

5/08/2026

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Dear Mount Isa Transformation Study Team,

QRC Submission to the 2026 Mount Isa Region Economic Transformation Study

The Queensland Resources Council (QRC) welcomes the opportunity to provide a submission to the Mount Isa Region Economic Transformation Study.

The study comes at a critical time for North West Queensland. The region is entering a period of significant economic transition following the cessation of underground copper mining in Mount Isa and ongoing uncertainty regarding the long-term future of strategic processing infrastructure in the region. At the same time, the North West Minerals Province (NWMP) presents one of Australia's most significant opportunities for future copper and critical minerals development and remains central to Queensland's future economic growth, export performance and contribution to global supply chains.

QRC is pleased to attach its North West Minerals Province Strategy for consideration as part of this consultation process. Developed in consultation with industry, the strategy outlines the key actions, policy settings and infrastructure investments required to unlock the next generation of resource development across the NWMP and support the long-term economic transformation of Mount Isa and the broader north west region.

A key finding of the strategy is that the region's future is constrained a range of interconnected structural challenges including energy affordability and access, transport infrastructure, workforce attraction and retention, water planning frameworks and the time required to bring new projects into production. These issues cannot be addressed by individual proponents acting alone and require a coordinated response from governments at all levels working in partnership with industry.

QRC submits a successful transformation strategy for Mount Isa should be centred on attracting and accelerating new investment into the NWMP. The scale of the mineral endowment and project pipeline across the province provides the most realistic pathway to sustaining regional employment, maintaining critical industrial infrastructure, growing population and securing long-term economic prosperity. Realising this opportunity will require coordinated planning, common-user infrastructure solutions, regulatory efficiency and greater certainty for investors.

In particular, QRC encourages consideration of:

- A coordinated development framework for the NWMP led through a multi-tier jurisdiction whole-of-government approach, supported by the Office of the Coordinator-General.
- Investment and coordination of critical enabling infrastructure, including energy, transport and water systems, with a focus on common-user access models.
- Measures to improve the competitiveness and resilience of the Mount Isa to Townsville freight corridor and support strategic infrastructure investments.
- Initiatives that improve regional liveability, housing availability and workforce attraction and retention outcomes.

- Planning and investment settings that provide greater certainty to resource investors and reduce barriers to new project development.

Importantly, the transformation of Mount Isa should focus on leveraging the region's existing competitive advantages, including its world-class mineral endowment, established processing capability, skilled workforce and strategic role in Australia's critical minerals future. The strongest pathway to economic transformation is growing the next generation of mining, processing and critical minerals projects that can sustain and expand the region's industrial base. QRC appreciates the opportunity to contribute to the study and would welcome further engagement as the work progresses.

Yours sincerely,
Matt Tapsall
Director, Resources and QEC

QRC North West Minerals Province Strategy

5 August 2026

Executive Summary

The North West Minerals Province (NWMP) represents one of Australia's most significant untapped opportunities for minerals and metals development, particularly the critical minerals our closest and longest allies are seeking for AI, electrification, and defence industry growth. Developing this region and its resources has the potential to underpin long-term economic growth, regional development, and global supply chain resilience for Queensland and the nation. This opportunity builds on the strong foundation established by existing operations in the region. Long-standing producers have sustained mining activity in the NWMP for decades, supporting regional communities, exporting Queensland resources globally, and contributing significantly to the state's economy.

However, despite this established base and a growing pipeline of emerging copper and critical minerals projects, investment in the NWMP is not progressing at the pace or scale required by international investors to realise its full potential.

This reflects a structural challenge: the NWMP is not constrained by resource potential, but by the availability, coordination, and cost of enabling infrastructure and policy settings. Energy, water, transport, and workforce attraction and retention challenges are interdependent and region-wide, requiring coordinated solutions that extend beyond individual projects.

Queensland's own experience demonstrates large-scale resource development does not occur in isolation. The development of the Bowen Basin coal industry and the State's LNG export sector was underpinned by deliberate and coordinated government action, intervention, and investment including in enabling infrastructure, facilitation of common-user access models, and use of planning mechanisms to de-risk early-stage investment. These frameworks enabled multiple proponents to enter the market, accelerated project development, and delivered enduring economic benefits to Queensland.

A similar approach is now required for the NWMP. The NWMP should be viewed as a developing economy with government actions to reflect this status, and the actions of governments operating in the critical mineral space globally.

To unlock the region's full potential, governments at all levels must take a more active role in planning, coordinating, and facilitating critical infrastructure as a whole system, not as a series of discrete, user-pays projects. This is particularly important in the NWMP, where many emerging developers do not have the balance sheets required to fund major enabling infrastructure upfront, and where offtake and downstream markets for critical minerals are still developing. Government should therefore ensure infrastructure planning, funding and access arrangements do not rely on individual proponents carrying disproportionate early-stage risk or entering into rigid take-or-pay obligations before markets and project pipelines have matured.

This includes recognising the role of common-user infrastructure—across energy systems, transport corridors, water resources, processing capacity, social and community infrastructure—as a foundational enabler of investment. Without shared infrastructure solutions, smaller and mid-tier projects will continue to face prohibitive barriers to entry, limiting the breadth and resilience of the region's development pipeline.

Certainty is equally critical. Investors require clear, transparent signals on the timing, sequencing, and cost of major enabling infrastructure, as well as confidence that broader policy settings will support long-term development.

The scale and complexity of these challenges point to the need for a whole-of-government coordination mechanism. The role of the Coordinator-General should be considered as a key enabler in accelerating the next phase of development in the NWMP. The use of coordinated development frameworks such as those being progressed in the Taroom Trough provides a model for how strategic regions can be unlocked through streamlined approvals, coordinated infrastructure delivery, and a clear long-term development pathway.

The NWMP is at an inflection point. With targeted government action, intervention, and investment the region can transition from a constrained, high-cost operating environment to a globally competitive minerals province. Without it, Queensland risks under-realising a generational opportunity.

Together with the Queensland Exploration Council's Copper Cooperative Report, which focuses on strengthening exploration investment and supporting the next generation of discoveries, this strategy provides a complementary blueprint for partnership between governments at all levels and the resources industry to develop infrastructure, coordinated planning, and policy settings that unlock investment at scale and secure the NWMP's role in Queensland's next phase of resource development.

Key Enabler 1 – Speed to market

CHALLENGES

For proposed resource projects to deliver lasting benefits for local communities, regional economies and be effectively rehabilitated, they must be supported by a rigorous approvals framework. However, Queensland must also ensure its regulatory framework remains competitive with other resource-producing jurisdictions, particularly economies with comparable standards such as Canada and the United States. In a global market where capital is mobile, unnecessary delays or uncertainty can direct investment to jurisdictions with clearer and more efficient pathways to production, resulting in Queensland missing resource development and the associated community and economic benefits.

According to QRC analysis, resource projects in Queensland take on average 12-16 years to move from discovery through approvals to production. The need to be competitive in this space is reinforced by those looking to invest in critical minerals. When looking at making an investment decision in critical minerals one of the most important aspects looked at by global investors is the speed to market of a project. Followed by processing capacity and the reliability of the base load power source.

To unlock the region's full potential, governments at all levels must take a more active role in planning, coordinating, and facilitating critical infrastructure as a system not as a series of discrete, user-pays projects. The NWMP should be thought of as a developing economy and treated as such from a planning, investment, and infrastructure development position rather than approaching it like the developed economies of more established resources basins. Government's need to look at the actions, intervention, and investment of various governments globally who are developing their critical minerals industry and supply chains.

This includes recognising the role of common-user infrastructure—across energy systems, transport corridors, water resources, and processing capacity—as a foundational enabler of investment. Without shared infrastructure solutions, smaller and mid-tier projects will

continue to face prohibitive barriers to entry, limiting the breadth and resilience of the region's development pipeline.

PROPOSED DIRECTION

The Queensland Government recognises this issue, not just for critical minerals but for all resource projects, and has been active in making changes to reduce the time taken for approvals while maintaining the rigor of the approvals process. An example of this is the new approvals regime implemented to take advantage of oil reserves in the Taroom Trough to boost the nation's resilience to oil shocks. Here a coordinated development plan framework has been developed, led by the Coordinator-General, which establishes a whole-of-basin framework to streamline infrastructure coordination, coordinate approvals across agencies and ultimately accelerate project delivery timelines. This approach is also reflected in proactive common-user infrastructure initiatives already underway, including the Queensland Resources Common User Facility and the FlexiLab, which demonstrate how shared infrastructure can reduce barriers for emerging proponents and support the development of new critical minerals supply chains. Recently the Government also established the Office of the Coordinator-General (OCG) lead Cross-Agency Assessment Team (CAAT) to coordinate approvals for three major mineral and coal projects, with the aim of reducing regulatory duplication, accelerating project delivery and providing greater investment certainty.

Applying a similar approach to the NWMP would:

- Provide a central point of coordination across agencies and infrastructure streams;
- Allow the Government to identify opportunities for co-investment and collaboration;
- Enable strategic sequencing and co-investment in common-user infrastructure;
- Reduce project risk and approval complexity;
- Support aggregation of demand across multiple proponents; and
- Strengthen investor confidence in the region's long-term development.

Key Enabler 2 – Energy affordability and access

CHALLENGES

Access to affordable, reliable, and scalable energy is critical to the unlocking of the NWMP. Energy access is a regional constraint directly shaping investment decisions, project timing, and the viability of existing operations and future developments.

Mining and processing operations in the region are constrained by high-cost and isolated power supply arrangements. These constraints damage project economics, limit expansion opportunities, and create uncertainty for investors. At the same time, to support the critical processing infrastructure at the Mount Isa smelter the NWMP is expected to support a significant pipeline of smaller and mid-scale copper developments. Operations which require dependable baseload energy as well as flexible supply to support variable processing loads.

The proposed North West Power System (NWPS) and CopperString are foundational infrastructure for the region and provide an essential pathway to reduce system costs and

improve connectivity. However, to make investment decisions proponents require certainty around delivery timeframes and sequencing of these projects, along with the pricing they will deliver. Without this clear picture proponents face delays in capital allocation, and projects risk being deferred, proceeding at a reduced scale, or requiring substantial capital investment.

Some proponents cannot rely solely on the NWPS or large-scale transmission infrastructure for their energy needs so solutions in the NWMP need to go further. Many operations, particularly small to mid-scale mines, will require fit-for-purpose, modular and locally available energy options to remain viable, particularly where load is modest or distance from major nodes is significant.

This is why energy solutions in the NWMP cannot be focused on a single project or technology. Priority needs to be on a system wide solution which delivers:

- Certainty on price and timing, to support investment decisions and financing;
- Reliability and firm capacity, to underpin continuous mining and processing operations;
- Flexibility, to accommodate both large operations and smaller, emerging projects; and
- Competitiveness, ensuring energy costs do not erode Queensland's investment attractiveness.

For explorers and smaller developers, the challenge is more acute. High upfront connection costs, "user pays" models for transmission, and limited access to existing infrastructure risk excluding new entrants and slowing the pipeline of future production.

PROPOSED DIRECTION

To unlock the potential of the NWMP, a broader, integrated energy approach is required:

- Deliver transmission with certainty - provide clear, transparent timelines and pricing frameworks for the NWPS and CopperString, to enable investment decisions and capital raising.
- Adopt a regional system approach with integrated planning - treat energy infrastructure as enabling regional development integrated with investment in water, rail, and processing infrastructure—not just as a commercial network extension—ensuring cost allocation models do not disadvantage early movers or smaller proponents. The resource sector should be represented in any energy planning to reflect the role as a major, energy-intensive user and to identify emerging demand early.
- Enable modular and off-grid solutions - facilitate investment in flexible systems (including firming renewables, gas, and storage) for mines and explorers that are not immediately serviced by major transmission infrastructure.
- Improve access for smaller users - develop connection pathways and funding mechanisms that reduce barriers for small and mid-scale projects, including shared infrastructure models and coordinated connection points.
- Explore the feasibility of sourcing gas from the developing gas basins of Betaloo and South Nicholson close to the NWMP.

Key Enabler 3 – Rail and road infrastructure

CHALLENGES

The NWMP is served by a single 1,000 km Mount Isa to Townsville rail line (including a branch to Phosphate Hill) and a handful of key regional highways. This corridor is the sole heavy freight link from the NWMP to the Port of Townsville, where most of the region's minerals are exported. Remoteness and limited alternative routes mean any shortcomings in transport links have wide impacts on businesses and communities in the region.

The Mount Isa Line's capacity and cost structure are ongoing concerns for industry today and in the future. The single narrow-gauge line has restricted throughput and is heavily impacted by natural disasters. The line is mostly single-track with passing loops which limit train frequency and speed. Currently the line cannot accommodate double-stacked containers without significant upgrades. Historically below-rail access charges have been high, making rail freight costly for mining products. As a result, many producers rely on road transport despite its inefficiencies. Small to mid-tier explorers and developers face volume threshold barriers to using the rail network. So called "take-or-pay" contracts and lack of common user loading facilities in Mount Isa and at the Port of Townsville can effectively price out or deter new entrants. The Queensland Government has acknowledged these barriers to entry for small and medium-sized critical mineral producers in the NWMP and is seeking ways to make rail more accessible and competitive. However, until these issues are resolved, prospective mines will struggle to secure viable logistics, and existing producers may resort to road haulage that adds cost and externalities.

Due to the rail constraints, the NWMP's road infrastructure is under strain from heavy freight use and inadequate standards in some sections. Key highways like the Flinders and Barkly Highways form the backbone of road transport in the region. But, increasing volumes of triple road trains carrying ore, concentrates, and supplies are accelerating wear and tear on these roads. Some critical routes remain effectively single-lane sealed roads requiring heavy trucks to pull off onto shoulders to pass each other. This not only slows freight movement but also creates serious safety hazards for industry employees and locals alike.

The NWMP's transport links are inherently vulnerable to disruptions, given the region's annual weather patterns and single-corridor dependence. The Mount Isa Line and connecting highways have suffered periodic closures from flooding and extreme weather, which can isolate mines and communities for weeks. The NWMP experiences intense seasonal rainfall that can submerge or wash out roads and rail embankments. This was seen in early 2026 when monsoonal floods closed the Mount Isa rail line for over a month. During that event, mining operations had to re-route freight via long road detours and even establish temporary loading facilities at Hughenden to tranship concentrate by road. Such disruptions jeopardise delivery schedules, inflate costs, and tie up working capital (e.g. in mine-site stockpiles) while transport links are down. The absence of alternate routes or redundancy means a single point of failure can significantly impact the entire NWMP.

Fully realising the NWMP's potential requires addressing how transport infrastructure is managed and accessed. Separate approvals and funding processes for rail and road can result in fragmented upgrades rather than a coordinated corridor plan. Without a coordinated clear, long-term plan and multi-party engagement, expansions in one part (e.g. port or rail upgrades) may lag behind needs in another (e.g. connecting road capacity), creating bottlenecks. Companies often lack the scale to finance dedicated infrastructure, meaning government action, intervention, and investment in the development of common-user solutions is essential.

PROPOSED DIRECTION

Unlocking the NWMP's full economic potential requires an integrated, corridor-level response to rail and road constraints, from all levels of government in partnership with industry. The overarching goal is a modern, resilient freight network which offers reliable, cost-effective access from mine gate to port for all proponents of all sizes.

Key directions for government action include:

- Invest in rail and road corridor capacity and resilience

Accelerate critical upgrades on the Mount Isa–Townsville corridor to expand capacity, improve running time reliability and frequency, along with natural disaster resilience. On the rail line this includes targeted improvements such as additional passing loops, track and bridge upgrades to support heavier and more frequent trains, and explore clearance enhancements for double-stacked freight where feasible. Prioritise flood resilience works along vulnerable sections (e.g. raised embankments, improved drainage and culvert renewal) to reduce outage risk during wet seasons.

On the road network, required work includes the continued widening and sealing projects on key routes to ensure safe, all-weather connectivity for heavy vehicles. Maintenance funding also needs to increase for NW regional roads to keep pace with rising freight volumes and mitigate deterioration, thereby guaranteeing year-round access for both communities and industry.

- Improve freight cost competitiveness and access

Ensure NWMP transport options are affordable and accessible, especially for new and smaller projects. Extend and refine support measures such as the Mount Isa Line freight subsidy, which currently provides a 10% reduction in below-rail access charges to encourage more minerals onto rail. This reduces supply chain costs for industry and incentivises a shift from road haulage to rail, delivering additional public benefits in road safety and reduced road maintenance.

Explore long-term tariff reform or open-access arrangements for the corridor to keep freight rates internationally competitive. Lowering these barriers will allow emerging critical mineral producers to utilise rail earlier and more effectively.

Develop multi-user loading facilities and intermodal hubs at strategic locations (e.g. Cloncurry, Hughenden) so smaller shipments can be aggregated, improving economies of scale for rail transport. This common-user infrastructure approach is vital to give explorers and junior miners cost-effective pathways to get their product to market, rather than each needing to build bespoke transport links.

- Integrated corridor planning and co-investment

Adopt a holistic, multi-agency approach to planning and funding NWMP transport infrastructure. Establish a dedicated corridor taskforce or working group involving all levels of government and industry stakeholders to align priorities across rail, road and port investments. A near-term focus should be the Townsville Eastern Access Rail Corridor (TEARC) – an 8.3 km new freight line to bypass urban Townsville and connect directly into the port. Fast-tracking TEARC (with Queensland and Commonwealth support) will remove a bottleneck at Townsville by eliminating the need for freight trains to transit the congested urban network, thereby shortening transit times and expanding port throughput for NWMP exports.

Similarly, coordinate state and federal funding streams to address critical road gaps and last-mile links in mining areas. This includes not only large-scale projects but also common-user roads and rail spurs to open up new resource provinces, delivered via co-investment models

(industry and government cost-sharing) where appropriate. Align these transport initiatives with broader regional development plans, ensuring synergies with energy (e.g. power for rail operations), water and land use planning so that infrastructure development supports sustainable community growth and investor confidence.

By pursuing these directions, the Queensland Government can transform the NWMP's transport framework from a bottleneck into an enabler of growth. Strengthening this corridor will improve export competitiveness, lower operating costs and risks for industry, and deliver wider social benefits by improving safety and connectivity in the North West. In partnership with industry and the Commonwealth, a sustained focus on rail and road infrastructure will underpin the NWMP's next phase of development, unlocking new mines, extending the life of existing operations and ensuring that regional communities share in the benefits of a thriving critical minerals sector.

Key Enabler 4 – Workforce attraction and retention

CHALLENGES

The NWMP is characterised by remoteness, thin local labour pools and strong competition for skilled workers from other regions and industries. Workforce attraction and retention challenges in the area are structurally different from those in more connected resource regions. It is well recognised workforce availability is a key enabler for investment, project delivery and long-term regional development. It is not an operational issue for individual companies alone but one that is shared by all levels of government and communities.

Workforce attraction challenges in the NWMP are intensified by broader demographic and lifestyle trends. The province is competing for workers against larger regional centres and coastal population hubs where access to services, education, healthcare, housing choice, recreation and family support networks are generally greater. Regional isolation represents a structural workforce challenge for Mount Isa and Cloncurry that cannot be addressed through wages alone. As younger generations increasingly prioritise lifestyle, flexibility, career mobility and family wellbeing alongside remuneration, attracting workers and encouraging long-term settlement in remote communities is becoming increasingly more difficult.

Around 57 percent of the north west resource workforce whose place of residence is known live outside the local government area in which they work, reflecting the region's ongoing reliance on FIFO and DIDO arrangements and the challenges of converting short-term workers into long-term residents¹.

Regional liveability constraints

Limited housing availability, pressure on health and education services, childcare access and social infrastructure all reduce the willingness of workers and their families to relocate or remain in the region. Local governments often lack the scale and revenue base to address these

¹ <https://www.qgso.qld.gov.au/issues/13246/north-west-region-resource-industry-workforce-2023.pdf>

challenges independently. The consequence is increased reliance on fly-in-fly-out (FIFO) and short-term workforce models, which can impact retention, costs and limit long-term community stability.

Limited access to training and job ready pathways

Workforce shortages are exacerbated by weaker access to education and training pathways compared to metropolitan and coastal regions. Travel requirements, inflexible delivery models, funding arrangements not designed for small cohorts, and insufficient TAFE assessor availability combine to reduce participation and completion rates. In some cases, delays in final assessments can extend apprenticeship completion by up to six months, creating workforce planning pressures for mine sites and uncertainty for apprentices seeking to progress into permanent roles, relocate, or plan their next career steps. This particularly affects early career entrants, vocational pathways and progression into specialist and statutory roles, narrowing the future workforce pipeline.

Insufficient domestic labour supply

Domestic labour supply alone does not meet workforce demand in the north west. Adequate supply is further constrained by competition from major infrastructure projects and population concentration in southeast Queensland and this is expected to worsen as construction for the Olympic Games advances. Without complementary skilled migration pathways, workforce gaps will persist despite high wages and incentives.

Statutory roles as a workforce risk

Statutory positions in roles such as Underground Mine Manager and Ventilation Officer are consistently identified as a critical vulnerability in remote operations. High personal liability, extensive competency requirements and limited access to training opportunities deter uptake, particularly among younger professionals. Replacement pools are thin, making turnover and burnout high risk issues for all resources regions including the NWMP. New competency requirements for statutory roles such as Mechanical Engineering Manager and Electrical Engineering Manager further compound this issue.

PROPOSED DIRECTION

Improved regional liveability

Boosting housing supply, health, education, childcare, and community infrastructure helps retain workers and attract families to regions.

To address liveability challenges in the NWMP, government should consider:

- Support common-user social infrastructure to improve workforce attraction and settlement across the community

Historically, workforce accommodation solutions have often been delivered on a project-by-project basis, resulting in duplicated infrastructure and limited community benefit. A more efficient model would facilitate co-investment in shared social infrastructure that supports multiple operations and communities simultaneously.

Support partnerships between industry, local government and the State Government to co-invest in common-user social infrastructure located near workforce accommodation areas in town. Under this model, individual companies may provide separate housing and accommodation while shared facilities such as recreation centres, community pools, sporting facilities, gyms, and hospitality venues are jointly funded and accessible to workers, families and local communities. User-pays mechanisms and shared operating models could help improve long-term commercial viability while reducing the upfront capital burden on individual proponents. This approach could improve workforce attraction and

retention outcomes, enhance regional liveability, reduce infrastructure duplication and create enduring community assets that remain valuable beyond the life of individual projects.

- Government and industry partnership in housing delivery

Housing delivery in the NWMP should be approached as a shared regional liveability challenge, not solely as an individual project cost. A sustainable model would see the State and Federal Governments, local governments and industry work together to deliver housing through shared-cost arrangements, including government contributions to enabling infrastructure, land release, servicing costs and affordable housing. This should support both resource workforces and the non-resource workforces needed to sustain liveable towns, including health, education, childcare, retail, hospitality and community services. Under this model, industry could contribute to project-related workforce housing while governments help address broader market failures and affordability pressures that affect the whole community. Housing solutions could include townhouses or other higher-density housing options that provide suitable accommodation for workers and families, make efficient use of land under local planning schemes, and create a more attractive option for workers considering long-term relocation to the region.

Skilled migration aligned to regional needs

Targeted skilled migration, along with easier qualification recognition and settlement support, helps regions like the NWMP fill essential workforce gaps and strengthens long-term stability.

To improve the effectiveness of the skilled migration system, in collaboration with the Federal Government the state government should:

- Streamline migration pathways for regional and sector-specific needs –mining engineers, geologists, metallurgists, electricians, fitters, diesel mechanics, drillers, and surveyors.
- Accelerate the recognition of qualifications and support recognised bridging programs across engineering, surveying and identified trades.
- Develop policies that promote regional settlement and retention beyond initial entry.

Reform of statutory role pathways

Statutory position holders are critical to safe and effective mine operations. Addressing statutory workforce shortages requires action across the entire pipeline and is critical to ensuring statutory capability is available to support current and future operations in the NWMP.

Government and industry should continue to partner to:

- Build attraction, retention and leadership pathways for statutory roles
- Improve access to statutory training and assessment in remote regions
- Review regulatory, administrative and operational barriers to participation

Key Enabler 5 – Water security and planning

CHALLENGES

Regional groundwater assessments for the Julia Creek/Richmond and Croydon Critical Mineral Zones (CMZs) confirm water availability for critical minerals is not constrained by a lack of groundwater resources. The constraint is planning frameworks relying on static allocation rules and incomplete regional data. Current water plans and entitlement frameworks were designed primarily for dispersed agricultural and pastoral use and do not adequately account for clustered, strategic industrial demand in areas where hydrogeological risk varies significantly by location and aquifer.

Across both CMZs, the dominant water sources are Great Artesian Basin (GAB) aquifers and riverbed and old buried river channel systems that refill from time to time. While basin-scale recharge remains substantial, groundwater balance assessments indicate ongoing net storage declines due to rejected recharge, outflows to springs and the Gulf of Carpentaria, historic uncontrolled artesian bores, and climate variability. At the same time, monitoring data are sparse, limiting confidence in cumulative impact assessments and often resulting in conservative regulatory outcomes.

Existing regulatory triggers focus on fixed volumetric limits, rather than adaptive management tied to measured outcomes such as drawdown, aquifer pressure, spring flow response or groundwater-dependent ecosystems (GDEs). This creates difficulty in progressing projects where localised impacts can be demonstrably managed within established thresholds (for example, <5 m drawdown to existing users and <0.4 m cumulative drawdown to springs), but uncertainty remains at a regional scale.

The assessments also show a structural inefficiency in the current framework. Significant volumes of groundwater are effectively lost to the system through uncontrolled bores, rejected recharge, or submarine discharge, while new projects face barriers to accessing water - even where substitution or water savings could result in net environmental benefit. In addition, mine dewatering volumes, particularly relevant for graphite projects in Croydon, are treated primarily as a compliance issue rather than as a managed water resource that could offset new extraction.

Finally, while cultural values and spring systems are recognised in water plans, early integration of cumulative cultural water considerations remains inconsistent. This increases approval risk and places pressure on later-stage regulatory processes.

PROPOSED DIRECTION

- Transition to adaptive, outcomes based groundwater management
- Shift planning and entitlement decision-making toward trigger-based frameworks that link access to measured aquifer performance (pressure, drawdown, spring response) rather than

static volumetric limits, while retaining existing protections for springs, GDEs and other users

- Enable low risk water supply by prioritising substitution and water savings

Strengthen mechanisms under existing water plans to facilitate bore capping and piping, entitlement relocation, managed re use of mine dewatering, and access to groundwater otherwise lost to discharge, where this demonstrably improves net environmental outcomes

- Establish Coordinated CMZ scale monitoring and cumulative impact oversight

Support government-led, regionally coordinated groundwater and spring monitoring in CMZs (supported by industry), to improve data confidence, streamline approvals, protect cultural and environmental values, and reduce duplication across individual projects.

CONCLUSION

The North West Minerals Province represents one of Queensland's most significant economic development opportunities. With a strong foundation of existing operations, world-class copper and critical minerals endowment, established processing infrastructure and a growing pipeline of development projects, the region has the potential to drive investment, employment, regional growth and export value for decades to come.

At the same time, the NWMP is entering a period of economic transition. The cessation of Glencore's underground copper mining operations, uncertainty surrounding the long-term future of the Mount Isa smelter and refinery, and the need to secure the region's next generation of resource investment have reinforced the importance of attracting new projects and industries to sustain North West Queensland's economy.

Realising this opportunity will not occur by resource potential alone. The next phase of development in the NWMP will depend on addressing a series of interconnected structural challenges that currently constrain investment, increase costs and reduce Queensland's competitiveness as a destination for global capital.

This strategy identifies five critical enablers that will determine the pace and scale of future development: speed to market, affordable and reliable energy, efficient transport infrastructure, workforce attraction and retention, and water security. While these challenges manifest differently across projects and commodities, they share a common characteristic. They are regional and systemic in nature and cannot be effectively addressed by individual proponents acting alone. Coordinated planning, enabling infrastructure, regulatory efficiency and long-term policy certainty are required to unlock investment across the province and support the successful economic transition of Mount Isa and the broader North West.

The solutions outlined in this strategy reflect priorities consistently identified by industry and are intended to support government consideration of practical, targeted actions, interventions, and investments. These include coordinated development frameworks, common-user infrastructure models, improved infrastructure planning and access arrangements, regional workforce initiatives, and modernised approaches to water planning and management. Together, these actions would reduce barriers to development, improve investor confidence, lower costs and enable a more competitive operating environment across the NWMP.

The opportunity extends well beyond North West Queensland. Successful development of the NWMP would strengthen Queensland's position as a leading supplier of copper, critical minerals and associated processed products at a time of growing global demand. It would support regional population growth, create skilled employment opportunities, strengthen domestic supply chains, generate export earnings and royalty revenues, and help secure the long-term future of strategically important infrastructure and industrial assets across the state, including the Mount Isa smelter and associated processing network. Importantly, it would build on Queensland's legacy as a global resources leader while supporting the next generation of resource development.

The NWMP is entering a decisive period. The decisions made over the next decade will determine whether Queensland fully realises the value of this globally significant minerals province or risks leaving a substantial economic opportunity undeveloped. Through genuine partnership between industry, government and regional communities, Queensland can transform the NWMP from a region constrained by infrastructure, workforce and policy challenges into a globally competitive resource province that underpins long-term prosperity for Mount Isa, the North West and the State as a whole.

QRC North West Mineral Province Strategy

Call to Government to develop a coordinated development framework for the region

Key Enablers	Speed to Market	Improved Exploration	Energy affordability & access	Rail & road infrastructure	Workforce attraction & retention	Water security & planning
Industry proposed solutions	Develop a coordinated approval framework for the region led by the Coordinator General with a Cross Agency Assessment Team including DNRM & DETSI.	- Enhance targeted co-funding and incentive programs to leverage investment capital - Expand pre-competitive geoscience initiatives to de-risk exploration in covered regions of the NWMP	- Provide transparent timelines and pricing for the NWPS and CopperString - Support firm and dispatchable supply - Enable modular and off-grid solutions - Improve access for smaller users	- Accelerate upgrades on the Mt Isa-Townsville rail corridor to improve reliability - Increase maintenance funding for NW regional roads - Extend the Mt Isa Line freight subsidy - Develop multi-user loading facilities and intermodal hubs	- Support common-user social infrastructure to improve attraction and settlement - Streamline migration pathways for regional and sector-specific needs - Strengthen participation in statutory pathways	- Shift planning and entitlement decisions toward trigger- based frameworks - Enable low risk water supply by prioritising substitution and water savings - Establish coordinated monitoring and cumulative impact oversight to reduce duplication
Key stakeholders	DNRM, QIC	DNRM, QIC	DNRM, QIC	DNRM, DTMR, NAIF	DTET, RSHQ	DETSI, DNRM