# MINERALS COUNCIL OF AUSTRALIA

## INQUIRY INTO THE FACTORS SHAPING SOCIAL LICENCE AND ECONOMIC DEVELOPMENT OUTCOMES IN CRITICAL MINERALS PROJECTS ACROSS AUSTRALIA

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11 MARCH 2026

## TABLE OF CONTENTS

# 1. INTRODUCTION

The Minerals Council of Australia (MCA) represents the nation's mining industry, whose long-life operations have shaped the economic and social foundations of regional and remote Australia for generations. MCA member companies operate large-scale, capital-intensive projects across some of the most isolated parts of the country and have deep experience integrating workforce planning, community expectations, infrastructure coordination and regulatory requirements. This long-term commitment is the reason many regional towns have population stability, viable services and functioning local economies.

Critical minerals projects in remote Australia create and sustain region-building economic infrastructure. Across their full lifecycle they strengthen regional economies, providing the stability that remote communities rely on.

These projects are not short-term developments; they are catalysts for population retention, business growth, skills development and long-term regional capability.

In towns with a fine line between viability and decline, critical minerals development can be a stabilising force.

Remote communities operate on narrow margins: small population bases, limited housing, stretched health and education services and high infrastructure costs.

When economic activity weakens, the consequences are immediate: families leave, school enrolments fall, health services face staffing challenges, and local businesses experience sudden drops in demand.

Conversely, when long-life industries are present and stable, communities grow, services remain viable and local businesses invest with confidence.

Long-life mining is the stable foundation that makes every other development pathway possible. Remote communities need this stability to diversify from a standing start.

The population base, wages, infrastructure, transport links, housing demand, workforce capability and local government capacity that underpin tourism, agriculture, advanced manufacturing, renewable energy and services exist only when the economic floor is strong enough to carry them. Mining provides that floor.

Without it, there is no workforce to retrain, no businesses to scale, no institutional capacity to plan and no viable platform for new industries to grow.

The mining industry has delivered that stability for decades. Long-term operations in gold, iron ore, coal, bauxite and base metals have anchored population levels, created multi-generational employment, supported schools, clinics and emergency services, sustained local governments and enabled the growth of local and Aboriginal and Torres Strait Islander enterprises.

Mining has been a cornerstone industry for the development of regional Australia, supporting predictable workforce pathways, structured local procurement, coordinated infrastructure planning and whole-of-lifecycle management.

Critical minerals development extends this proven model. The core expectations of regional communities for strong employment, local business participation, meaningful inclusion of Aboriginal and Torres Strait Islander people, effective infrastructure development and regulatory clarity are already being met in Australia's mining regions.

Critical minerals projects influence these conditions at every stage of development:

- Early investment sets expectations for councils, Traditional Owners and service providers where construction requires coordination to avoid pressure on housing and services
- Operations deliver the decades-long employment and contracting activity that underpin population stability
- Care and maintenance phases test whether commitments endure through downturns
- Effective planning for closure and transition determine whether regional capability persists beyond the life of a project
- Communities benefit most when every stage is underpinned by stable, predictable and coordinated policy settings.

Australia's competitiveness in critical minerals will depend on replicating this successful model.

Improving regulatory clarity, aligning infrastructure and land-use planning, strengthening regional skills pathways and ensuring cross-jurisdictional consistency will enable critical minerals projects to build on the settings that have delivered strong regional outcomes for decades.

When mining is well governed, regionally integrated and planned across its full lifecycle, it strengthens the communities around it.

In extending a long-standing, successful regional development model powered by mining, critical minerals development can follow a proven pattern for the abiding benefit of all Australians, especially those living in regional communities.

If the House Standing Committee on Primary Industries has any questions, Matthew Denyer, Principal Adviser – Indigenous Partnerships and Communities can be contacted on [redacted] or [redacted]

Yours sincerely

[redacted]

**TANIA CONSTABLE PSM**
**CHIEF EXECUTIVE OFFICER**

## 2. RECOMMENDATIONS

Australia's critical minerals opportunity will only translate into regional economic strength if projects can move from approval to construction and into long-term operation. That requires policy settings that enable investment to proceed at scale, support skilled workforce development, maintain local and Aboriginal and Torres Strait Islander business participation, and ensure that long-life projects can anchor the population levels, services and infrastructure that communities rely upon.

Across established mining regions, the pattern is clear: when projects progress in a predictable, coordinated policy environment, they create jobs, support local services, expand business capability and underpin long-term community confidence.

When investment stalls, regional communities feel the consequences first through deferred employment, weakened service viability and reduced economic activity.

The recommendations that follow focus on ensuring Australia can convert its critical minerals potential into real regional outcomes: strong labour markets, resilient services, competitive investment conditions and long-term economic participation for communities and Traditional Owners.

They are practical, shovel-ready measures drawn from decades of experience across the mining industry.

*Recommendation 1*

In line with government proposals, strengthen planning, environmental and project approval systems so critical minerals and major minerals projects can progress from approval into construction within commercially realistic timeframes that maintain regional employment, business confidence and service viability.

*Recommendation 2*

Reform the *Native Title Act 1993 (Cth)* future acts framework so minerals investment can proceed at scale through proportionate, fit-for-purpose agreement pathways – including short-form agreements for exploration and comprehensive agreements for development and operations – that support long-term economic participation for Traditional Owners.

*Recommendation 3*

Align national and state workforce, training and migration settings with the timing and sequencing of critical minerals development so regional labour markets can supply the skilled workers required for construction, operations and long-term career pathways.

*Recommendation 4*

Expand targeted capability programs that enable local and Aboriginal and Torres Strait Islander businesses to participate in long-life project demand by supporting governance maturity, commercial readiness, workforce development and sustained multi-year contracting opportunities.

*Recommendation 5*

Coordinate federal, state and local infrastructure planning around projected critical minerals development so regional housing, power, water, transport, digital connectivity and community services can keep pace with investment and maintain long-term service viability. This should also seek to leverage industry investment to identify and support opportunities for regional economic diversification that supports long-term community and regional resilience.

*Recommendation 6*

Ensure durable cross-jurisdictional policy alignment on planning, land access, workforce development and regional service delivery so communities and investors receive consistent, predictable operating conditions that support timely project delivery and regional economic confidence.

## 3. REGIONAL COMMUNITY STRENGTH

*Why remote communities depend on long-life industry*

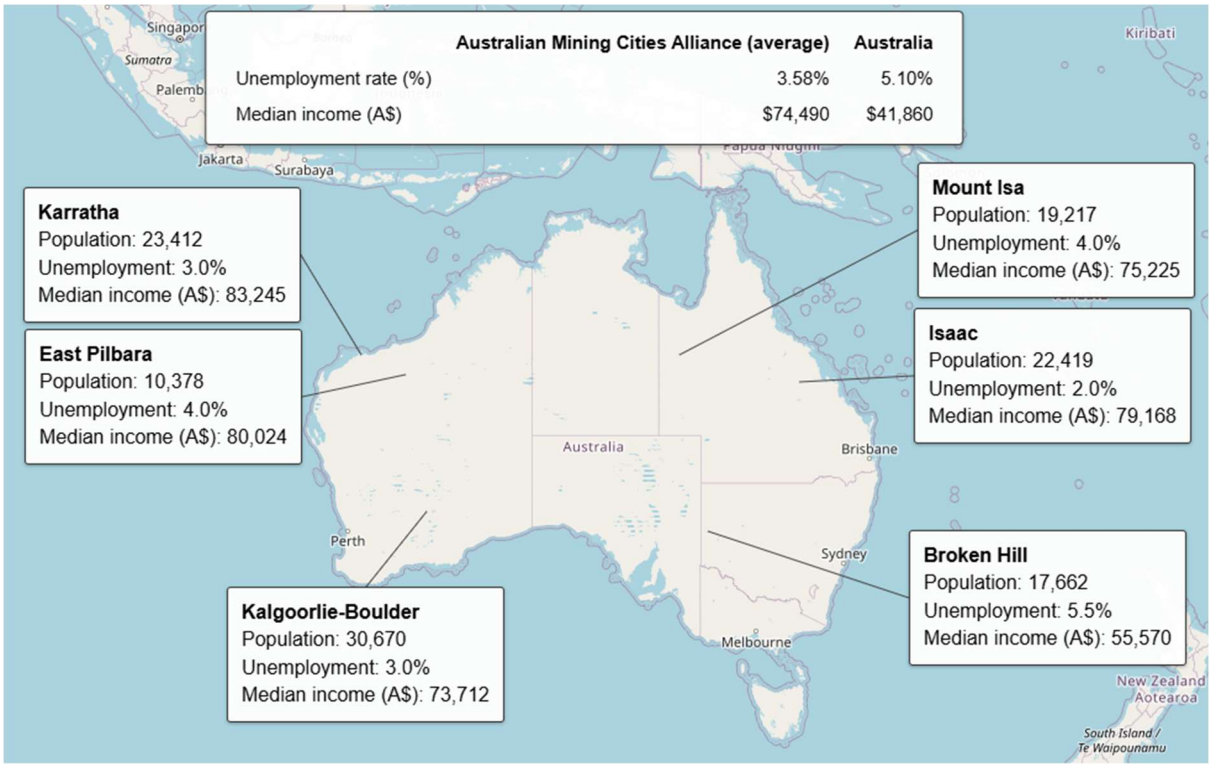
Remote and regional Australia relies on long-life economic activity to remain viable. Population bases are small, services operate on narrow margins and essential infrastructure such as power, water, housing, transport, aviation, health and education can be costly to provide and maintain.

When economic activity contracts, the effects are immediate: families leave, school enrolments fall, clinics face staffing pressure, childcare services close and local governments struggle to sustain community facilities and service delivery. Long-term stability keeps communities functioning.

For more than fifty years, the mining industry has provided this stability across Western Australia, Queensland, New South Wales and the Northern Territory. Long-life operations allow towns to reach and maintain the population thresholds that support schooling, health care, local government capability and viable business activity.

Remote communities depend on the consistent, long-term economic foundations delivered by and supported by mining as the central driver to the long-term development of many regions across Australia which may otherwise have declined or even disappeared.

**Figure 1: Regional economic profile for the Australian Mining Cities Alliance regions**




Source: ABS, *Data by region 2011-2025*, by Local Government Areas (ASGS Edition 3, 2021-2026), available at *.Stat Data Explorer (BETA) • Data by region 2011-2025, by Local Government Areas (ASGS Edition 3 (2021 – 2026))*

Where long-life mining is integrated into regional planning, communities retain families, maintain workforce demand and keep essential services viable. Stable operational activity also allows councils, schools, clinics and emergency services to recruit and plan with confidence.

**Case Study 1 – City of Karratha, Western Australia**

Karratha shows how long-life mining activity sustains essential services in a remote setting. With a population[1] of roughly 23,412 people, the city maintains government and independent schools, catering to approximately 3,700 students. This level of educational infrastructure is only viable because families can rely on stable employment and remain in the region across multiple project cycles.

In 2024-25 Karratha Airport recorded approximately 650,000[2] passenger movements that support regular passenger transport services and charter flights daily. These regular services enable medical travel, business connectivity and workforce mobility, and are maintained by the steady demand generated by long-term mining and energy operations. Without a stable population and workforce, the scale and frequency of these services would not be commercially viable in such a remote location.

**Case Study 2 – Moranbah Airport, Queensland**

Moranbah Airport[3] is a clear example of how long-life mining investment creates essential community infrastructure that would not otherwise exist in a remote inland town. Built, funded and maintained by BHP-Mitsubishi Alliance (BMA), the airport facilitates regular passenger transport and charter flights under Queensland's regulated air service framework, giving the residents of the Isaac region direct air access to Brisbane, Cairns and Townsville. The residential mining workforce is the anchor for demand ensuring commercial viability for airlines to continue operating and expanding.

The airport also provides critical aviation capability for emergency medical response. Prioritised airport access to support BMA CQ Rescue, Royal Flying Doctor Service and LifeFlight Australia has enabled over 1,700 urgent retrievals, stabilisation and rapid transfer of patients from the Isaac regional community to major hospitals since 2020. Maintaining this level of aviation infrastructure – certified runway, lighting, security, navigation equipment and terminal operations – is only feasible because long-life mining provides the population base, workforce continuity and operational utilisation that keep the airport viable.

Moranbah Airport shows how mining underwrites the connectivity, safety and mobility that remote communities depend on every day — infrastructure that would simply not exist at this scale without sustained industrial activity.

*Critical minerals: continuity, not disruption*

Critical minerals projects are emerging in regions that already understand how to work with long-life industry. These developments represent the next stage of a regional development model refined over decades and built on long-term operations, integrated planning, predictable workforces and established relationships between councils, Traditional Owners, communities and industry.

[1] Australian Bureau of Statistics, *2021 Census QuickStats: Karratha (LGA 54310)*, Commonwealth of Australia, Canberra, 2022 viewed 3 February 2026
[2] Bureau of Infrastructure and Transport Research Economics, *Airport Traffic Data 1985-86 to 2024-25*, Commonwealth of Australia, Canberra, 2025 viewed 3 February 2026
[3] House Standing Committee on Industry, Innovation, Science and Resources, *Inquiry into how the mining industry can support businesses in regional economies – Isaac Regional Council (submission 31)*, Parliament of Australia, Canberra, 2018

Across Queensland, New South Wales, the Northern Territory and Victoria, emerging critical minerals provinces sit within communities being shaped by multiple mining cycles. The Far North and North West Minerals Province corridors in Queensland, the Cobar–Broken Hill and Lachlan Fold Belt regions in New South Wales, the Barkly and McArthur Basin regions in the Northern Territory, and new exploration precincts in Gippsland and the Central Highlands of Victoria all operate within existing industrial systems and governance arrangements.

**Case Study 3 – Gippsland, Victoria**

In the Gippsland region of Victoria, emerging critical minerals activity is building on an existing industrial and labour foundation shaped by decades of energy and resource production with the Victorian government estimating an additional 13,400[4] new workers will be required in the 10 years to 2035 to support the Gippsland economy.

Gippsland Critical Minerals' Fingerboards Project[5] anticipates approximately 300 direct jobs over the 22-year mine life with genuine local job creation and no fly-in-fly-out employment being offered. The project continues to work closely with local Traditional Owners to incorporate Aboriginal and Torres Strait Islander cultural knowledge into the project environmental strategies.

Across regional Victoria and in all industries labour market projections[6] indicate that the workforce will require approximately 85,000 new workers and more than double that to account for those who leave the workforce permanently. This is why early-stage critical minerals activity like the Fingerboards Project is being integrated with local communities who understand the requirements and benefits of long-life industries, supporting regional workforce planning and service continuity.

These regions have the advantage of institutional knowledge, established infrastructure, stable workforces and councils that plan around the known cycles of mining. Critical minerals development extends a proven system that has delivered population stability, service viability and economic strength over generations.

Critical minerals projects are also establishing new processing and value-adding capabilities within regional Australia. In Western Australia's Goldfields, rare earths development is extending the long-standing mining model beyond extraction to include downstream processing and participation in global manufacturing supply chains.

These developments demonstrate how critical minerals projects can anchor regional economies while strengthening Australia's strategic position in emerging technologies.

**Case Study 4 – Lynas Rare Earths, Western Australia**

Western Australia's Goldfields hosts one of the world's most significant rare earths production systems. Lynas Rare Earths operates the Mt Weld mine near Laverton and the Kalgoorlie Rare Earths Processing Facility, linking long-life mining activity with downstream processing capability in the regional economy. The Mt Weld[7] operation has produced rare earth concentrate since 2011 and a 2024 resource update supports a projected mine life of more than 35 years at current production rates.

[4] Victorian Skills Authority, *Victorian skills plan for 2025 into 2026: Shared prosperity through skills*, State of Victoria, Melbourne, 2026
[5] Gippsland Critical Minerals Pty Ltd, *Fingerboards Mineral Sands Project – Community Engagement Plan*, Fernbank, 2026 viewed 5 February 2026
[6] Victorian Skills Authority, *Victorian skills plan for 2025 into 2026: Shared prosperity through skills*, State of Victoria, Melbourne, 2026
[7] Australian Stock Exchange, *2024 Mineral Resource and Reserve Update: Lynas Rare Earths*, Lynas Rare Earths, Sydney, 5 August 2024 viewed 5 March 2026

In 2024, Lynas commissioned the $800 million Kalgoorlie Rare Earths Processing Facility – Australia's first downstream rare earths processing plant – alongside a $500 million expansion of the Mt Weld operation. Together these investments have created an integrated rare earths production and processing system within the Goldfields region.

The operation supports regional businesses and Aboriginal and Torres Strait Islander enterprises across Western Australia. In 2024-25, approximately 73 per cent of inputs to Lynas' Australian operations were sourced within Western Australia and more than $40 million was spent with Aboriginal and Torres Strait Islander-owned businesses in the state.

Lynas also maintains a residential workforce presence in Kalgoorlie and supports local education, training and community programs, including partnerships with Curtin University, Central Regional TAFE and local schools to develop future technical and professional pathways in the rare earths sector.

*What strong communities look like in practice*

Community strength in remote Australia is best understood through practical, measurable outcomes that reflect actual experience. Long-standing mining regions provide a clear framework for assessing how critical minerals projects contribute to regional development.

**Case Study 5 – Newman Community Centre, BHP**

Newman's Community Centre[8] is the beating heart of a town that sits hundreds of kilometres from the nearest major city. When a woman or family in the Pilbara faces crisis, isolation magnifies the existing escalation factors of limited services, fewer safe spaces, and higher risk.

Western Australian Iron Ore's (WAIO) long-standing partnership didn't just create a program; it strengthened the social fabric of the entire community. Strong social connections, early childhood programs, new-parent support and affordable childcare are essential services which make the difference between a family staying or leaving – between feeling supported or becoming increasingly isolated.

These services determine whether families can remain connected, protected and able to participate in local life.

Population stability is the first indicator of community strength. Long-life operations provide the employment base that allows families to stay, enabling schools, clinics, childcare providers and councils to operate at sustainable scale. In remote communities, essential services such as childcare are often the determining factor in whether families remain in a town or relocate elsewhere.

**Case Study 6 – Thriving Futures Early Childhood Initiative, Western Australia**

Access to childcare is a critical factor in workforce participation and family stability in remote mining regions. In Western Australia's Pilbara, BHP's Thriving Futures initiative works with local providers and community partners to strengthen early childhood education services across regional towns.

Since launching in 2020, the program has supported the expansion of childcare services in communities including Newman. By June 2025, the initiative had eliminated the up to two-year childcare waitlist in Newman after previously reducing it by more than 75 per cent. The program

[8] BHP, *Community Development Report 2025*, BHP Group Limited, Melbourne, 2025 viewed 23 February 2026

has also created 67 jobs, awarded 39 scholarships for early childhood educators and delivered almost 400 hours of professional development to support workforce capability in the sector.

BHP has invested more than $7 million in the Thriving Futures initiative, working with local partners to strengthen early learning services and support families in regional communities. The program received the Western Australian Government's Community Partnership Award[9] at the Resources Sector Awards for Excellence in recognition of its contribution to regional community development.

Reliable access to childcare enables parents to participate in the workforce and supports families choosing to live and work in remote communities, reinforcing the population stability that long-life mining operations help sustain.

Employment and participation form the second indicator, and mining remains one of the largest private employers in regional Australia and provides a high proportion of skilled, long-term roles.

Apprenticeships, traineeships and technical pathways retain young people in regional towns and support multi-generational workforce capability. Long-standing operations also employ significant numbers of Aboriginal and Torres Strait Islander people, providing income security and career progression pathways.

**Case Study 7 – Youth Engagement and Regional Skills Pathways, Western Australia**

Partnerships between the resources sector and community organisations are supporting youth engagement and early employment pathways across regional Western Australia.

Through a long-standing partnership between BHP and the West Coast Eagles, school visits, leadership workshops and football carnivals are delivered across the Pilbara and Goldfields regions to encourage school attendance and promote healthy lifestyles. In the first half of 2025 alone, more than 150 engagement events were delivered across the regions, creating over 500 direct engagement opportunities for local youth.

BHP[10] has also partnered with Royal Life Saving Society Western Australia since 2003 to deliver the Water Safe WA program, investing more than $9 million in regional communities. In FY2025 the program supported eight regional communities, engaged 14,348 Swim and Survive participants — including 2,247 infants — and involved 1,596 young people in the Talent Pool program, creating 88 jobs across regional Western Australia.

Local business resilience forms the third indicator. Contracting economies in local government regions such as Kalgoorlie-Boulder, Broken Hill, Mount Isa, Isaac and East Pilbara depend on predictable operational demand. Civil, mechanical, electrical, environmental, logistics, accommodation and catering businesses invest and employ locally because the demand base is reliable and long-term.

The industry's approach to Aboriginal and Torres Strait Islander economic participation continues to evolve within this broader ecosystem. Experience shows that procurement alone is insufficient to build resilient Aboriginal and Torres Strait Islander economies. Companies are increasingly working with Traditional Owners and governments to co-design capability and participation frameworks aligned to project life, governed effectively and built on commercial discipline and supported capability development.

[9] Department of Mine, Petroleum and Exploration, *Award winners driving change in WA's resources sector*, Government of Western Australia, Perth, 2025 viewed 5 March 2026
[10] BHP, *Community Development Report 2025*, BHP Group Limited, Melbourne, 2025 viewed 5 March 2026

**Case Study 8 – Nolans Project, Northern Territory**

Approximately 140 kms north of Alice Springs, the Nolans Rare Earths Project[11] is being developed under a long-term agreement between Arafura Rare Earths and the Central Land Council on behalf of Traditional Owners. The agreement establishes structured pathways for Aboriginal and Torres Strait Islander participation that extend beyond contracting and are tied directly to the project's projected 38-year operating life. Under the framework, Arafura has committed to achieving around 20 per cent Aboriginal and Torres Strait Islander employment during operations, supported by pre-employment programs, accredited training and onsite workforce development delivered in partnership with regional training providers.

The participation framework also includes governance and commercial capability development for Traditional Owner organisations engaged in project-related activities. Joint committees between Arafura and the Central Land Council oversee implementation, monitor capability targets and align contracting, workforce planning and business development with operational requirements.

Local Aboriginal and Torres Strait Islander businesses are receiving support to build capacity in civil works, environmental services, cultural heritage management, rehabilitation and site services, all areas where long-term, multi-year demand is anticipated. These arrangements are designed to ensure that Aboriginal and Torres Strait Islander participation is supported by governance capability, commercial readiness and a clear trajectory for growth across the life of the mine.

Service viability is the fourth indicator. Remote hospitals, regional airports, childcare services, schools, training organisations and community facilities depend on stable population levels to remain open and staffed. In towns such as Newman, Moranbah and Weipa, long-life mining activity supports the service scale that remote communities require.

**Case Study 9 – Mobile Health Access, Queensland**

In the Isaac region of Central Queensland, access to specialist health services depends on coordinated partnerships that can operate effectively in remote communities. Towns such as Moranbah and Dysart rely on a stable residential population and the service infrastructure supported by long-life mining to make regular visiting medical services viable.

Anglo American partners with Heart of Australia[12] to bring mobile specialist and diagnostic clinics into the region, providing cardiology, endocrinology, respiratory, sleep medicine, sonography and pathology services through purpose-built medical trucks. Heart of Australia conducts more than 10,000 regional consultations each year, with a recurring schedule of visits to Isaac communities that allows residents to receive early detection, chronic disease management and specialist follow-up without travelling long distances to major centres.

These services are supported locally by Isaac Regional Council through infrastructure access, community coordination and integration with existing primary healthcare providers. The presence of long-life mining operations underpins the population stability, transport links and community confidence that make regular specialist outreach viable. Because the region maintains the scale and continuity associated with residential mining workforces, programs like Heart of Australia can operate predictably and reach communities that would otherwise have limited access to specialist medical care.

[11] Northern Territory Environment Protection Authority, *Nolans Project: Arafura Resources Ltd – environmental impact assessments register*, Northern Territory Government, Darwin, 30 October 2024 viewed 5 February 2026
[12] Heart of Australia Foundation, *$1M partnership to expand Heart of Australia services across Central Queensland*, Press Release, 20 January 2020 viewed 5 March 2026

*What this means for Australia's next wave of projects*

Critical minerals development must be understood in the context of regions already shaped by mining. These projects are being delivered into communities where councils, Traditional Owners, local businesses, training providers and service systems are accustomed to long-life industry and understand what it requires.

Across regions such as the Pilbara, Mount Isa, Broken Hill, Cobar, the Barkly, the Gove Peninsula, Far North Queensland, the North West Minerals Province and existing and emerging Victorian provinces, long-life mining has created the foundations that critical minerals projects will rely upon: stable populations, skilled labour markets, availability of contractors and related businesses and regional governance frameworks shaped by generations of resource activity.

The key question now is how governments can reinforce the operating conditions that allow projects to proceed on time and communities to stay strong. Regions that rely on long-life industry need the confidence provided by certainty of regulatory process and timeframes to maintain population stability, employment and service viability.

For industry, the next wave of critical minerals projects requires the same disciplines that underpin existing long-life operations: early engagement, clear workforce planning, capability building for local and Aboriginal and Torres Strait Islander businesses, coordinated infrastructure planning and lifecycle management. These are established practices, not emerging concepts.

With stable policy settings, predictable approval pathways and coordinated planning across jurisdictions, critical minerals projects will extend a proven model of regional development into the next generation of activity. These projects represent the continuity required to build on an operating approach that has sustained remote communities for more than fifty years. In some cases, this next phase of development will not come from entirely new projects, but from new minerals opportunities emerging within existing mining and processing systems.

*New opportunities from established operations*

Not all critical minerals development will occur through large greenfield mines. In a number of cases, new supply opportunities arise from established mining and refining systems where additional minerals can be recovered from materials already being extracted and processed.

These opportunities build on existing infrastructure, workforce capability and regulatory frameworks that have developed around long-life operations. Because they are integrated into operating industrial systems, they can often proceed with smaller physical footprints while extending the economic contribution of established mining regions.

Projects of this nature can strengthen Australia's critical minerals position while making more efficient use of resources already being developed. In many cases they involve the recovery of strategically important minerals from existing refining streams, mine residues or processing systems that were historically focused on primary commodities.

While proximity to established operations can provide a practical head start on development, these projects still operate within highly competitive global markets that are often characterised by dominant low-cost producers and relatively small total market volumes. Establishing new supply therefore requires coordination between industry, governments and regional communities to ensure projects can proceed with clear policy settings and aligned investment conditions.

**Case Study 10 – Proposed Gallium Project, Western Australia**

Gallium is naturally present in bauxite and can be recovered during the alumina refining process. It is a critical mineral used in semiconductors, advanced electronics and defence technologies and is recognised as strategically important by governments including Australia, the United States and Japan.

In October 2025 the Australian and United States Governments announced[13] support for the development of a gallium extraction facility to be co-located at Alcoa of Australia's Wagerup Alumina Refinery in Western Australia. Operated by Alcoa, the facility would have the capacity to produce approximately 100 metric tonnes of gallium annually at full production — equivalent to around 10 per cent of the current global market.

The proposed facility would operate within the existing Wagerup refinery footprint and recover additional value from bauxite already mined and processed through the alumina refining system. Because the project is integrated into an established industrial operation, it would not require significant additional land clearing and the additional energy demand can be met through the refinery's existing power generation infrastructure. Wagerup is already among the lowest carbon-intensity alumina refineries globally and the gallium extraction process is expected to emit water vapour, hydrogen and oxygen without materially changing the refinery's overall emissions profile.

Indicative modelling suggests the project could support around 150 direct and indirect jobs during construction and between 15 and 20 ongoing operational roles at Wagerup. The refinery forms part of a broader alumina production system in Western Australia's Peel and South West regions, which together support approximately 2,700 residential jobs across Alcoa's Wagerup and Pinjarra refineries and the Huntly and Willowdale bauxite mining operations.

[13] Albanese, A., *Historical critical minerals framework signed by President Trump and Prime Minister Albanese*, Commonwealth of Australia, Canberra, 21 October 2025 viewed 10 March 2026

## 4. REGIONAL COMMUNITIES ACROSS THE MINING LIFECYCLE

Regional communities experience mining as a sequence: exploration signals possibility; construction transforms local demand and business activity; operations anchor population and services; downturns test resilience; and closure requires careful coordination to maintain continuity.

Critical minerals projects will move through these same stages, drawing on decades of established practice across existing commodities. The strength of regional outcomes depends on how well each stage is planned and integrated into the community around it.

*Exploration and Early Investment*

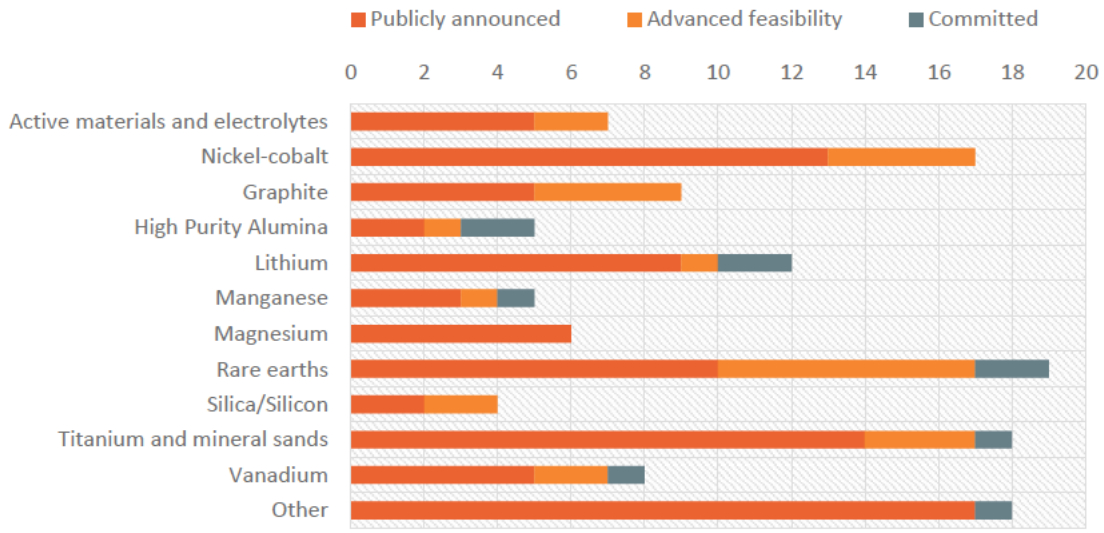
Exploration is the first point at which communities begin assessing whether a prospective project will deliver long-term benefits or short-term disruption. In regions shaped by long-life industry, early clarity matters in helping to understand workforce assumptions, land use considerations, potential infrastructure implications and the scale of activity enable councils, training providers and local businesses to prepare.

Established practice across the industry includes early engagement with councils, Traditional Owners and regional development organisations; clear communication of workforce models; early identification of local and Aboriginal and Torres Strait Islander suppliers capable of participating in early works, and preliminary coordination around anticipated demand for housing, accommodation and community infrastructure.

These early practices give regional communities confidence that if a project progresses, it will do so in a way that strengthens their economic base and provides hope and opportunity for years to come.

**Figure 2: While the project pipeline is strong, average lead time for new mines is 18 years[14]**

Number of critical minerals projects in the Resource and Energy Major Projects list by stage




Source: DISR, *Resource and Energy Major Projects*, 2025

[14] Estimate of average mine to go from discovery to production: S&P Global, Market Intelligence, released 10 April 2024.

**Case Study 11 – Goldfields Exploration Ecosystem, Western Australia**

Across Western Australia's Eastern Goldfields, exploration activity operates within one of Australia's most established mining regions. The broader Goldfields–Esperance[15] region supports almost 38,000 jobs and generates close to $40 billion in annual economic output, with mining and mining services forming a central part of that regional economy.

Kalgoorlie–Boulder functions as the operational hub for exploration programs across the surrounding mineral belts. Drilling contractors, geological consultancies, environmental specialists, laboratories and logistics providers operate across the region to support exploration activity undertaken across a large network of mineral tenements.

Exploration programs typically involve early engagement with local governments, Traditional Owners and regional development organisations to coordinate land access, workforce planning and service requirements associated with drilling campaigns and field programs. Local businesses frequently participate in exploration activities through drilling support, environmental monitoring, heritage surveys, transport and site logistics.

Through these early activities, councils, training providers and regional businesses gain visibility of the scale and nature of exploration programs occurring in their region, allowing them to prepare for the potential progression of projects through construction and operations.

Early-stage readiness in a mature mining ecosystem means skilled contractors already in place, a workforce that understands the rhythm of exploration approvals and mobilisation, and a community that knows how to integrate early activity without disruption.

*Construction*

Construction is the most intense period of short-term labour demand and capital inflow.

Without strong planning, it can put pressure on housing, rental markets, services and local infrastructure. With good planning, construction strengthens local capability, builds long-term business capacity and prepares the community for operations.

The industry's experience across iron ore, coal, bauxite and gold demonstrates that the difference lies in sequencing: housing and accommodation must be planned before peak workforce arrival; procurement pathways must be structured early to give local firms the time to scale, and councils must have reliable information on water, roads, waste and emergency service demand.

**Table 3: Construction job profile for Critical Minerals Major Projects pipeline**

| State or Territory | Number of prospective projects | Forecast employment | |
|---|---|---|---|
| | | Construction phase | Operating phase |
| Western Australia | 65 | 9,875 | 4,345 |
| Queensland | 22 | 3,864 | 2,443 |
| Northern Territory | 11 | 890 | 567 |
| New South Wales | 10 | 4,490 | 2,074 |
| Victoria | 10 | 975 | 902 |
| South Australia | 10 | 375 | 245 |
| Tasmania | 2 | na | na |

Source: DISR, *Resource and Energy Major Projects*, 2025

[15] The Goldfields-Esperance Development Commission, *Economic Profile*, Government of Western Australia, Kalgoorlie viewed 6 March 2026

**Case Study 12 – Moranbah Construction Management, Queensland**

Moranbah has faced cycles where large construction workforces drove extreme volatility in housing markets. During the last major boom to 2013, per weekly rental costs spiked to more than $2,000 per week,[16] displacing some residents and undermining community stability.

Learning from this, BMA[17] and Isaac Regional Council established a coordinated construction-readiness framework:

- About 90 per cent of peak construction workers were housed in dedicated accommodation villages, avoiding pressure on the residential market
- Workforce increases were capped and sequenced in line with service capacity across health, emergency response, waste and water systems
- Local procurement requirements were embedded into civil, engineering and services contracts, sustaining hundreds of millions of dollars in local contracting activity
- Housing and land-release coordination was undertaken jointly with council, ensuring future demand could be met without distortion.

This resulted in a construction program that strengthened the regional business ecosystem, protected local housing affordability and supported community confidence.

**Case Study 13 – Pilbara Construction Readiness, Western Australia**

Mining development in the Pilbara requires long-term coordination between industry and local governments well before construction activity reaches its peak.[18] Through BHP's Western Australia Iron Ore (WAIO) operations, local councils receive forward planning information on workforce arrivals, temporary accommodation requirements, heavy vehicle movements and expected demand on water, waste and road infrastructure. This early coordination allows local governments to plan road upgrades, waste services, health coordination and housing supply ahead of major project activity.

Advance visibility of construction timelines also enables regional businesses to prepare for procurement opportunities linked to large-scale project development. Local Aboriginal and Torres Strait Islander and non-Indigenous contracting firms can expand capability in areas such as civil works, transport services, accommodation provision and environmental management, ensuring project investment flows through to local employment and business activity.

This type of early coordination reflects the scale of infrastructure and workforce planning required to support major resource developments in remote regions such as the Pilbara, where mining operations operate alongside regional towns, transport networks and essential community services.

[16] Huxley, J., *Moranbah rents hit high*, ABC News, 3 August 2011 viewed 23 February 2026
[17] CCHange Sustainable Solutions Pty Ltd, *Bowen Basin Coal Growth Project Housing Impacts Study and Plan*, Queensland Government, Brisbane, 2012
[18] BHP, *Community Development Report 2025*, BHP Group Limited, Melbourne, 2025 viewed 23 February 2026

*Operations*

Operations are the foundation of regional stability. They underpin population levels, schooling, childcare, health services, small business viability and local government planning. Long-life operations provide career pathways, apprenticeships, workforce development, multi-year procurement and the confidence required for families to settle in remote regions.

Operational continuity has strengthened regional Australia for more than fifty years. Critical minerals projects will continue this pattern, anchoring jobs, skills, infrastructure and service demand over long project lives.

**Table 4: Average operating mine life by commodity**

| Commodity | Ore reserves remaining (years) |
|---|---|
| Bauxite | 18 |
| Black Coal | 26 |
| Cobalt | 36 |
| Copper | 25 |
| Gold | 12 |
| Iron Ore | 13 |
| Lead | 14 |
| Lithium | 43 |
| Nickel | 26 |
| Silver | 15 |
| Zinc | 14 |

Source: *Geoscience Australia, AIMR 2025,* table 6: Average reserve life and resource life (years) for selected commodities as at December 2024.

**Case Study 14 – Weipa Operational Model, Queensland**

Weipa[19] offers a clear example of how operations sustain remote communities. Bauxite operations support approximately 1,400 direct employees and over 700 contracting firms across civil works, marine operations, land management, environmental services and logistics. Approximately 25 per cent of the workforce is Aboriginal and Torres Strait Islander, supported by structured pathways in trades, operations, laboratory work and leadership roles.

Operational stability maintains:

- Local aviation access, handling an average annual passenger movement of approximately 82,332 in the five years to 2024-25,[20] enabling medical evacuations, visiting specialists, freight and workforce mobility
- Two schools serving roughly 900 students, which remain viable because families stay in the region
- A hospital and health centre that depend on the population base for staffing
- Local businesses that thrive because demand is predictable and tied to multi-year contracting cycles.

Long-life operational activity is the reason Weipa has stable population levels, functioning services and a viable local economy in a remote location.

[19] Rio Tinto, *Weipa Operations 2017 Sustainable Development Report*, Rio Tinto Limited, Melbourne, 2017 viewed 23 February 2026
[20] Bureau of Infrastructure and Transport Research Economics, *Airport Traffic Data 1985-86 to 2024-25*, Commonwealth of Australia, Canberra, 2025 viewed 3 February 2026

### Case Study 15 – Mount Isa Regional Workforce and Service System, Queensland

Mount Isa remains one of the clearest demonstrations of how long-life operations anchor an entire regional service system in northern Australia. Mining operations centred on Mount Isa[21] employ approximately 3,200 people across copper, zinc, lead and silver operations, making it one of the largest employers in north-west Queensland.

This employment base sustains a regional population of approximately 18,000 people,[22] which in turn underpins essential services that would not otherwise exist at scale in a remote inland centre:

- Mount Isa Hospital operates as the main referral hospital for north-west Queensland, providing specialist services for communities across a region of approximately 300,000 square kilometres
- Aviation services able to accommodate more than 5,000 aircraft movements in 2024-25,[23] including regular medical specialist fly-ins and emergency retrievals
- Mount Isa TAFE provides trade and technical training aligned with the workforce needs of the regional mining sector, including apprenticeships and qualifications in electrical, mechanical and diesel fitting that support employment pathways across north-west Queensland
- Local government staffing and capital planning rely on revenue streams and population stability supported by mining-derived economic activity

Mount Isa's service system functions because long-life operations maintain predictable demand. When commodity prices fall, the effects are immediate: school enrolments dip, specialist rosters become harder to fill and small businesses face reduced turnover. When operations are stable, the entire regional service system stabilises with them.

### Case Study 16 – Groote Eylandt, Northern Territory

The Groote Eylandt region provides one of Australia's strongest examples of structured Aboriginal and Torres Strait Islander economic participation embedded over decades of mining activity. With a population[24] of approximately 2,500 people, more than 60 per cent identify as Aboriginal or Torres Strait Islander, the local economy depends on long-life industry for employment, training, revenue and community services.

The operational workforce includes Aboriginal and Torres Strait Islander employees working across production, processing, maintenance, land management, rehabilitation, environmental monitoring and community liaison roles. Through long-standing agreements[25] with Traditional Owners, structured employment and economic participation programs have delivered:

- Accredited training pathways delivered through the Anindilyakwa Training Centre, supporting qualifications in conservation and land management, civil construction, community services and workplace safety

[21] Mining Technology, *Mount Isa Copper Mine Queensland Australia*, GlobalData, London, 2020 viewed 23 February 2026
[22] Australian Bureau of Statistics, *2021 Census QuickStats: Mount Isa (C)*, Commonwealth of Australia, Canberra, 2022 viewed 24 February 2026
[23] Bureau of Infrastructure and Transport Research Economics, *Airport Traffic Data 1985-86 to 2024-25*, Commonwealth of Australia, Canberra, 2025 viewed 24 February 2026
[24] Australian Bureau of Statistics, *2021 Census QuickStats: Anindilyakwa (R)*, Commonwealth of Australia, Canberra, 2022 viewed 24 February 2026
[25] Department of Social Services, *Stage two of historic Groote Eylandt Regional Partnerships Agreement*, Commonwealth of Australia, Canberra, 2009 viewed 24 February 2026

- Aboriginal and Torres Strait Islander business capability development supporting local enterprises providing services in civil works, rehabilitation, logistics, landscaping, community transport, cultural heritage and environmental services
- Governance capability programs for Traditional Owner organisations, supporting financial management, project oversight and community development planning aligned with long-term operational activity.

Operational stability ensures these programs function at scale. Aboriginal and Torres Strait Islander businesses secure multi-year contracts linked to rehabilitation, civil maintenance, land management and environmental responsibilities. Employment pathways remain viable because training aligns with predictable operational demand. Community organisations can retain skilled staff because long-life mining supports population stability, service funding and transport links.

*Care and Maintenance*

Downturns test the resilience of regional communities. How a company manages a shift into care and maintenance – when mines are put into 'idle mode' because of commodity price downturns or other factors affecting viability – determines whether a region maintains workforce capability, supplier continuity and essential services.

Effective strategies refined across decades include retaining as many local workers as possible, protecting supplier ecosystems through interim packages, maintaining community contributions and preserving assets for a potential restart. Poorly managed downturns can hollow out a community quickly; responsibly managed care and maintenance can preserve regional capacity.

**Case Study 17 – Kambalda Nickel Cycle, Western Australia**

Kambalda's nickel operations provide one of Australia's clearest examples of how commodity cycles shape a regional community. Nickel mining in the district has operated since the late 1960s, with periods of strong global demand followed by downturns that have seen shafts and processing infrastructure move into care and maintenance.

During the most recent nickel downturn, operations across the Kambalda system were placed into care and maintenance, resulting in significant workforce reductions and disruption to local contractors and suppliers supporting the mining sector. At the deepest point of the downturn, more than 250 jobs[26] were lost across the Kambalda nickel operations, with flow-on impacts across drilling contractors, equipment suppliers, transport firms and local businesses in the surrounding Goldfields region.

Despite these impacts, strong local capability and coordinated planning have allowed parts of the workforce to be retained and redeployed. Contractors servicing nickel operations have diversified across nearby gold and lithium projects, while mechanical workshops, drilling operators, fabrication firms and environmental service providers have maintained core staff through interim work programs and cross-commodity deployment across the broader Goldfields mining sector.

Kambalda demonstrates the importance of responsible downturn management: preserving skills, keeping supplier ecosystems intact and ensuring the region remains able to respond quickly when commodity conditions improve.

[26] Lucas, J., *Andrew Forrest's Wyloo Metals to shutter Kambalda nickel mines after price slump*, Australian Broadcasting Corporation, Sydney, 2024 viewed 3 February 2026

*Closure and Transition*

Closure is a predictable phase, not an unexpected event. Communities fare best when closure planning begins early, includes transparent timelines, provides structured workforce transition pathways and maintains regional capability.

More than 100 Australian mines are coming to the end of their life within the next 15 years. Gold mines account for more than half of those nearing the end of their productive lives, with copper and iron ore being the next most common.[27]

Effective closure planning includes early workforce transition planning, rehabilitation work packages, business diversification support, and coordinated engagement with councils and Traditional Owners on future land use, community services and economic pathways.

**Case Study 18 – East Arnhem, Northern Territory**

When alumina refining in Gove moved toward closure and then care and maintenance, the potential shock to the region was immense.

The refinery had supported more than 1,100 direct and indirect jobs[28] and underpinned schooling, health services, transport networks and local businesses.

A coordinated transition process[29] involving Rio Tinto, the Traditional Owners and governments helped avoid an abrupt economic shock:

- More than 300 workers were redeployed into port, mining, rehabilitation and community roles
- Local contractors were retained through long-term rehabilitation and community infrastructure programs
- Transition support measures were implemented for businesses and residents, including financial assistance and economic diversification planning to stabilise the regional economy
- Early coordination with health providers, schools and councils helped to stabilise service delivery and population expectations.

Gove demonstrates how properly managed transition planning[30] preserves regional capability and avoids the rapid population decline that often follows major industrial closure. It is the clearest example in northern Australia of closure handled as a lifecycle responsibility rather than an endpoint.

[27] S&P Global, Geoscience Australia, company reports.
[28] McGrath, P., *About 1,100 jobs cut as Rio Tinto suspends production at Gove alumina refinery in the Northern Territory*, Australian Broadcasting Corporation, Sydney, 2013 viewed 3 February 2026
[29] Schubert, S., *Rio Tinto reveals rescue package for future of Nhulunbuy after alumina refinery closure*, Australian Broadcasting Corporation, Sydney, 2014 viewed 3 February 2026
[30] Productivity Commission, *Transitioning Regional Economies – Submission No. 37 – Northern Territory Government*, Australian Government, Canberra, 2016

## 5. POLICY STABILITY AND COMMUNITY CONFIDENCE

Regional communities depend on predictable investment and coordinated planning.

When governments provide clear, stable operating settings, critical minerals projects can move from approval to construction in a way that supports workforce planning, local procurement, infrastructure sequencing and business investment. These are the conditions that allow communities to plan for growth, maintain services and sustain confidence in their future.

Stable policy settings allow training providers to align skills delivery with project mobilisation schedules; enable housing, land release and essential infrastructure to be sequenced appropriately; give local suppliers the confidence to invest in new capability, and support councils and Traditional Owners to plan around projected activity. When these elements work together — and when they align, regions experience stronger labour markets, more resilient services and better-managed economic transitions.

Where settings are unclear, inconsistent across jurisdictions or subject to change late in the project lifecycle, investment slows and communities feel the consequences first and hardest.

Delays can translate into deferred jobs, stalled procurement, reduced business confidence and pressure on local planning processes. For remote towns with narrow population bases, prolonged uncertainty can undermine exactly the service stability and economic foundations that communities rely on.

For existing mining communities looking to critical minerals development to provide economic continuity, delays in the project pipeline can create a major disjunction in the local economy that is difficult to repair and makes mobilisation of resources for the next project more challenging.

**Case Study 19 – North West Minerals Province, Queensland**

The North West Minerals Province illustrates how stable policy settings and coordinated planning support regional confidence. Long-term government strategies[31] for the province have focused on strengthening the investment environment and supporting continued mining development across the Mount Isa to Cloncurry corridor.

Clear government signalling and visibility of project pipelines have allowed regional stakeholders to plan around anticipated development activity:

- A publicly available project pipeline provides early visibility of proposed developments, expected employment and project timing, allowing businesses and communities to anticipate investment and workforce demand
- Regional economic strategies emphasise the role of mining in sustaining employment and supply chains across north-west Queensland, supporting coordinated infrastructure and workforce planning
- Targeted investment in regional training infrastructure, including upgrades to Mount Isa TAFE's engineering and trade facilities, has aligned skills development with projected mining workforce demand.

The North West Minerals Province demonstrates how stable policy settings and coordinated planning allow companies, councils and training providers to prepare for development activity and invest with confidence.

[31] Department of State Development, Infrastructure and Planning, *A strategic blueprint for Queensland's North West Minerals Province*, Queensland Government, Brisbane, 2017

Critical minerals investment also creates an opportunity for governments to align their own regional development objectives. Long-life mining can anchor population growth, justify service expansion and provide the business base that allows broader economic diversification to occur — but these outcomes do not happen automatically. They require coordinated federal and state leadership on infrastructure, land-use planning, workforce development and regional investment sequencing. Co-investment in enabling infrastructure, including transport, power, water and common-user facilities, ensures that minerals development becomes a catalyst for long-term regional resilience rather than an isolated project. Mining can contribute strongly to these outcomes, but government coordination is essential to unlock their full potential.

Housing availability is often the first practical indicator of whether new economic activity will translate into sustained population growth in regional communities. Where investment pipelines are visible and project timelines are credible, housing markets begin to respond. Local governments can plan land release, developers can justify new construction and service providers can recruit staff with confidence that population demand will be sustained.

In many regional communities, housing shortages are not simply a function of construction costs or land supply. They reflect uncertainty about future demand. Where population decline or volatile economic conditions have made development risky, private investment in housing has stalled for decades. When long-life mining projects create a credible pathway for employment and population stability, those conditions can change quickly, unlocking development that would not otherwise occur

**Case Study 20 – Wimmera Southern Mallee, Victoria**

The Wimmera Southern Mallee region in western Victoria comprises five municipalities and a combined population of approximately 55,000 people.[32] The regional economy has historically been built on grain production, livestock, legumes and wool, with structural change in agriculture since the 1960s seeing farms consolidated into larger enterprises requiring fewer workers.

Regional economic diversification and workforce attraction have become priority policy objectives for governments across the Wimmera Southern Mallee region.[33] Housing availability has emerged as a significant constraint on regional growth, with local stakeholders identifying limited housing supply as a barrier to attracting new workers and supporting business expansion.[34]

Critical minerals investment is beginning to change these conditions. Two mineral sands projects in the Wimmera Southern Mallee — the Donald Project and the Avonbank Project — have received regulatory approval, while the Goschen Project in the neighbouring Loddon-Mallee region is also approved and the Wimmera Critical Minerals Project is progressing through approvals.

Together these projects are estimated to support approximately 1,200 construction and operational jobs across multi-decade mine lives. Anticipated workforce demand is already influencing regional housing planning, with local governments and developers engaging with project proponents to explore new townhouse and medium-density housing developments suitable for workers and families relocating to the region.

The prospect of long-life critical minerals operations is providing the population stability and investment confidence required for new residential development to proceed in a region where housing supply has historically constrained workforce growth.

[32] Regional Development Victoria, *Wimmera Southern Mallee Regional Partnership*, Victorian Government, Melbourne, viewed 10 March 2026
[33] Regional Development Victoria, *Wimmera Southern Mallee Regional Partnership Roadmap*, Victorian Government, Melbourne, 2019
[34] Department of Transport and Planning, *Wimmera Southern Mallee Regional Growth Plan*, Victorian Government, Melbourne, 2014

The relevant policy question is therefore not whether the industry can meet the expectations reflected in the Terms of Reference, but how government settings can best support delivery, reduce unnecessary friction and enable timely progression from approval to construction and operation. For regional and remote communities, these operating settings have direct economic and social consequences. Where minerals projects progress with certainty, they anchor local economies, support population retention, justify investment in enabling infrastructure and provide the basis for long-term employment and business development. Where delivery is delayed or destabilised, the impacts are borne locally through deferred jobs, constrained business activity and reduced confidence.

**Case Study 21 – Central West Orana Region, New South Wales**

The Central-West Orana region illustrates how prolonged and overlapping approvals can slow regional development momentum. The Renewable Energy Zone was designed to coordinate generation projects, transmission infrastructure and regional investment across the region, giving councils, suppliers and training providers visibility over the expected sequencing of development activity.

However, the New South Wales Parliamentary inquiry[35] into Renewable Energy Zones identified ongoing concerns about approval complexity, land access arrangements and regulatory coordination affecting project timelines. The report notes that uncertainty around approvals and project sequencing can create difficulties for regional communities attempting to plan infrastructure, workforce development and local investment around anticipated project activity.

The experience of the Central-West Orana region shows that when project timelines become uncertain, the effects extend beyond individual developments. Delays can disrupt regional planning, weaken business confidence and slow the broader economic momentum that major infrastructure and energy projects are intended to generate.

**Case Study 22 – New Acland Stage 3, Queensland**

The approval pathway for New Acland Stage 3 demonstrates how prolonged legal and regulatory processes can destabilise regional labour markets. The project expansion was first proposed more than a decade before final approvals were secured and became the subject of extensive litigation, culminating in proceedings before the High Court of Australia.[36]

During this period of uncertainty, the existing operation reduced staffing and suspended apprenticeships while workers and contractors sought more predictable employment elsewhere. Businesses across the Darling Downs — including engineering workshops, fuel suppliers, transport operators and accommodation providers — experienced reduced demand as project timelines remained unresolved.

When final approvals were ultimately secured, the region had to rebuild workforce capability and supplier capacity that had previously supported the operation. The approved Stage 3 expansion[37] supports approximately 300 construction jobs and around 400 ongoing operational roles, illustrating both the economic significance of the project and the regional disruption that extended approval pathways can create.

[35] New South Wales Parliament, *Report No. 62 – Impact of Renewable Energy Zones (REZ) on rural and regional communities in New South Wales*, Portfolio Committee No. 4 – Regional NSW, Sydney, 2025
[36] *Oakey Coal Action Alliance v New Acland Coal Pty Ltd* [2021] HCA 2
[37] New Hope Group Limited, *New Acland Stage 3 officially opened*, Press Release, Brisbane, 3 May 2023 viewed 3 February 2026

For emerging critical minerals provinces — from the Pilbara and North West Minerals Province to the Gove Peninsula, Broken Hill, Gippsland and the Barkly — predictable policy enables the same long-life economic foundations that have sustained communities for more than fifty years. These regions are ready for investment; what they require is a planning and regulatory environment that allows new projects to progress at a pace that matches regional workforce development, housing preparation and infrastructure needs.

Clear, coordinated and durable policy settings give communities confidence that investment will proceed, that jobs will materialise and that the services they rely on — schools, health care, childcare, airports and housing markets — can be maintained and strengthened. These are practical requirements, not abstract considerations, and they sit at the centre of what regional communities expect when new critical minerals projects are proposed and announced.