# The Carnival of the Critical Mineral Experts

written by Jack Lifton | June 23, 2025

When the Chinese Communist Party (CCP) decided in the 1990s that China should embark on a program to catch up with the West in manufacturing and technological development capability, it set out an industrial policy to support the building of those capabilities independent of Western economic capacities or market conditions. The purpose of this policy was to coordinate a "modernization" of China with the development of an independent and secure self sufficiency in the natural resources that would underpin manufacturing and secure Chinese independence from global resource markets, which it saw as controlled and manipulated by capitalist forces inimical to China's economic and political goals.

This purposeful and national approach to access to the global minerals critical for the development and maintenance of a world-leading technological society has created an asymmetrical and global predominance in the sourcing, processing, and fabrication of critical minerals by China.

China's emphasis on capability and capacity has been largely achieved by ignoring the pricing of the minerals. This policy is fed with capital gained from the exports produced by developing the world's largest consumer goods manufacturing base, which openly required massive inflows of critical technology minerals and the domestic construction of the downstream supply chains to process these minerals into end-user forms for manufacturing.

Western mining and processing firms were entirely in line with China's policy execution as it provided enormous profits for them.

Western politicians have mostly entirely ignored the geopolitical aspects of non-fuel mineral sourcing and downstream supply chain dominance by the Chinese until now, when they are feebly and in an uncoordinated way attempting to propel a renaissance of critical minerals-based technology manufacturing with poorly thought-out, and randomly and politically based financing without regard to the need for skilled and experienced personnel and managers to do it. China has focused directly on supporting its industrial policy by building and operating a STEM-focused educational system, while the West has focused on individual capital accumulation without regard to national welfare or security.

I have been trying to figure out why so many “experts” clearly do not understand what the Chinese have purposely done, and since they don’t know anything technical about the critical minerals that are the subjects of their dramatic predictions of gloom if our nation doesn’t have unimpeded access to them, I don’t understand why anyone pays any attention to them.

The question is: What range of education and experience is required to become an “expert” in critical materials sourcing, *applications, and necessity in a defined economy (such as that of the United States).*

Traditional journalism is certainly not equipped to hold its practitioners as experts in technologies. This deficit was, in the past, ameliorated by the selection of “experts” in the required fields for commentary on the issues requiring such expertise. Such outside experts were typically academics, since journalists did not know how to ferret out industrial manufacturing supply chain operations specialists or even understand that they needed to look at a bigger picture than academics could provide.

In 1917, the United States assumed an asymmetrical predominance over the world's finances, a position it has maintained to this day. This ended the era of global Great Power rivalry among the European "empires." This accretion of financial power to the United States, although welcome by the Wilson administration, was not achieved purposely as a condition of the entry of the United States into World War I on the side of the Entente.

But the financial power of the United States in the post war (WWI) period did not prevent Europe from sliding into the final phase of the collapse of its global influence, aka World War II. That conflict bankrupted Great Britain and its imperial influence simply collapsed in the generation following that conflict as did that of the lesser European empire of France.

The analogy I am drawing is that the United States did not intend to become the world's pre-eminent financial and military power. It happened because of poor planning and absolute ignorance of the foreseeable consequences of their self-destructive actions by the former European "empires" at the same time as the United States was undergoing a productivity and wealth creation period, contained within its own borders, then unparalleled in human history. The U.S. had surpassed Great Britain in GDP by 1875. In 1916 its Federal Budget was in surplus, and in 1917, President Wilson ordered the construction of a naval fleet, the cost of which was as much as that of the Royal Navy's entire World War I expenditure.

My point here is that I do not believe that China set out in the late twentieth century to dominate global non-fuel natural resource production and utilization as a policy. But American greed, lack of national purpose, and bureaucratic blindness led to this result. China, today, is attempting to use its dominant position in critical non-fuel natural resources for political purposes. Still, American leadership is waking up to the problem

and is resisting the creation of a world in which China controls the flows of non-fuel natural resources.

It is too late for America or Europe to regain global trading dominance in natural resources not contained within their own borders. But until and unless the global south shuts down the trade in any uniquely territorially confined natural resources they might possess, Europe may be able to achieve at least a regional self-sufficiency in critical technology minerals and their processing into end-user forms for manufacturing. America is much better off than Europe. Its natural borders contain almost all of the necessary critical technology metals its society needs, and America still retains the bones of the downstream industries necessary for the conversion of those resources into end-user forms for its manufacturing base.

If Americans have the will and the patriotism, and its industrialists can suppress their greed and regain control of their industry from the pure financializers, America will regain self-sufficiency in the sourcing and use of critical technology metals. However, never again will America dominate the global supply of any such materials.