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## **Better-Management Newsletter 3 February**

**The Twin Tower trigger.... and the horrors it triggered. The error of America's ways. But BRICS and the SCO grow stronger. A financial meltdown?? Natural Gas in the USA. Oil trend - up or down? Bitcoin currency - what next? Zenn – a turning point? What is happening in Russia?**

### **Fortress America**

I remember the feeling to fear that gripped my stomach as I watched the twin towers come down, one after the other, at just after 1pm GMT from my office TV in London. My management team and I realised a couple of thousand innocent people had just died but my fear was for the disproportionate reaction that would come from the US military. That reaction is still reverberating around the world today. It has spawned ISIL and many terror groups. It has resulted in millions being rendered homeless, hundreds of thousands dead and refugee problems that have turned the Middle East into a powder keg of incalculable size.

I subsequently recalled in the run-up to the Iraq invasion of 2003; deliberately asking my sixteen closest friends and family who lived and voted in the UK what they thought of the blatant and obvious lies about Iraq coming from their leaders – surely they could prevent the UK going to war? This simple random sample of 16 middle class Poms all had the same reactions:

1. Yes we know it is bunkum and it is wrong; and
2. There is not a blind thing we can do about it, Blair will do what Blair will do.

### **The error of America's ways**

America has never realised the error of its ways. Not for Iraq and not for Vietnam. Just as the Americans run around justifying their use of nukes on Hiroshima and Nagasaki, Blair runs around trying to justify the war in Iraq. Neither can be justified as both were both disproportionate and wrong.

The one thing that stands out is that the media aided and abetted this malarkey. Even today that continues because the media are money-making enterprises and government is big business.... so big that the term “democracy” no longer represents the small cluster of vested interests that now drives our various governments within the OECD (not just the USA).

The fringe commentators tend to be discredited because their views are not allowed mainstream air time. But occasionally those at the fringe report on matters that concern us all. ... the survival of our economy and its rule of law...for example...

<http://www.infowars.com/delusional-america/>

### **BRICS and the SCO grow stronger**

Personally, I think America is still too large and too powerful to be killed off by the foolishness her actions – at least in the short term. But by internationalising her institutions and her currency, the USA has become vulnerable to the loss or defection of her friends. The coalition of opposition forces via both the BRICS and the SCO is growing stronger with each year. But I don't think the Russians coalition will defeat the USA in battle, only the collapse of America's complex society via hyperinflation.... and the run on uncontrolled derivatives liabilities from the next crash could destroy her financial heart.

### **A financial meltdown??**

Unfortunately a financial meltdown would not only bring an end to globalisation but it would possibly destroy many of us too. Despite this indictment, globalisation will stagger and fall if/when energy to drive transport starts to wane at any rate. All the money that the US Fed and other central banks can print cannot change that eventuality. The USA is very committed to globalisation and yet increased transport costs could kill that. The USA is an agricultural powerhouse that the rest of the world relies on. However a mix of top soil depletion and the likely eventual collapse of the Ogallala aquifer could change that and change the food adequacy prognosis for the planet...here is Gwynne Dyer in a depressed mood...

<http://www.straight.com/news/818136/gwynne-dyer-forget-peak-oil-weve-reached-peak-everything>

That is a question of “when” not “if”.

Let us all go back to dreaming...about the mythological EESU and what perhaps it could do to mitigate these entropic forces.

### **Natural Gas in the USA**

This video and the comments at the foot by industry experts “West Texas” and “Rockman” are worth looking at....

<http://peakoil.com/consumption/special-report-natural-gas>

Let's face facts, the USA imports 7% of her natural gas and imports 7.5 million barrels of oil per day. Energy independence is a dangerous falsehood for the USA – it will never happen (short of the arrival of the mythological EESU or similar, of course.)

### **Oil trend - up or down?**

OK but which direction is supply and price going to trend in 2015?...

<http://www.bbc.com/news/business-31093215>

This article is interesting and seems to take a bet each way...but today Brent closed at USD54.91bbl and WTI hovered at USD50/bbl so these prices are about \$5/bbl up in the low...

[http://seekingalpha.com/article/2871336-the-best-oil-opportunities-what-to-avoid-and-what-to-embrace?source=email\\_macro\\_view\\_edi\\_pic\\_0\\_0&ifp=0](http://seekingalpha.com/article/2871336-the-best-oil-opportunities-what-to-avoid-and-what-to-embrace?source=email_macro_view_edi_pic_0_0&ifp=0)

## **Bitcoin currency - what next?**

This article comes closer to my own personal view of Bitcoin than most others I have read...

<http://www.internationalman.com/articles/dead-currency-walking>

## **Zenn – a turning point?**

Well, this is not new news to folks getting my emails...

<http://www.cantechletter.com/2015/02/zenn-motor-breakthrough-moment-says-paradigm-capital/>

## **What is happening in Russia?**

Russian tanks in mufti...rumbling through Ukraine... Ukraine and Russia have been the granary of Eastern Europe, so one wonders how much planting will happen this spring?

<http://www.csmonitor.com/World/Security-Watch/terrorism-security/2015/0202/Ukraine-rebels-vow-to-reinforce-troops-as-US-reportedly-mulls-rearming-Kiev>

The proxy war in Ukraine is dangerous but can be sorted out. Mikhail Gorbachev is more concerned over global implications of the new and real cold war...

[http://allnewspipeline.com/Gorbachev\\_Warns\\_Again\\_Of\\_WW3.php](http://allnewspipeline.com/Gorbachev_Warns_Again_Of_WW3.php)

Russia is moving towards a “war footing” of sorts. She is converting cash reserves to gold and her interference in Ukraine is increasing past the level of lame excuses (the same could be said for CIA policy on Ukraine). But the axis of power in Russia has also changed, and (unthinkable as it may be) soon even Putin may be powerless to rein in the Siloviki...

<http://www.csmonitor.com/World/Europe/2015/0202/Oligarchs-out-siloviki-in-Why-Russia-s-foreign-policy-is-hardening>

I wonder how this impacts on the status of Medvedev, Sechin and co? Even the popular foreign minister Sergei Lavrov may become marginalised...so these are signs to watch for.

Putin’s move to offer the EU access to Gazprom gas – not through Ukraine – but through Turkey, is tantamount to saying he does not need Europe’s gas market because he can redirect supplies to the Asian market.

Bellicose or not, Russia is getting more isolationist and the USA is pushing her in that direction. I wonder if the EU is really awake to all the implications?