







# HEAVY HAUL

The Heavy Haul Executive Committee has progressed its skills and sustainability agenda throughout the year, providing new opportunities for collaboration between heavy haul operators.

## **ASSESSING TRAINING NEEDS**

The ARA hosted a Heavy Haul Training Needs Analysis Workshop in March to determine key gaps between current and future workforce needs, and how to address them. The workshop provided a strong opportunity to understand the emerging skillsets that will be required to support new, more sustainable operating practices, including the adoption of new rollingstock technologies. The findings of the workshop will inform further work in 2023-24 to deliver solutions to attract and develop the skills needed to support the industry's transition to decarbonisation.

The workshop also saw heavy haul operators in Western Australia agree to adopt the Rail Industry Worker program to support the management of competencies on site.

## **HEAVY HAUL DECARBONISATION WORKING GROUP**

The Heavy Haul Decarbonisation Working Group also got underway during the year, confirming a focus on collaboration and information sharing around rollingstock trials underway to decarbonise heavy haul rail operations. While the working group will primarily be focused on issues specific to the heavy haul sector, it will connect with the broader Rollingstock Decarbonisation Working Group to support broader information sharing across the rail industry over time.



The ARA toured the operations of a number of heavy haul members in the Pilbara region of Western Australia in 2022 to identify key priorities for the Heavy Haul Executive Committee. The visit highlighted the importance of skills development, sustainability and technology

A photograph of a railroad crossing. In the foreground, a red and white striped barrier is lowered across the tracks. Behind the barrier, a brown freight train is stopped. The train consists of several open-top hopper cars. One car has the number "6428" painted on its side. Another car has the number "349" visible. A signal post stands in the middle of the tracks, featuring two large red circular lights and a crossbuck sign that reads "RAILROAD AHEAD". The sky is blue with some light clouds. The ground in the foreground is asphalt with white painted lines.







# SUPPLY CHAIN

New research fuelled a significant advocacy program to support the ARA's supply chain members during the year, with a key focus on a national approach to local content, procurement and type approvals.

## RAIL INDUSTRY OUTLOOK

The ARA updated its Australian Rail Market Outlook in 2022, releasing new analysis by BIS Oxford Economics in December. The report found rail construction and maintenance activity had reached a record \$12.9 billion in 2021-22 and was set to continue to rise. Activity is expected to average \$14.4 billion per year over the next five years.



The report confirmed a strong long-term pipeline, with \$154 billion in activity planned over the next 15 years. The findings highlighted the importance of skills development and efficient procurement processes to ensure the industry is able to deliver the significant pipeline ahead.

## NATIONAL RAIL MANUFACTURING PLAN

The ARA welcomed the Federal Government's commitment to establish a National Rail Manufacturing Plan to build capability and capacity in the Australian rail manufacturing sector. The development of a national approach is consistent with a range of research reports released by the ARA since 2020 and reflected the growing recognition of the importance of a strong local manufacturing capability emerging from the pandemic.

The ARA has engaged closely with Government on the development of a national rail manufacturing plan and a Rail Manufacturing Advocate has now been appointed. The ARA will continue to work with government and industry on this issue in 2023-24.

## NATIONAL LOCAL CONTENT

The ARA launched its Towards a National Local Content Policy report in 2022, confirming the significant benefits that can be realised by moving to a national approach instead of current state-based policies in place across Australia.

Further research was then commissioned by the ARA to complete a quantitative analysis of the impact of local content policies currently in place. The findings were formally launched by Assistant Minister for Manufacturing and Trade Senator the Hon Tim Ayres, who toured Pandrol's Blacktown facilities in March to discuss the importance of a strong rail manufacturing sector.



The research found governments had missed out on \$1.85 billion in cost savings associated with rollingstock procurement over the past decade as a result of inefficient local content policies.

## NATIONAL TYPE APPROVALS PROCESS

The ARA led joint research with the Rail Industry Safety and Standards Board on the benefits of a national type approvals process, releasing its report in 2022. The report found inefficient type approval processes cost the industry \$230 million per year, with significant duplication required between operators and jurisdictions. Current processes were also limiting innovation by making it harder to approve new solutions.

The report recommended creating nationally consistent standards for products that are used to maintain



the status quo to make it easier to maintain existing operations, save time and address inconsistencies across the industry. This approach would also allow more time to be focused on approving new solutions and innovation to drive wider improvements in the industry.

The ARA has also supported an initiative by Transport for NSW to lead the development of a national type approvals framework. The ARA took part in industry consultation sessions that informed the framework's development and facilitated further engagement with its members. The framework represents a good example of industry-led solutions to address common challenges experienced across jurisdictions. The ARA's Rail Infrastructure Contractors Executive Committee and Rail Industry Executive Committee both formally endorsed the framework in March.



**\$230 million in additional costs per year**



**Significant duplication with different processes required for each jurisdiction or operator**



**Limiting innovation by making it harder to approve new solutions**

## NATIONAL PRE-QUALIFICATION

The ARA developed an initial pre-qualification business case to explore the adaptation of AusRoads' national pre-qualification scheme for medium to large rail construction projects during the year. The ARA has engaged with AusRoads and the National Transport Commission on the proposed approach and will complete a further economic analysis to confirm the potential cost savings that could be realised as a result of adopting this approach.

Further consultation with industry and government stakeholders is expected to continue in 2023-24.

## RESEARCH AND DEVELOPMENT FOCUS

The ARA established a Research and Development Working Group to support the development of an online capability directory to raise awareness of local research and development expertise. The directory will be housed on the ARA website and delivered in 2023 as part of the ARA's commitment to supporting a national approach for research and innovation in rail.





# SUSTAINABILITY

The ARA has furthered its commitment to sustainability during the year, naming this crucial area of focus as one of its five strategic priorities. The implementation of the ARA's first sustainability strategy also entered its second year.

## JOURNEY TO NET-ZERO

The ARA released its Journey to Net-Zero report in partnership with Roads Australia and Infrastructure Sustainability Council in June 2022, including 48 recommendations. The ARA has engaged with members and key stakeholders on the report's recommendations

since its release to support the acceleration of decarbonisation efforts in the transport sector.

Further opportunities for wider industry engagement with infrastructure sector partners were explored during the year.



Placemaking is the first step to a sustainable transport network



The greatest potential for emissions reduction is at the planning stage and requires industry and government to work together



Collaboration, capacity building and education will help create new solutions for the transport sector



New policy, investment and incentives are needed to support an efficient, sustainable and resilient transport system



Circular and whole-of-life thinking should inform decision making and materials selection



Innovation and technology will play a key role in decarbonising the transport sector



## ACCELERATING ROLLINGSTOCK DECARBONISATION

The ARA established a new Rollingstock Decarbonisation Working Group during the year to advocate for policy changes required to accelerate rollingstock decarbonisation in Australia and New Zealand. The working group builds on the recommendations of the Journey to Net-Zero report, which highlighted the importance of phasing out diesel trains.

The working group includes passenger and freight operators, manufacturers and consultants to provide a holistic view of the decarbonisation challenge. It has completed a review of decarbonisation policies across the country and agreed to develop a critical path to support rollingstock decarbonisation, including consideration of policy and regulatory issues that may be required to support this.

## CIRCULAR ECONOMY WORKSHOP

The ARA hosted its first Circular Economy Workshop in March as part of the implementation of its sustainability strategy. The half-day workshop, supported by Arup, examined best practice circular economy initiatives in the rail industry and discussed opportunities to maximise the use of recycled materials.

An outcomes report was developed based on member feedback from the workshop, and a Circular Economy Working Group was subsequently established to progress these actions. The working group is focused on supporting collaboration and information sharing, while advocating for a national approach to circular economy initiatives in the rail industry.



## SUPPORTING A FOCUS ON BIODIVERSITY

The ARA established a Biodiversity Network during the year, with its first meeting held in May. The Network will meet quarterly to share information on biodiversity issues facing the industry. The development of the Network fulfils an action from the sustainability strategy and builds on member feedback that this is a growing area of focus within the industry.

## PROVIDING GUIDANCE FOR INDUSTRY

The ARA commenced a new project to develop a sustainability guide for industry, including advice for rail organisations of all sizes to advance their sustainability agenda. The guide will highlight best practice from across the industry and provide practical guidance for those seeking to increase their focus on environmental sustainability. The guide is expected to be launched later in 2023.

## FOCUS ON DIVERSITY

The Women in Rail Committee commenced a review of its strategy to support a continued focus on attracting and retaining more women to the industry. The appointment of the Women in Rail Committee Chair Rebecca Want to the ARA Board strengthened the ARA's focus on diversity and inclusion. The ARA completed a review of policies around issues such as parental leave and flexible work during the year to support best practice guidance for industry. Further research on overcoming obstacles to greater diversity is also planned in 2023-24.

The ARA continued to broaden its focus on diversity and inclusion as part of its sustainability strategy commitments. Planning is underway to commence research on indigenous participation and engagement in the industry as part of the strategy's implementation.







# WORKFORCE DEVELOPMENT

Workforce development was confirmed as one of the ARA's strategic priorities, as the focus on meeting immediate and longer-term skills needs in the industry came into sharper focus during the year. The ARA has progressed a range of initiatives to support the attraction, retention and development of skilled people to the industry.

## WORK IN RAIL

The ARA launched its Work in Rail campaign to promote rail careers, highlighting the significant opportunities that exist within the growing industry. The campaign was launched by Federal Minister for Skills and Training Brendan O'Connor in April.

The campaign is centred around the Work in Rail website, which features 80 different careers within the industry, outlining details of each role, as well as training and education pathways, salary data and links to current job vacancies.



The campaign will help inform school and higher education students about opportunities in the rail industry, while also helping those already working in other industries to identify roles that would suit their existing skills.

Website users can take a self-assessment quiz to find roles that best suit their interests and access information on rail industry employers. Profiles on people working in rail and broader information on the industry and its people is also available.

The ARA also hosted a Work in Rail stand at careers expos in Melbourne, Perth, Brisbane and Sydney, providing an opportunity to engage directly with school leavers on the opportunities available in the rail industry. Members were invited to join the ARA at the expos to showcase specific roles available in rail.

These four expos attracted more than 55,000 people:

- VCE and Careers Expo, Melbourne had 20,410 over three days.
- Perth Careers Expo + VET Expo had 11,433 over four days.
- Brisbane Careers and Employment Expo had 13,286 over two days.
- HSC and Careers Expo, Sydney had 12,273 over three days.

A broader marketing strategy will be implemented in 2023-24 to support ongoing careers promotion as part of the Work in Rail campaign. Members will have the opportunity to continue to be involved in the campaign over time. To view the website, go to [www.workinrail.net.au](http://www.workinrail.net.au)

## RAIL INDUSTRY WORKER PROGRAM

The Rail Industry Worker program is the only national program of its kind in the rail industry, making it easier for rail workers to move between projects and across state borders.



The program continued to grow during the year, with heavy haul operators in Western Australia joining the program for the first time.

Now close to 100,000 rail industry workers and 11,000 rail organisations use the program to ensure the safety and competence of workers on rail sites.

The ARA also released the first of four new national matrices for signalling and electrical roles as part of the program, making it easier to recognise qualifications for these roles and reduce the need for retraining when people move to new projects or locations. This will help simplify the onboarding process for skilled workers in new roles and improve efficiency on rail projects.

A new Train Driver matrix working group was also established during the year, while work with the Engineering and Project Management working groups continues.

## EDUCATION PARTNERSHIPS

The ARA has continued to work with the education sector across Australia to build training and learning solutions that support careers in rail and help existing rail industry workers transition to new technologies.



The ARA partnered with North Metro TAFE in Western Australia to deliver more education and training opportunities in the state. The TAFE facility will now include rail skills as a key focus and will deliver the ARA's Train Driver Rail Operations Skill Set to ensure there is a pathway for people seeking a career as a train driver.

The partnership represents an important step forward for the future of rail skills. Further engagement with additional education providers will continue in 2023.

## COLLABORATION WITH THE NATIONAL RAIL SKILLS HUB (NRSH)

The ARA has collaborated with the NRSH on a number of initiatives, including the development of the national Train Driver Rail Operations Skill Set.

The NRSH and ARA also commenced planning for a Skills Forum, to bring together industry and government to explore opportunities to prepare for skills that will support more digital and decarbonised railways. The Forum will explore competency profiles, consider the potential to expand or change the skills underpinning key roles and identify new roles and education pathways required to meet future needs.

This will be a key part of the ARA's continued focus on skills development to meet both short- and long-term industry needs.

## REMSMART

The REMSMART rail remuneration survey continued during the year, with two surveys being completed to support members' attraction and retention strategies. The survey is offered as a free, member-only benefit, with participants provided access to the only rail-specific remuneration data in the country. The data includes information on salaries for rail-specific roles, as well as information on allowances, incentives and other benefits offered by rail industry employers.

## COURSE DEVELOPMENT

The ARA completed the development of its new Introduction to Rail Signalling online course this year ahead of its launch in May (see Events and Programs section for more information).

Planning also commenced for further courses to be delivered in 2023-24, with the ARA completing member consultation on areas of focus as it expands its courses offering. New courses to be delivered in the new financial year will continue to be provided in an online format to maximise their accessibility across the industry.



# Rail Safety Week



## SAFETY

### NATIONAL RAIL SAFETY DATA STRATEGY

The Office of the National Rail Safety Regulator (ONRSR) and ARA announced the launch of a new rail safety data reporting scheme in July. The scheme was delivered as part of the National Rail Safety Data Strategy and included a purpose-built system designed to deliver a consistent and quality national data set available to all stakeholders.

The launch of the team followed extensive consultation, including through the Rail Operator Steering Committee, co-chaired by the ARA and ONRSR. Both organisations have worked closely within industry throughout the year to support the implementation of the scheme and address any issues reported by industry. The ARA will continue to engage with ONRSR on the application of the scheme in 2023-24.

### NATIONAL STANDARD FOR HEALTH ASSESSMENT OF RAIL SAFETY WORKERS

The ARA worked with the National Transport Commission and Metro Trains Australia to review the National Standard for Health Assessment of Rail Safety Workers. This work has included consideration of any potential effects on the Rail Industry Worker (RIW) program, as a result of the revised standard being finalised later this year.

### NATIONAL RAIL SAFETY WEEK

The ARA once again took part in Rail Safety Week in August, joining with members from across the country to support this important initiative. The week focused on the message to 'Stay Rail Safe', with activities planned by members throughout Australia and New Zealand. Rail Safety Week is an initiative of the TrackSAFE Foundation.







# EVENTS AND PROGRAMS

The ARA held a range of events and programs to support its members throughout the year

## AUSRAIL 2022

More than 3000 people converged on Brisbane in December to take part in AusRAIL 2022. The conference featured more than 100 speakers over two days, including:

- Federal Minister for Infrastructure, Transport and Regional Development the Hon Catherine King MP
- Queensland Minister for Transport and Roads the Hon Mark Bailey MP
- Assistant Minister for Manufacturing Senator the Hon Tim Ayres
- Hitachi Global Chief Executive Officer Andrew Barr
- Pacific National Chief Executive Officer Paul Scurrah
- Queensland Rail Chief Executive Officer Kat Stapleton
- National Transport Commission Chief Executive Officer Gillian Miles
- Alstom Australia & New Zealand Managing Director Pascal Dupond

# AUSRAIL





- Transport Asset Holding Entity of NSW Chief Executive Officer Benedicte Colin
- ARC Infrastructure Chief Executive Officer Murray Cook
- ONRSR Chief Executive Officer Sue McCarrey
- KiwiRail CEO Peter Reidy
- Waka Kotahi NZ Transport Agency CEO Nicole Rosie

The event also featured an extensive industry exhibition showcasing more than 90 suppliers, highlighting new products, technologies and innovations from across the rail industry. The ARA introduced a range of features to maximise the experience of attendees during the event, including new workstations and networking zones, activations in the Exhibition Hall and social events.

More than 1100 people took part in the Yellow Dinner to conclude the conference. AusRAIL PLUS will take place in Sydney in November 2023.



## RAIL FREIGHT CONFERENCE

The ARA's inaugural Rail Freight Conference took place in Brisbane in October, providing an opportunity for the rail freight sector to discuss the key issues facing the industry. More than 150 people took part in the two-day conference, discussing a range of issues including rail freight productivity, modal shift, interoperability, sustainability and skills development.

The ARA also hosted a Women in Rail breakfast to coincide with the conference, with a panel discussion featuring key female leaders from across the rail industry.

The Rail Freight Conference will be held again in 2024.



## INNOTRANS

The ARA-led a trade delegation of more than 180 people to InnoTrans in Berlin in September. The event marked the first of its kind since the pandemic, with the ARA hosting its largest ever stand at the exhibition.

The delegation provided an opportunity to showcase the significant pipeline of infrastructure investment in Australia and New Zealand to the global industry, with ARA Chief Executive Officer Caroline Wilkie delivering a presentation on the Australian market to attendees.

The ARA hosted a number of networking events to connect delegation members with the wider market and facilitated guided tours of some of the key exhibition stands at the event.

Members were provided with the opportunity to take part in the delegation as a free member benefit. Planning is now underway for a delegation to InnoTrans 2024.



## STATE INDUSTRY NETWORKING DINNERS

Fortunately, 2022 marked the return to a regular schedule of state industry networking dinners following the pandemic, with record attendances at key events. Networking dinners were held across the country, providing an opportunity to network with key industry leaders and decision makers.

## WOMEN IN RAIL LUNCHES

The ARA's Women in Rail lunches returned, with sold out events in Brisbane in 2022 and Melbourne in 2023. The popularity of the lunches confirmed the strong demand for initiatives that support conversations around improving diversity in the industry. Further Women in Rail events are planned in 2023-24.

## AWARDS

The first face-to-face Australasian Rail Industry Awards gala dinner was held in Melbourne in October, with more than 700 people attending.

The Awards recognise and celebrate individual and company achievements in the rail industry, showcasing examples of excellence and innovation to support its growth and success.

The winners of 17 categories were announced as part of the event, with GHD Market Leader Transport Rebecca Want receiving the prestigious Career Achievement Award.

The Awards are supported by the ARA, Rail Track Association Australia, Rail Technical Society Australasia, Permanent Way Institution, Institution of Railway Signal Engineers and Rail Industry Safety and Standards Board, with proceeds going to the TrackSAFE Foundation.

Nominations for the 2023 Awards were opened in March, with winners to be named in October 2023.

## UNDERSTANDING RAIL

The highly popular Understanding Rail online course continued in 2022-23, with 280 people taking part during the year. The course provides a comprehensive introduction to the rail industry and is ideally suited to people new to the industry, changing roles or wishing to broaden their understanding of all aspects of working in rail.

The five-week course includes weekly interactive webinars featuring industry experts and ARA team members, as well as additional reading and discussions via the dedicated online platform.

The Understanding Rail online course is held twice yearly.

## INTRODUCTION TO RAIL SIGNALLING

The ARA officially launched its new Introduction to Rail Signalling online course in May, with about 60 people taking part in the first cohort. The course was created in response to industry demand for further training on this crucial aspect of the rail industry.

The five-week course provides an overview of the fundamentals of signalling and includes weekly webinars and additional tasks, reading and discussion via the online platform.

The course has proven popular with graduates, people interacting with signalling professionals and those considering a career change. The course will be held twice yearly.





## WOMEN IN RAIL MENTORING PROGRAM

The 2022 Women in Rail mentoring program concluded in December, featuring a record number of participants. The program sees females paired with male or female mentors who can share their career experiences and offer advice to support career and leadership development.

The program is delivered in a virtual format and aims to empower women to pursue rewarding careers in the industry. It is suited to mentees ready to take their next career step and also provides a rewarding development opportunity for mentors looking to make a difference and support the future of the rail industry.

The 2023 program commenced in May and will continue until February 2024.

## MEET THE INNOVATOR AND MEET THE BUYER

The Meet the Innovator and Meet the Buyer webinar series were held again this year to better connect suppliers with major rail industry purchasers.

Meet the Buyer provided suppliers with the chance to hear about upcoming tenders and areas of focus for rail operators and tier one contractors in Australia and New Zealand. This free, member-only series continues to provide a valuable opportunity for members to hear direct from potential clients on upcoming opportunities in the industry.

Meet the Innovator featured suppliers with new and innovative products, services or technologies, giving them the chance to provide a 10-minute pitch to rail industry buyers.





# CONNECT WITH THE ARA

The ARA has a significant program of work planned in 2023-24, 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.

## 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.

## 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, **Instagram** and **Facebook**.

## JOIN OUR NETWORKING GROUPS

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

Join our Work in Rail LinkedIn group to stay up to date and to access our latest content to promote rail careers.

## JOIN OUR COMMITTEES AND WORKING GROUPS

Our committees and working groups inform our policy agenda and the projects we lead on behalf of the rail industry. By being part of our committees and working groups, you can contribute to the policies and initiatives that will shape the future of our industry. For more information, see [ara.net.au/membership/member-committees/](https://ara.net.au/membership/member-committees/)

## ATTEND OUR EVENTS

Join us at our conferences, forums and networking dinners across the country. Event information will be updated regularly on our website and promoted via the Weekly Update newsletter.

### How to get involved

If you would like to get involved in an ARA committee working or networking group, or find out who from your organisation is involved, please email [ara@ara.net.au](mailto:ara@ara.net.au).

**Please note:** some ARA committees have governance arrangements that restrict membership to certain organisations.





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