

# ANNUAL REPORT

GRATTAN  
Institute

2019-2020



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## OUR IMPACT

Grattan Institute produces high-quality public policy recommendations for Australia's future. In 2020, our independent research has shaped the Australian policy conversation from childcare to COVID-19.

# *We are* **INDEPENDENT**

Grattan is independent, taking the perspective of the Australian public interest rather than any interest group, and it forgoes commissioned work to preserve this independence.

# **RIGOROUS**

Grattan is rigorous in obtaining the best available evidence, analysing and synthesising the data, and building on published work.

# **PRACTICAL**

Grattan is practical in articulating what governments should do to improve the lives of all Australians.

## OUR INFLUENCE

**17**  
*reports*

**83**  
*official citations*

**142**  
*opinion pieces*

**44K+**  
*report downloads*

**46K+**  
*media mentions*

**195**  
*speeches*

## NOTE FROM OUR CHAIR

In an ever-changing economic and political environment, an independent, rigorous, and practical think tank is vital. Since its inception 11 years ago, Grattan has shown that sound analysis of public policy issues can, and does, make a difference. Key decision makers increasingly seek out Grattan's sophisticated data analysis and policy recommendations to navigate complex policy questions.

Grattan's impact is due in part to its impressive outreach. Its work is cited almost twice a week in ministerial and shadow minister speeches, and official publications such as government and parliamentary reports. Its work is mentioned almost daily in the media. Increasing engagement on social media enables more Australians to join in the conversation. Today, those who engage in Australian public policy say that it would be hard to imagine Australian public life without Grattan.

As this report shows, all of Grattan's programs have had a substantial impact on Australian public policy. The Health Program's work has led to both public and private hospital systems reducing the cost of operations, lower prices for pharmaceutical benefits, and more focus on palliative care. The Energy Program continues to pressure governments to find a sustainable solution for reducing emissions and lowering energy costs for consumers. The School Education Program

was instrumental in getting government and independent schools to provide more useful and regular feedback on teaching quality and student learning. The Budget Policy & Institutional Reform Program has defined substantial agendas for tax reform and more transparent institutions. Transport & Cities has led discussions about encouraging more evidence-driven decisions on infrastructure spending and dealing with traffic congestion in our major cities. Household Finances continues to suggest ways to make housing more affordable and to deliver adequate retirement incomes at lower cost.

It is impressive that a small institution of fewer than 30 people continues to make such a meaningful difference to public debate, the considerations of decision makers, and outcomes on important policy issues. Grattan's continuing success, however, depends on its long-term financial independence, which ensures its editorial freedom. Grattan needs financial support so it can become a permanent institution in Australian public policy. I take the opportunity to thank all Grattan's donors and supporters, whom we acknowledge within this report, for their ongoing support. Your contributions ensure that Grattan continues to produce independent, rigorous, and practical work to benefit future generations.

**The Hon Alex Chernov AC QC Chair**

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## CEO REPORT



**DANIELLE WOOD**  
CEO

In 2019-20, Grattan Institute continued to shape Australian domestic policy. Its landmark series of reports on private health insurance and care, and congestion charging in Sydney and Melbourne, were widely discussed. Grattan's work has made it a leading player in the debate on the Superannuation Guarantee. Grattan's proposal for a green steel industry made its way into Commonwealth energy and industry policy.

The year was overshadowed by the COVID-19 pandemic. We realised quickly that there

was no more pressing policy issue, and many of our staff shifted to advancing the debate on the health and economic response.

Grattan was the third-most widely cited institution – after the Peter Doherty Institute and the CSIRO – in the media on the issue. John Daley's timely 'Endgame C' essay on the public health response was read by almost 1 million people. Grattan published early reports estimating how the epidemic would affect employment, how students might catch up on lost learning, and how the health system should respond. We made the case for a large-scale economic response to help businesses and households stay afloat through the lockdowns. We brought this work together in *The Recovery Book*, which outlined a comprehensive agenda for governments to respond to the crisis.

Overall, Grattan published 17 reports and made 21 submissions to parliamentary and other public inquiries. These contributed to the public debate, reflected in more than 46,000 media mentions and 142 opinion pieces. Grattan staff talked directly to more than 1,000 decision makers, and made more than 250 speeches and presentations – increasingly by Zoom as the year went on. The impact was tangible, with Grattan's work cited 83 times in official forums such as ministerial and parliamentary speeches, and government and parliamentary reports.

Our team of Program Directors has an important research agenda underway. COVID-19 delayed but did not stop





Danielle Wood and John Daley in discussion at the end-of-year Summer Reading List for the Prime Minister event, held at State Library Victoria.

important work on social housing, female workforce participation, and prioritising policy reform. Indeed, these issues are even more important in the wake of COVID.

We are preparing new work on policy issues including aged care, the future role of gas in the energy system, and the systemic barriers to reform.

During the year, Grattan farewelled Andrew Norton, who founded and ran Grattan's higher education program for 7 years, and Grattan made the difficult decision not to continue the program without him. Peter Goss also departed after five years as Grattan's school education Program Director, making major contributions to policy on school funding and the teacher workforce.

2019-20 was the last of John Daley's 11½ years as Grattan's CEO. He built Grattan's systems from the day it opened the doors, nurtured its culture, personally authored many of its leading reports, and shaped all of its other work. He embodied Grattan's commitment to interacting with all sides of politics, producing rigorous work, and always focusing on the practical question of what government should do. I'm proud that the Board has asked me to build on John's legacy.

I'm delighted to be leading Grattan's passionate and dedicated staff, who in 2019-20 worked harder than ever to research and advocate for policies to make Australia a better country – all while managing the transition to remote work with their usual good humour. We all hold out hope for a more sedate 2020-21.

## BUDGET POLICY AND INSTITUTIONAL REFORM

*Danielle Wood, Program Director*



The Budget Policy and Institutional Reform Program published a report, *Generation gap: ensuring a fair go for younger Australians*, in August 2019. The report showed that older Australians today have substantially greater wealth, income, and expenditure than older Australians three decades ago, but living standards have improved far less for younger Australians.

And younger Australians will bear the brunt of future budget pressures. The ageing of the population means higher government spending on health, aged care, and pensions, but fewer working-age people for every person over 65 to pay for it. Governments have exacerbated these economic and demographic pressures by introducing generous tax concessions for older people.

The report recommended a suite of policy changes to ease the burden on younger Australians, including reforms to boost economic growth, improve housing affordability, and scale back age-based tax breaks. Some of these will be even more important in the wake of COVID-19, given the disproportionate impact of the COVID crisis on young people.

The Program published an essay in the 'Matters of Trust' special edition of the Griffith Review, in February 2020. The essay focused on the 'grey zone' of special-interest influence in politics, and how this can undermine trust in government as well as public policy outcomes and decision-making. The essay advocated for reforms to political donations and lobbying outlined in previous Grattan

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**‘...Grattan Institute work that was done, which outlined as a percentage of the economy, the scale of Australia's fiscal response to this crisis, which sits pretty much on top of the leaderboard around the world.’**

Prime Minister Scott Morrison,  
media conference, April 2020

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reports, Crisis of trust (March 2018) and Who's in the room? (September 2018).

More recently, the Program has been focused on the economic fallout from COVID-19 and the government response to the crisis.

The Program launched Grattan's Econ Tracker in April – a public dashboard illustrating the real-time impact of COVID-19 on Australian households and businesses. We also published work on the right economic response to the crisis, the size and scale of the fiscal response to COVID, supports to enable businesses to hibernate (particularly the need for commercial rent relief), the risks of the ‘fiscal cliff’ when government supports come to a sudden stop in October, and the need for an economic transition plan.

We were active behind the scenes talking to politicians and bureaucrats. Our proposal for a targeted extension of the JobKeeper scheme for businesses that have suffered extended turnover decline was very close to the plan announced by the Government in July. Our call for a greater sharing of the COVID revenue hit between tenants and landlords was reflected in the principles for the National Code of Conduct for commercial tenancies agreed by the National Cabinet.

The team has also been active in debates about support for the childcare sector during COVID – flagging the need for emergency supports to keep the sector viable and for lower out-of-pocket fees so that parents who have lost jobs or hours can continue to keep their child's place in care.

The Program's work has fed into public and political debate, particularly on the COVID economic response, with regular media engagements and public events, including two appearances by the Program Director on ABC TV's Q&A program.

*‘Every generation faces its own unique challenges, but letting this generation fall behind the others is surely a legacy none of us would be proud of.’*

Danielle Wood, *The Conversation*, August 2019



## ENERGY

*Tony Wood, Program Director*

The Energy Program focused on the extent to which Australia's energy transition to a low-emissions future is being hampered by inadequate policy and an unprecedented level of government intervention.

The Program's report, *Power play: how governments can better direct Australia's electricity market* (October 2019), was well-received and widely supported by consumer groups and industry participants. Their common concern is that direct government intervention in the energy market creates uncertainty and higher risks for efficient investment, and leads to higher prices. The report acknowledged that governments feel compelled to act when things go wrong, such as blackouts or big price increases. The central argument of the report is that how governments act really matters. Recommendations from the report, including a financial mechanism to reduce the risk and consequences of unplanned power plant closure, are under consideration.

Stable and credible climate-change policy at a national level remains politically elusive despite broad community responses after the bushfires of the 2019-20 summer and the increasing number of business groups calling for such policy and committing to net-zero emissions.

One of the barriers to broader political action on climate change is the threat to jobs in areas where large numbers of people are employed



in sectors that will decline in a low-emissions world. The Program's report, *Start with steel: a practical plan to support carbon workers and cut emissions* (May 2020), identified steel manufacturing based on renewable hydrogen as a big opportunity for Australia.

Renewable hydrogen could replace metallurgical coal in the process of turning iron ore into iron and then into steel. While

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**'Excellent work and excellent coverage, important and timely. I've been in multiple conversations this week where I've promoted it and twice heard it described as setting a new benchmark for others in our sector to follow.'**

Anna Skarbek,  
CEO ClimateWorks Australia, May 2020

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Energy Program Director Tony Wood (second from left), in discussion with (from left) Professor Paul Webley, Dr Alan Finkel AO, and Professor Sandra Kentish, at Energy Futures: Hydrogen, worth the hype? an event in partnership with the Melbourne Energy Institute.

*'A well-designed and well-regulated electricity market will deliver low emissions and reliable supply at lowest cost. Direct, ad-hoc government intervention will lead to higher prices and lower reliability. If government actions are rules-based and implemented through sound institutions, all Australians will share the benefits.'*

Tony Wood, *The Australian Financial Review*, October 2020

this is more expensive than traditional coal-based steel making, in a decarbonising world Australia would be likely to have a strong competitive advantage from its low-cost, large-scale renewable energy – potentially supporting a new export sector of comparable scale to our coal exports today. This report received wide coverage and led to our Program presenting the work at many online seminars.

Australia's commitment to the Paris Agreement effectively means cutting carbon emissions to near zero over the next 30 years. This must be done at the lowest cost, while ensuring energy supplies remain reliable. In September 2019 the Program published a policy paper, *Australia's energy transition: a blueprint for success*. The paper emerged from a gathering of senior industry stakeholders, convened by the Program, which identified several key structural issues that need to

change for the objective to be achieved. In addition to integrated energy and climate policy, the paper called for a revitalisation of the governance arrangements that determine the effectiveness of the energy markets.

The Program contributed to *The Recovery Book* (June 2020) in the context of an economic stimulus in a post-pandemic recovery. The recommendations questioned the economic and environmental benefits of a gas-led recovery phase and supported initiatives consistent with a low-emissions future.

The Program's previous work continues to have significant impact on current policy debates, including on network over-investment, inappropriate bidding behaviour in the wholesale market, technology support, and the real drivers of power outages.

## HEALTH

### *Stephen Duckett, Program Director*

The Health Program continued its focus on out-of-pocket payments, specifically in-hospital out-of-pocket payments. The Program produced two reports and one working paper on this topic, which together provide comprehensive coverage of the problems and opportunities with private health care.

The working paper, *The history and purposes of private health insurance* (July 2019), set out a comprehensive framework against which to judge Australia's private health insurance arrangements. The two reports addressed different aspects of private health. The first report, *Saving private health 1: reining in hospital costs and specialist bills* (November 2019), addressed supply-side issues, concentrating on how to reduce costs of private health care as a path to reducing private health insurance premiums. The second report, *Saving private health 2: making private health insurance viable* (December 2019), addressed the demand side, including the inherent instability of private health insurance, underwritten as it is by a complex array of regulation and direct and indirect subsidies. This stream of work introduced the concept of a 'death spiral', associated with the youth exodus from private health insurance. The concept of the death spiral is now part of the policy discourse about private health insurance.

The bushfires in the summer of 2019-20 cause a change in priorities for the Program and it

commenced work on what was to become a new theme on 'health emergencies'. The first report was to be on the health and healthcare consequences of bushfires and other climate-related disasters. This was put aside when the coronavirus pandemic hit and the Program pivoted its work to analysis and recommendations about public health and health system responses. The Program produced innumerable opinion pieces and blog posts in response to requests for comment, to educate the public, and to influence decision makers.

The Program also produced a report on COVID-19, *Coming out of COVID-19 lockdown: the next steps for Australian health care* (June

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## **'At last a real discussion about the future of private health insurance.'**

*Andrew Podger,  
former secretary of the  
Commonwealth Department  
of Health, August 2019*

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2020). This report involved development of a micro-simulation model of the Australian population, and inputs into the model on the epidemiological characteristics of the disease. This then allowed testing of various options for lifting restrictions, and the potential impact of new cases if restrictions were lifted.



The model was provided to state and federal government departments in advance of the report release.

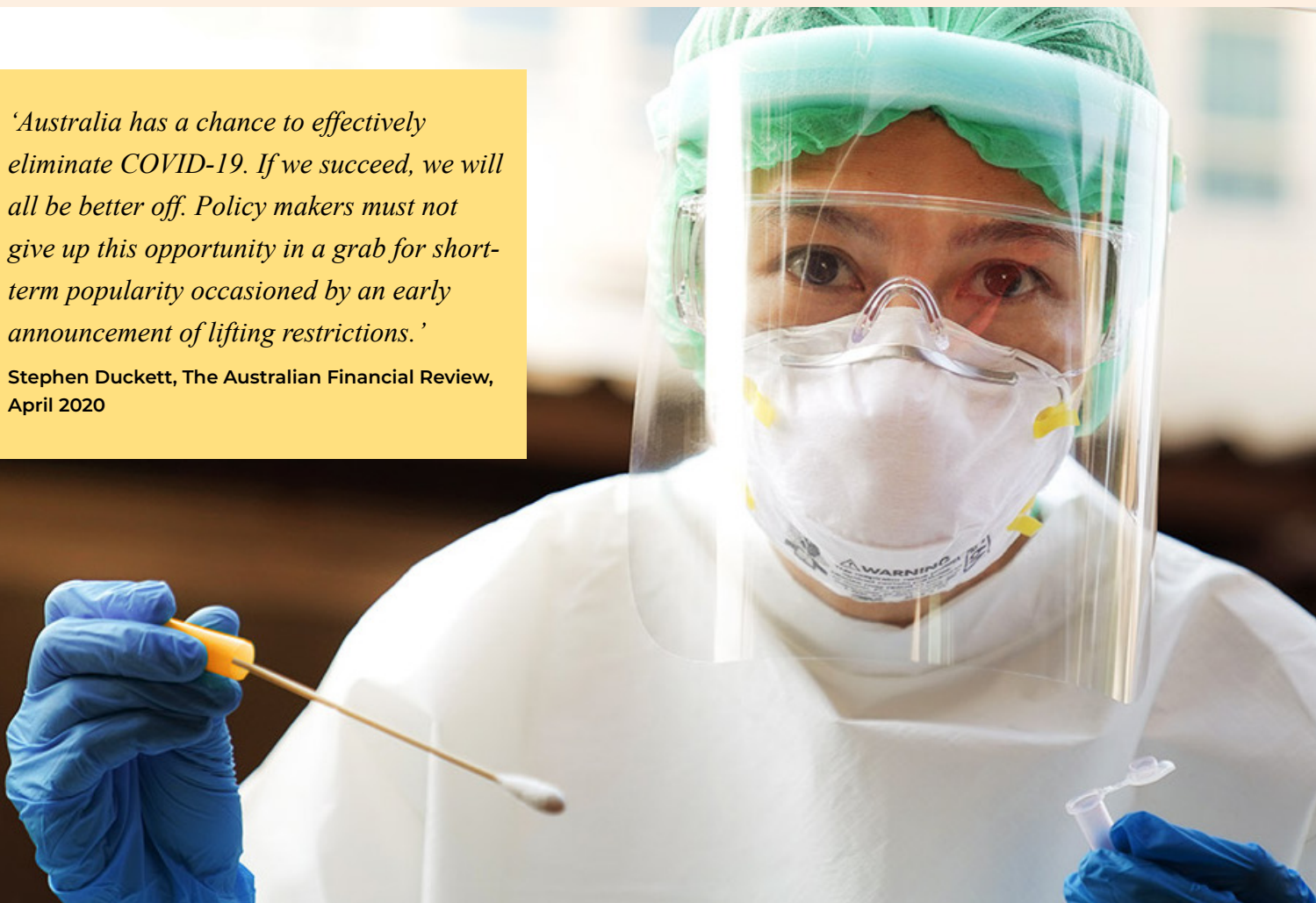
The report identified four key successes in Australia's response: cooperative governance informed by experts (most notably seen in the establishment of the National Cabinet); closure of international borders and mandatory quarantine; rapid adoption and acceptance of social distancing measures; and expansion of telehealth. The health system mostly adapted well to the pandemic challenge. Governments quickly expanded intensive care unit capacity, redeploying staff and equipment to this new higher priority. Doctors and clinics pivoted quickly to telehealth.

But our report identified four key failures: the handling of the Ruby Princess cruise ship was scandalous; borders weren't closed quickly enough; some aspects of the health system response were too slow; and there were mixed messages about what was expected of the population.

The report identified lessons from the health system response which should be incorporated into a new normal: expand telehealth to give more people quicker access to care; reform primary care to provide better care for people with chronic conditions; improve health system readiness by better planning and coordination; and strengthen supply chains to ensure adequate supplies of personal protective equipment and ventilators.

*'Australia has a chance to effectively eliminate COVID-19. If we succeed, we will all be better off. Policy makers must not give up this opportunity in a grab for short-term popularity occasioned by an early announcement of lifting restrictions.'*

Stephen Duckett, The Australian Financial Review, April 2020





## HOUSEHOLD FINANCES

***Brendan Coates, Program Director***

Retirement income was a major focus of the first year of the Household Finances Program, which established itself as a driving force in public debate about superannuation.

In February 2020, the Program released a working paper, *No free lunch: higher super means lower wages*, which showed that about 80 per cent of the cost of higher compulsory super contributions has been borne by workers in the form of lower wages growth. This finding was almost immediately echoed by Reserve Bank officials in testimony to Parliament and has been widely cited in the media and by a number of federal MPs. At the same time the Program demonstrated that most Australians had little savings to tide them over, underscoring the need for substantial support from governments.

In March 2020, the Program published another working paper, *Balancing act: managing the trade-offs in retirement incomes policy*, which updated Grattan's past work on retirement incomes. It showed that the retirement incomes system is working well for most Australians: most retirees today feel comfortable financially, and are less

*'Employers might hand over the cheque for super, but workers ultimately pay for almost all of it through lower wages. That's the finding of our latest research paper for Grattan Institute, No free lunch: higher super means lower wages.'*

**Brendan Coates, The Sydney Morning Herald, February 2020**



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**‘Few organisations could claim to have had more influence over contemporary debate about super policy than the Grattan Institute.’**

Journalist Joanna Mather,  
The Australian Financial  
Review, September 2019

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financially stressed than younger Australians who are working. And on reasonable assumptions most workers in future can expect to be at least as well off in retirement as they are while working. The paper recommended that the scheduled increases in compulsory super should be abandoned, that superannuation taxes should be further reformed, and that retirees who rent should get further government assistance.

The Program adapted quickly to the coronavirus crisis, publishing a working paper in April 2020 on the labour market impacts of COVID-19 shutdowns. Shutdown: estimating the COVID-19 employment shock, published before any post-shutdown labour force data had been released by the ABS, estimated that the number of hours worked in Australia would decline by between 13 and 25 per cent.



Soon after, Reserve Bank officials stated that they expected hours worked to decline by 20 per cent.

In The Recovery Book (June 2020), the Program developed the case for substantial additional fiscal stimulus, along with further easing of monetary policy. It quantified the amount of stimulus that would be required to avoid the long-lasting impacts of a slow economic recovery, especially on younger Australians. It also set out the case for a permanent increase of at least \$100 a week in the base rate of the JobSeeker Payment.

The Program advocated for reforms to make housing more affordable and to reduce homelessness, as well as pushing the states to swap stamp duty for a broad-based property tax, in submissions to Commonwealth and state parliamentary inquiries and independent reviews.



## SCHOOL EDUCATION

*Julie Sonnemann, Acting Program Director*

*Peter Goss, Former Program Director*

The School Education Program published a report, *Attracting high achievers to teaching*, in August 2019. The report highlighted the long-term decline in academic calibre of the young people who choose to become teachers. It reframed the debate by collecting new data on what would entice young high achievers to teaching. It found that scholarships, top-end salaries of \$180,000, and more challenging career paths were needed. The report recommended a reform package that would double the number of high achievers taking teaching within a decade. The cost of the package is affordable – about one-third of the extra funding government schools would receive under full ‘Gonski funding’.

*‘As new evidence on what works emerges, top teachers should help spread it in schools. Teaching has been much slower than other professions such as medicine and engineering to produce scientific evidence and incorporate it into practice.’*

Top Teachers report, February 2020

The report was well received by senior government officials, and the Victorian Education Minister James Merlino immediately supported our proposal to pay the best teachers much more. The report received support from deans of education faculties, principal associations, and the Australian Education Union (AEU). A former AEU President described the report as ‘hands-down the best proposal for improving the teaching workforce in my 40-year career’.

The Program then tackled career path reform in its next report, *Top teachers: sharing expertise to improve teaching*, published in February 2020. The report called for an expert teacher career track, with two new roles for Australia’s top teachers in maths, science, and English, giving them dedicated ‘day jobs’ to improve teaching across schools. The new roles would help to spread evidence-teaching practices and professionalise teaching. The report showed that current roles for top teachers aren’t working, and provided a detailed blueprint for how to implement the model.

In response to COVID, the Program quickly produced a report, *COVID catch-up: helping*



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**‘Grattan’s report, Attracting high achievers, is one of the most important think-tank reports to be released this year.’**

Federal Labor MP Andrew Leigh, September 2019

**‘The Grattan Institute released a [COVID catch-up] report that shows small group tutoring can provide an additional five months of learning in 20 weeks. That is what this [new \$250 million package] will do...’**

Victorian Education Minister, James Merlino, October 2020

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disadvantaged students close the equity gap (June 2020), with support from the Origin Foundation. The report provided rigorous estimates of the likely learning losses from remote schooling for disadvantaged students, as well as a rapid review of evidence-based solutions to help them catch-up. It recommended big investments in small-group tutoring and literacy and numeracy programs. Our recommendation was adopted in both Victoria and NSW, with major investments in tuition in small-groups for struggling students (\$250 million in Victoria and \$337 million in NSW). The new tuition programs will not only help schools, but also provide employment and income to people hit hard by COVID-19 job losses, helping to stimulate the economy at the same time.

Previous work continues to have significant impact. The MySchool website was updated for 2020, with an increased emphasis on student learning progress, as opposed to student achievement. The Program has argued for this shift for many years.





Ashleigh Cormack (Uber), Lauren Walker (Veitch Lister Consulting), Marion Terrill, and Grattan Editor Paul Austin at a Tackling Melbourne's Congestion event, State Library Victoria

## TRANSPORT AND CITIES

*Marion Terrill, Program Director*

The Transport and Cities Program published two reports in October 2019 on congestion charging. Why it's time for congestion charging: better ways to manage busy urban roads argued that the conditions had never been more favourable, given the large pipeline of public transport infrastructure under construction, the maturing of number plate recognition technology to give effect to a congestion charge, and the growing body of overseas experience to guide Australian state governments.

A week later, the Program published Right time, right place, right price: a practical plan for congestion charging in Sydney and Melbourne. This report was designed to bridge the gap between the theory of congestion charging, loved by economists, and a plan for how it could feasibly be done.

It recommended a \$5 charge to enter the Sydney or Melbourne CBD in the morning peak, and a \$5 charge to leave in the afternoon peak. This scheme would benefit the community, according to our high-level cost benefit analysis. Typical fears – that congestion charging would prevent lower-income people from getting where they need to go – were overblown. The report also proposed a way to manage the interface with existing toll roads, the privacy protections needed, a fair enforcement regime, and how to spend the revenue that would remain after paying for the set-up and operation of the scheme.

Even though the transport ministers and premiers of NSW and Victoria responded by immediately ruling out congestion charging for their capital cities, the debate continued



**#  
'Give us a TRAIN please.  
Send for the guards and take  
the Grattan Institute to THE  
PRISON TOWER.'**

Journalist Samantha Maiden  
on Twitter

**'The Grattan Institute STOMPS  
all over my great passion –  
high-speed rail – and I'm in  
despair.'**

Journalist Virginia Trioli on Twitter

**'Could not have been more  
keen for a bullet train before  
this report. Not keen now.  
Great report.'**

Andrew Lilley, random Twitter user

to run hard, prompting editorials in *The Age* and the *Herald Sun*.

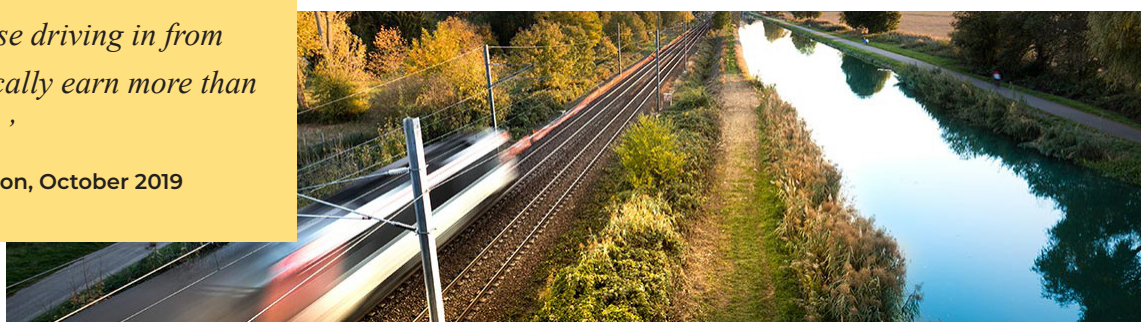
A trial of a CBD cordon scheme for Sydney has since been recommended by the NSW Review of Federal Financial Relations. This new recommendation underscores that the case for a congestion charge has become all the stronger in light of COVID-19. As the Program has argued, public transport is not particularly compatible with social distancing; while cycling, walking, and working from home may grow in importance if social distancing is sustained, doing nothing about road congestion is a disaster in the making.

The Program's third report of the year, *Fast train fever: why renovated rail might work but bullet trains won't* (May 2020), countered the conventional wisdom that high-speed rail would help Australia achieve net zero emissions by 2050, and made the case that Australia's population is just too small and spread out for high-speed rail to be feasible. The report also argued against the notion that faster regional trains would necessarily be an effective part of a decentralisation agenda, based on analysis of commuter patterns.

Even though the federal Opposition Leader, Anthony Albanese, and the Shadow Minister for Infrastructure, Catherine King, renewed calls for a bullet train as recently as April and May of 2020, the policy is no longer on the ALP website.

*'Perhaps surprisingly, drivers to the Sydney CBD are more likely to come from inner, richer parts of the city – think Mosman and Double Bay, not Penrith or Parramatta. It's the same in Melbourne: more people drive from Kew and Richmond than Broadmeadows or Dandenong. Even those driving in from lower-income areas typically earn more than most of their neighbours.'*

Marion Terrill, *The Conversation*, October 2019



## FINANCIAL STATEMENT

	2019 \$'000	2020 \$'000
<b>Endowment Income</b>		
Interests and Dividends	1,748	1,325
Realised Gains (Losses) from the Sale of Investments	-472	138
Movement in the Market Value of Investments	1,074	-1,624
Less: Investment Management Fees	-143	-152
Total Interest and Investment Income	2,207	-313
<b>Additions to the Endowment</b>		
Other Donations	763	728
Total Additions to the Endowment	763	728
Total Endowment Income	2,970	415
<b>Operating Result</b>		
Operating Revenue	886	714
Operating Expenditure	5,539	5,538
Operating Surplus (Deficit)	-4,653	-4,824
Total Entity Surplus (Deficit)	-1,683	-4,409
Equity	35,796	31,387

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