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Better-Management Newsletter 17 January

Much of the world waits with a mixture of great expectations as well as fears of what the 'elite establishment' will do to counter the US people's choice for President, Donald Trump.

I expect it won't be long before Ban Ki Moon is back from his time as head of the UN and running South Korea – given their present impeachment issues...from Seeking Alpha...

“[Ban Ki-moon is due to return](#) to South Korea on Thursday, where political parties will lock horns to recruit him. Having stepped down last month as the secretary-general of the United Nations, Ban is leaving New York and moving back to Seoul to presumably seek the presidency as his home country grapples with its worst-ever political crisis. “

I am with Trump on whether Russia interfered in the US presidential elections. I think it is rubbish and I also think the Obama administration has gone too far with the vilification of Putin. Is this for reasons of domestic politics? I don't know. But here is one school of thought we could possibly consider?

<http://www.newstarget.com/2017-01-12-the-coming-famine.html>

2016 was a year when the global population continued to grow by a net approx. 90 million. So we enter another year with more people who are individually consuming more of the world's renewable and finite resources, driving about 50 million more cars and spewing out more pollutants, cutting and burning off more rainforest, building more houses and enjoying ever greater prosperity. So we should question how this process will one day end? (*Editor's note: many of Malthus ideas in his publications in 1799 to 1803 have been well superseded. As well, the rate of increase of population is now reducing - which isn't to say it's not far too high. Perhaps the tide is turning?*)

<http://blog.heartland.org/2017/01/economic-ideas-thomas-malthus-on-population-passions-property-and-politics/>

Donald Trump's tenure may be determined by what the military industrial complex allows him to do as well as by the two checks put in place by the US Constitution...the Congress and the Judiciary. Reality may also cause him problems, and while most folks are focused on his plan to make the USA energy self sufficient, he has been thrown a curved ball by the US oil, gas and coal lobbies, apart from the horrors of the US' economy and finances.

<http://www.eclectications.com/#post2>

The Economy

The retail sector is now being hit badly by on line purchasing of goods...

http://seekingalpha.com/article/4035460-retail-apocalypse-sears-macys-limited-closing-stores?source=email_macro_view_eco_4_27&ifp=0

I cannot see this helping US retailers as Jack Ma will eat their lunch. From Seeking Alpha...

"Donald Trump had a "great meeting" with Alibaba's (NYSE:[BABA](#)) Jack Ma on Monday, when they discussed creating 1M new American jobs in five years. Some are calling the assertion a stretch, however, based on the company's definition of the goal. "Alibaba will create 1M U.S. jobs by enabling 1M American small businesses and farmers to sell American goods to China and Asian consumers on the Alibaba platform."

The CCP is in a dream world of their own as corporate and banks borrow money to pay interest on previous borrowings...from Seeking Alpha...

"China is vowing to contain high corporate debt levels and further cut excess coal and steel capacity, as investors scrutinized inflation data for signs of improved demand in the world's second-largest economy. The consumer price index for December climbed about 2.1%, on higher pork and fuel prices, while the producer price index jumped 5.5%, the fastest pace since September 2011. “

Nothing is ever made without using energy. So how is the energy scene likely to affect the global economy in 2017?...Gail's perspective...

<http://peakoil.com/consumption/gail-tverberg-2017-the-year-when-the-world-economy-starts-coming-apart>

Meanwhile the gold price has been steadily rising and starts the week at USD1,200 per oz with silver at USD16.90/oz. These are the best volatility indicators available. My opinion on gold is that the only time anyone will want to hold the metal is when really bad stuff happens – then it will be too late. Avi Gilbert sums up the reasons why market indicators of what is likely to happen to gold prices cannot be relied upon. Sentiment is fickle and rational reasons for price moves often turn out to be head fakes...

http://seekingalpha.com/article/4036904-sentiment-speaks-yet-another-leading-indicator-gold-bites-dust?source=email_macro_view_top_articles_0_0&ifp=0

I don't regard our "investment" in gold or silver and even EESor as true investments. They are merely hedges against bad things happening.

But I do expect bad things to happen. How and when it all plays out just remains to be seen.

Remember that a world with zero or negative interest rates is a world different to the world it has been any time in the history of humanity. The world where banks print money to avoid going bust is also unique in human history. So if you don't think that bad things are going to happen as a result...perhaps it is time to take stock.

If you think we can get to 2030 with 9 billion people on the planet and not have resource allocation issues, then that too should be thought through. If you didn't read Chris Martenson's commentary on this, here it is again....

<https://www.peakprosperity.com/blog/105291/we-enter-2017-keep-big-picture-mind>

Energy

I think that people who are waiting for atomic fusion as a viable energy source are in for a long wait. Low energy nuclear reactions (LENR) also referred to as "cold fusion" are still being played with and I know of no experiments promising anything in the immediate future. Meantime a company called Industrial Heat is presently taking one of the key proponents of LENR (Andrea Rossi) to court in the USA...and it is unclear to me whether any prototypes have really ever proven to provide more energy than they consume.

The attempts to replicate the sun's nuclear reactions are also in wait and see mode while gobbling up billions of dollars. The biggest experiment of all is the ITER Tokamak fusion reactor, yet they have trouble releasing the truth about their claimed successes...so I doubt we will see any fusion reactors contributing to the power grid in my lifetime...

<http://news.newenergytimes.net/2017/01/12/the-selling-of-iter/>

There is a lot of buzz about uranium and yet prices haven't yet begun to move much higher. It could be because producers like Kazakhstan are trying to suppress supply or because India and China are bringing more nukes on line – and of course Japan restarting some of theirs.

<http://www.mining.com/worlds-top-uranium-producer-kazakhstan-to-cut-output-by-10/>

and

http://seekingalpha.com/article/4036076-uranium-pops-rally-real-time?auth_param=1d3f59:1c7cvh2:4e34bf03e33d6d5e333d3e0fd30b5542&dr=1

and

<http://thecrux.com/uranium-is-soaring/>

The lowest risk (and uranium producers are all relatively high risk) is of course Cameco but then there are low cost quartile, very high risk explorers like Fission and Plateau. My latest acquisition is some more Azincourt which is up in the stratosphere, risk wise...but it is only part of my balancing act to get out of the industry....all too risky for me. Even so, the availability of enough uranium in the soil in significant enough quantities to meet power generation demand is also rather suspect. Uranium prices are at rock bottom still due to Japan's fleet of reactors being off line. But the situation is expected to change...

<http://cassandralegacy.blogspot.co.nz/2017/01/peak-uranium-future-of-nuclear-energy.html>

and

<http://www.kitco.com/commentaries/2017-01-13/The-Uranium-Miner-Sector-Has-Bottomed.html?sitetype=fullsite#.WHqxutS8shY.linkedin>

Hence the slow recent rise in the price for yellowcake.

Peak oil is rearing its ugly head...

<http://www.alternet.org/environment/economic-oil-crash-around-corner>

In the meantime the lies about the sustainability of variable energy producing solar and wind farms needs to be debunked...everything relies on fossil fuels and always will do, until there is a suitable energy storage system that allows continuity of supply into the grid...

<http://www.forbes.com/sites/michaelyllynch/2017/01/10/will-dishonesty-kill-cleantech/2/#6ef6c5949122>

With more intermittent power generators, storage is the issue...

<http://energypost.eu/despite-hype-batteries-arent-cheapest-way-store-energy-grid/>

Peak oil never went away, but a 1-2% oversupply was enough to crash global oil prices as everyone competed to sell their output. More from the latest HSBC report...

<http://peakenergy.blogspot.co.nz/2017/01/hsbc-global-oil-supply-report-september.html>

Given that the oil used each year comes to about 32 billion barrels, the news that only 3.7 billion bbls of new resources was found is a bit of a let-down isn't it?

<https://www.bloomberg.com/news/articles/2017-01-10/oil-discoveries-seen-recovering-after-crashing-to-65-year-low>

New finds are small and rare and finds like these below that are now considered newsworthy would never have been thought of as worthy of comment before...

http://www.rigzone.com/news/oil_gas/a/148091/exxonmobil_strikes_more_oil_offshore_guyana

and

http://seekingalpha.com/article/4036887-conocophillips-big-new-oil-discovery-alaska-produce-100000-barrels-per-day?source=email_alternative_energy_investing_top_articles_0_0&ifp=0

Today's oil price is not good enough for the Saudis or the Russians....

http://seekingalpha.com/article/4036894-weekly-oil-markets-recap-saudi-wants-higher-oil-prices?source=email_macro_view_com_1_12&ifp=0

Climate 'science'

I am intrigued by the publication of a study of the Great Barrier Reef that showed the coral die-off being witnessed in recent years was previously replicated some 126 thousand years ago during a similar warming episode and yet the findings showed the reef recovered afterwards (*Editor's note: as the GBR has from many short-term cycles such as the recent El Nina*).

I understand the opinion of the researchers on the Barrier Reef study was that the warming last time around had nothing to do with humanity and yet this time, the situation is more severe because we humans are causing it with our greenhouse gas emissions. At least, that was the way it seemed to be portrayed. Sure there are 7.35 billion more of us humans now. Sure we do burn fossil fuels, but this is a leap of faith on the part of the researchers who may simply be confirming an existing bias.

Just as I am so reluctant to accept explanations that could mean we humans are going to destroy our world (well we do not have the power to do that – just the power to cause some human die-off), I see the IPCC brigade refusing to accept the possibility that they could be seeking explanations that confirm their own pre-set world beliefs. The culling of university faculties to eliminate “climate deniers” hasn’t worked for that IPCC “97%” consensus (*Editor's note: the '97%' has been proven totally invalid, based on fraudulent maths by an Australian academic, but taken up and larded by many other extremists that deny the evidence against their views*). The debate continues on. Even America’s new president seems to harbour the same doubts as I. This exchange between a sceptical senator and the Sierra Club is a case in point....

https://www.youtube.com/watch?v=QR_tF5CYIPM

I ask, after 12 years of watching the debate, can someone please convince me with real facts during 2017, one way or the other? I am not sure that would be important because humanity certainly does not have the capability to do what the IPCC mob want world governments to do anyway.

So the point is moot and that is the only part of this debate I am certain on. But I would like to know so I can at least cut down on my reading. (*Editor's note: the point is 'moot' mainly because so many entrenched interests, including most main stream media, keep publicising the extremist AGW agendas and publicising reports mostly paid for by governments and organisations such as the UN that support the AGW agenda. For those who wish to have a balanced view, there are many relevant articles at <http://better-management.org/environmentalism-good-dangerous/>*).