

# The Navajo Nation shows the mining industry how 'Hozro' is the only path forward.

written by Melissa (Mel) Sanderson | December 28, 2022

There is a word in the Navajo language, in English written as: "hozro." This one word encapsulates an important philosophy for the Navajo people, as it translates to mean putting oneself in harmony with one's surroundings. "Hozro" has helped the Navajo, one of the largest Tribes in the US, to coexist more harmoniously than many other Tribes with the dominant White culture. The Navajo reservation is the largest in the US and hosts many natural resources essential to the economic development of the country.

These resources have not always been developed either harmoniously, respectfully or conscientiously by companies. Uranium mining on the Navajo reservation remains a disgraceful episode in US history, with radioactive contamination of essential water sources and soil and associated human sickness and death still a reality, not a memory, for many Navajo families. As a consequence, many Navajo are adamantly opposed to new uranium mining anywhere on or near the reservation.

**Despite this, coal mining has a much more successful history with the Navajo.** Until 2019, when the Navajo Generating Plant closed, many Navajo worked both at the coal mine feeding the Plant and in the Plant itself for 45 years. The Navajo Nation initially attempted to purchase just the coal mine, but then pivoted to a much more ambitious vision, establishing the Navajo Transitional Energy Company (NTEC). NTEC's website states its mission is: to be a reliable, safe producer of coal, while diversifying the Navajo Nation's energy resources to create

economic sustainability for the Nation and the Navajo People. One visible effort by the company is the large solar panel array near Kayenta on the reservation.

Less visible efforts include building a mining portfolio, until recently heavily focused on coal. NTEC owns and operates the Antelope and Cordero Rojo coal mines in Wyoming, Spring Creek in Montana, and Navajo Mine in New Mexico (the latter located on the reservation). Utilizing its multi-generational mining expertise, NTEC has built a sound operational foundation and increasingly is being recognized for its efforts. In November of this year, the National Mining Association, in conjunction with the Department of the Interior's Office of Surface Mining Reclamation and Enforcement recognized NTEC with two awards, for Mine Safety and for Stewardship of National Resources through Reclamation.

But while building on its strengths NTEC also kept an eye on its mission to develop sustainable energy sources. In 2019 NTEC took an investment position in both [Texas Mineral Resources Corp.](#) (OTCQB: TMRC) and its USA Rare Earth project in Round Top Texas. More recently, NTEC has entered a more active partnership with Arizona Lithium Limited (ASX: AZL | OTCQB: AZLAF) to develop the Big Sandy lithium project near Wikieup, Arizona. This latest agreement may pose potential difficulties for NTEC, however.

NTEC's December 5 [announcement](#) of the strategic alliance states that "NTEC has committed to lead the operational development of Big Sandy, which will include everything from Bureau of Land Management (BLM) project permitting, mine design, drilling environmental assessments, and construction and contract mining operations. The agreement provides for AZL and NTEC to commence work towards development of the Big Sandy project while at the same time continuing due diligence and negotiation of a definitive agreement."

The announcement goes on to say that when NTEC meets certain mining development milestones with respect to Big Sandy, it (NTEC) will receive remuneration in cash or AZL shares and options to purchase additional ordinary shares. Importantly, the announcement notes that “NTEC understands the cultural significance of the land near the mining site. The company plans to work with the Navajo Nation and other Indian Nations to ensure the development at Big Sandy prioritizes appropriate cultural and environmental safeguards throughout the process.”

This latter statement appears to be a reference to the opposition of the Hualapai Nation to the Big Sandy project, which abuts the Hualapai lands in one area but does not lie within the Hualapai reservation. A December 15 interview on KNAU News Talk noted that “In April of 2021, the Hualapai Tribal Council passed a resolution strongly objecting to the proposed mining claim area, citing devastating impacts to significant cultural and spiritual resources.” Likewise, the Environmental Justice Atlas registers the Hualapai opposition, with the Hualapai claiming that exploratory drilling has affected a sacred spring on their land. According to the Atlas, the project also faces opposition from some residents of nearby Wikieup, Arizona.

It would appear that the Navajo, as part of the strategic agreement with AZL, may be about to become entangled in trying to resolve a pre-existing conflict between AZL and the Hualapai. If so, this could pose problems for not only the two Tribes but also BLM and the broader Department of the Interior, whose permitting processes require it to take into account objections from Native peoples to mining projects. BLM also is supposed to give priority to critical materials projects, including lithium, which is essential to the development of the electric vehicle industry, a growing component of the Arizona economy.

Kudos to the Navajo Nation for focusing on cooperation instead of conflict, and for taking the standard model of indigenous involvement in mining to new and more lucrative levels. In this particular case, let us see if “hozro” can prevail.

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# **Pini Althaus on USA Rare Earth's \$50M Series C Funding to acquire rare earths and lithium project in Texas**

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In a recent InvestorIntel interview, Jack Lifton speaks with Pini Althaus, CEO and Director of [USA Rare Earth, LLC](#) about USA Rare Earth's progress towards production at its Round Top heavy rare earths, lithium and critical minerals project in Texas.

In this InvestorIntel interview, which may also be viewed on YouTube ([click here to subscribe to the InvestorIntel Channel](#)), Jack pointed out that the markets for lithium and rare earths are entering a bull market because of the lack of supply to satisfy demand. Pini went on to say that with the ever-increasing demand for rare earths in the US, “USA Rare Earths is in discussion with a number of companies around the world to source feedstock to separate rare earths and then provide those materials into the US supply chain.” USA Rare Earth recently exercised options to acquire 80% of Round Top Project and completed [Series C Funding round of \\$50 million](#) making it fully funded through the completion of the Definitive Feasibility

Study. The company expects to produce separated materials at the demonstration plant at its Round Top Project later this year leading to full-scale commercial production in 2023.

To watch the full interview, [click here](#)

### **About USA Rare Earth, LLC**

USA Rare Earth, LLC owns an 80% operating joint venture interest in the Round Top Heavy Rare Earth and Critical Minerals Project located in Hudspeth County, West Texas. Round Top hosts a wide range of critical heavy rare earth elements, high-tech metals, including lithium, gallium, zirconium, hafnium and beryllium. Based on the Preliminary Economic Assessment (dated August 16, 2019) projects a pre-tax net present value using a 10% discount rate of \$1.56 billion based on a 20-year mine plan that is only 13% of the identified measured, indicated and inferred resources. The PEA estimates an internal rate of return of 70% and average annual net revenues of \$395 million a year after average royalties of \$26 million a year payable to the State of Texas. Based on the cost estimates set forth in the PEA, Round Top would be one of the lowest-cost rare earth producers, and one of the lowest cost lithium producers in the world. The Round Top Deposit hosts 16 of the 17 rare earth elements, plus other high-value tech minerals (including lithium), including 13 of the 35 minerals deemed “critical” by the Department of the Interior and contains critical elements required by the United States, both for national defense and industry. Round Top is well located to serve the US internal demand. In excess of 60% of materials at Round Top are expected to be used directly in green or renewable energy technologies. In 2020 USA Rare Earth opened a rare earth and critical minerals processing facility in Wheat Ridge, Colorado and in April 2020 USA Rare Earth acquired the neodymium iron boron (NdFeB) permanent magnet manufacturing system formerly owned and operated in North Carolina by Hitachi

Metals America, Ltd.

To know more about USA Rare Earth, LLC [click here](#)

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If you have any questions surrounding the content of this interview, please email [info@investorintel.com](mailto:info@investorintel.com).

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# Jack Lifton, Peter Clausi with Pini Althaus on the need for collaboration in the rare earths market

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The Technology Metals Show hosts Jack Lifton and Peter Clausi talk to Pini Althaus, CEO and Director of [USA Rare Earth, LLC](#) about the challenges in the North American rare earths supply chain and the need for collaboration in the industry.

In this promo clip from the full interview available exclusively to [subscribers](#) of the [Technology Metals Show](#), the panel discusses the Round Top Heavy Rare Earth and Critical Minerals Project in which USA Rare Earth has an option to earn and acquire an 80% interest from Texas Mineral Resources Corp. (OTCQB: TMRC). Pini discussed that the Round Top Deposit hosts 16 of the 17 rare earths with a high concentration of heavy rare earths, plus a significant amount of lithium. “We are projected to be the second-largest lithium producer in the US,” He said.

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thought leaders and investors focused on issues relating to sustainability in the critical materials sector.

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## **TMRC's Chairman Anthony Marchese on what the US-China Trade Agreement means to the US Rare Earths Market**

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"If you look at the specifics of the trade agreement (US-China Phase One Deal), the way they have listed is, all of the rare earths including scandium and yttrium because a lot of people don't consider especially yttrium a rare earth. So it is all of the rare earths and scandium and yttrium and any of the alloys. It is true that the United States currently has zero manufacturing capacity...I look at it as another potential market for our products when we get into production. Remember this is phase 1. There is going to be phase 2 and hopefully phase 3. They are committed to buying it once we get into production. We will be able to sell 100% of our goods to the American market. China then becomes a secondary market for some of our products. It gives acknowledgment to the fact that we have a potential supply chain resurgence in the United States." States Anthony Marchese, Chairman of [Texas Mineral Resources Corp.](#) (OTCQB:



TMRC), in an interview with InvestorIntel's Tracy Weslosky.

Anthony went on to say that Texas Mineral Resources is developing the Round Top Heavy Rare Earth and Critical Minerals Project in Texas with its funding and development partner, USA Rare Earth LLC. The Round Top Project has the optimal infrastructure to move materials to other parts of the country as it is very close to Interstate Highway 10 and a major railroad. The project is located on State property and not on Federal property which is a huge advantage for the company. Anthony also said that the Round Top project will provide a balanced and diversified revenue stream as a third of the output will be rare earths, another third will be critical materials like scandium and lithium and remaining will be industrial minerals.

To access the complete interview, [click here](#)