China is winning the war for the future.

written by Jack Lifton | September 8, 2021

The perennial key geopolitical and geoeconomics issues of the conflict among nation-states over the allocation of scarce critical natural resources have, in the last 25 years, been dramatically affected by the current wave of the globalization of the ownership and of the productive output of natural resources, primarily in Africa and South America. Contemporary globalization has worked very much in the favor of the Peoples' Republic of China (PRC). China's goal of self-sufficiency in all natural resources, technologies, and industrial manufacturing for the stated purpose of achieving total independence from the rest of the world is well on its way to success.

China has combined a coherent industrial policy, based on the above stated goal, and has given that policy a driver with what it calls "capitalism with Chinese characteristics," which turns out to be not profit-centered but national goal-centered capitalism.

One result of Chinese goal-centered capitalism has been the decline of North America's and Western Europe's dominance as the industrial manufacturing and technological innovation centers of the world. The very same Chinese consumer market for manufactured goods that caused a boom for Western OEMs has been redirected to favor Chinese domestic OEMs to move China into its new era of the policy of dual circulation, the gradual substitution of domestic consumption for export markets.

Western politicians are frantic to keep their consumer products' boom going, so they are paying lip service to the notion of a consumer oriented free-market economy based on profit while more

and more (disastrously) trying to manipulate that same consumer market demand without any real understanding of supply economics.

The best example of the failure of the Western approach is the looming and unnecessary energy poverty creating a political theme of an amorphous danger (aka as “boogeyman”) called climate change, a “crisis” being used to attempt to manipulate consumer demand through concepts called “clean energy” and the “Green Economy.”

Nowhere is there a better example of this than the current political mania for the electrification of transportation power trains. Self-described “experts” and “analysts” confidently predict the market penetration of so-called EVs, electric vehicles, over the next decade and well beyond. But these predictions fail miserably when analyzed through the prism of what is known about the existence, accessibility, volumes, and economics of deposits of the critical technology metals that would need to be present for such predictions to be viable. Further analysis of the current production, distribution and use of electricity is necessary.

Ninety nine percent of the world’s transportation runs on oil based fuels, the distribution of which is in effect universal. The same cannot be said for electricity.

The recent breathless coverage of weather “extreme” events, drought in California, hurricane in Louisiana, and flooding in New York and New Jersy have two things in common; one is that they are blamed on “climate change”; and a second thing, that no one in journalism seems to have noticed, that all of, and each of, these events have dramatically reduced or eliminated the flow of electricity to consumers in the affected regions, not just by generation reduction but primarily by disrupting the

distribution of reliable electricity.

Imagine, for a moment, that you are a perceptive observer of the U.S. electrical energy production industry and of its distribution industry. (Note, you therefore couldn't and wouldn't be a mainstream media journalist). How would "greened" emergency services, for example, be able to fulfill their charge (excuse the pun) without reliable continuous electric energy production? The answer is that they will rely and always must rely on fossil fueled vehicles and localized electric generators.

Now further imagine that such fuels and vehicles have been made extraordinarily expensive due to the increased costs (due to supply reduction following forced demand reduction) of fossil fuels, storage batteries, and the need for reliable backup power generation.

The legacy power distribution systems of America and Europe cannot even today cope with extreme weather events and government paid emergency services can only function with off-the-grid power sources. China has a lesser problem, because its electric power generation and distribution are being built on a national scale with exactly the problem, the interruption of power distribution, I am describing being considered and taken into account by China's industrial policy execution bureaucracy.

How would (will) a California city, such as Los Angeles, function in a heat wave/drought when the choice is between air conditioning or charging your electric car? The famous "Valley" society of the Los Angeles complex grew originally after World War II with "all electric homes."

How will steel, aluminum, and copper be mined, refined, and fabricated without baseload, continuous and reliable, electric

power to sustain the enormous continuous drains of power that batteries cannot sustain? Such flows cannot be created or sustained by solar panels and wind turbines.

And note that without a steady increase in the production of copper, which is refined ELECTROchemically and melted in electric furnaces, there can be no clean or green energy transformation. And that there can be no production of the companion metals upon which our electronics depend without massive production of the base, structural metals, within which they occur in tiny quantities. So, paradoxically and ironically, mining will have to increase manyfold and baseload fossil and nuclear electric generation would have to be increased dramatically to sustain the flow of scarce technology metals for the "greening" of society.

There is, of course, an alternative. Electricity for air conditioning, lighting, and transportation can be allocated by privilege, I.e., economic class. The wealthy and their servants will have all that they need and the rest will simply exist in a dry, hot world of water and food rationing. Politicians by the way will rate as "servants" of the wealthy. That must be what the Western politicians think, because that is the world they are creating.

The real question is: Will the climate change "crisis" collapse the fragile democracies of the West before anyone comes to their senses outside of China. Note that China already has secured sufficient supplies of all the metals it needs to avoid the supply crisis now barreling down on the West.