

The Great Simplification

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[00:00:00] Greetings, approaching the end of the year. one of the things I struggle with in this podcast platform with the Franklies, with the guests, with the presentations is there's a lot of people who are newly coming to these topics. And a lot of people that have followed this podcast from its start almost three years ago, and there's an accordion, mix between the advanced, the intermediate, and the basics of energy ecology and human behavior.

[00:00:30] We're working on a very long, intro primer, series of videos, takes a little time, but that'll be out in the first quarter of next year. Today I'd like to talk about some of the advanced implications and inferences, that emanate from the logic, of The Great Simplification, the guests, and, my own, integration.

[00:00:55] So, in no particular order, here are some points on the inferences, from the logic of this system's synthesis.

[00:01:18] So, first of all, what is the philosophy of this podcast? I guess it's my philosophy. First of all is we have to fly up high enough to see the system and how the parts and the processes fit together. It's not a single issue podcast. Secondly, I don't know what's going to happen. I have strong and moderate and weak opinions of what is not going to happen and what possibly could happen, but I view the world as a probabilistic future, a probability distribution in my mind, on various topics.

[00:01:54] Each one has a different probability distribution that changes every day based on what I learn, what happens in the world. I'm unsure, and, I actually embrace that, uncertainty, but I do know that, for instance, climate change, ecology, human evolutionary behavior, energy, materials, money, how those play a role in the system.

[00:02:18] thirdly, this podcast is apolitical. We don't take, sides on, what to do. Ultimately, everything is political, but I believe we need to paint the ground, rules and the, board that we're all a part of. you know, the problem is then people that

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are very concerned about climate lump it into solar and wind and batteries are the answer.

[00:02:44] and we should just talk about climate and lock that down. What is the situation on climate and then get to solutions. But sometimes all the things are lumped in together and that becomes political. Fourth is, I hope long term followers know by now that I am open minded and curious. I love to learn.

[00:03:02] I love to learn about our situation, understand it better because that informs what's possible and what's possible. is non prescriptive. What I'm trying to do is, pass the baton to thousands, millions of other humans to play a role in our collective future. And directionally, I have a feeling of what that looks like at various scales, but I don't know, what to do.

[00:03:26] Actually, I'm hopeful that many of you will figure out what to do. So with that brief preamble, here are some of the core points, from this podcast. some are slight review, but, not really. So, energy is fundamental to our societies. we are energy blind. we neglect how much energy supports our lifestyle.

[00:03:51] Are we running out of energy? No, we're running out of affordable energy at scale to power this system of claims and expectations and institutions. There are differences between, energy, what it provides us, also energy properties, energy fudgability. You can't just exchange one type of energy for another type.

[00:04:13] there's, scalability, spatial distribution, power density, energy density, EROI, transportation, transportability, intermittence, all those things. And who has it? Where does the energy reside? the BRICS control about 50 percent of the world's oil exports at the moment, as one example. So energy, It's quality, it's magnitude, and who has it, is a core part of this story.

[00:04:44] Second, free markets and technology are false gods in our culture. we, not we, but a lot of people really, highlight the importance of capitalism and free markets to, an ideology of the future. We don't have free markets. Probably the biggest commodity in the world is capital, and capital is constrained by tons of rules and favors and special situations.

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[00:05:18] The government of Italy right now. is borrowing money at a lower rate than the United States. Under what free market rule does that make sense? capital is, has favorable, terms for different people, different countries, different institutions. We don't live in a free market. And technology, has historically been in service to human objectives, now we are in service to technology.

[00:05:48] As you all know, technology is powered by 85 percent fossil sunlight, which is depleting, technology and energy and materials together contribute to GDP, but technology isn't the god, technology isn't the, end result, we use it in service to something, and right now we're using it. Very unsustainably in service of infinite growth on a finite planet.

[00:06:18] However, growth is now waning, and it's being kept alive by AI, by debt, and by shale oil, which is the bottom of the barrel. And we are now not a few percent. away from something more sustainable, we're a lot. We're like 30 percent or even 50 percent globally. the energy, material, ecosystem functions that we're, consuming, we're a long way from sustainable.

[00:06:48] And yet, instead of recognizing this, we're hitting the turbo charge button, to keep things going a while longer. That does delay, this speed bump, which I refer to as The Great Simplification, but it makes it steeper, eventually. We are taking more than our share. we are one species of approximately 10 million on the planet.

[00:07:10] That is an ecological overshoot. We are, way beyond our long term, carrying capacity, and in so doing, we are drawing down the carrying capacity of future generations of ours and other species. I've repeated many times the impact on insects, birds, animals, fish, wildlife, ecosystems, fish are now having to swim northward because warmer water holds less oxygen and southward if they live south of the equator.

[00:07:39] We, our species, is taking more than our share. There is a choreography. that is akin and linked to the economic superorganism's metabolism that dictates what is important in our society in contrast to what is voted on in pursuit. And the things that are important are downregulated to the things that are related to power.

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[00:08:09] If we think about the military, the bond and currency markets, economic growth and related institutions, energy, politics, citizenry, and the environment, and let's not forget artificial intelligence. We could argue that citizenry and the environment are the most important. However, they are at the bottom of the power structure, which is A.

[00:08:34] I. is first because applying A. I. to data is the technological equivalent of applying fossil fuels to human and draft animals. AI, then military, then the bond and currency markets, which underpin the, glue, which is the global finance, then growth, then energy, then politics, then the citizens, you and me, then the environment.

[00:08:59] The environment is dead last in what actually dominates the decision making at high levels behind the scenes in the economy. That should be no surprise to people here. The implications from that is that climate is not going to be chosen or prioritized at a global level. We have a lot of discussions about switching the bad carbon producing energy to the lower density but lower emitting energy sources like solar, wind, nuclear, etc.

[00:09:37] But in addition to that net zero discussion, we also have issues of energy poverty. of energy security, of energy per each nation, and climate is not going to win this argument. So one of the core implications of this website is that the climate movement and the broader, in service of life movement is going to have to move underground and think two or three steps ahead because we're not going to vote on climate change.

[00:10:08] our way to a more stable climate. It's just not going to happen. And I think recent events should give evidence to that. And that is not a feel good statement to many of you that are devoting your lives on this planet towards making the climate less bad than the default. but it's the real politic, situation.

[00:10:30] We are headed for a multipolar world. But I don't think we're going to go to a multipolar world. If we consider, now I can't think of his name, the open AI guy, he, said that we're 95 percent of GDP is going to be captured by AI. the fusion of AI and military capacity, this is a winner take all dynamic.

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[00:10:56] And if you think about what fossil fuels did and turbocharged our society, AI is going to do that again with data and power and wealth. I don't think the United States is going to go quietly. the, the bully on the playground and the silverback gorilla is not going to just go lay in a hammock, and, eat grapes.

[00:11:23] I, suspect we are not headed for a multipolar world, and the, death throes of what's been built over 200 years are, going to thrash and writhe about, in coming decades, for better or worse, we're still in a unipolar world and all the implications that has. Many people watching this podcast, many people in the world, are working on single issues that if you consider that single issue it makes the future better.

[00:11:57] Low carbon energy, more sustainable food systems, global peace, etc. When viewed from a system synthesis, we have to look at these single issue, things. Many of them are dead ends. Why? Because we have to look at the law of aggregate probability. for solar and wind to scale to be a hundred percent renewables, you first have to ask, is this physically possible?

[00:12:30] in this case, I don't believe it is. Well, actually I do believe it is, but at a tiny fraction of, today's throughput. what, is politically possible. What is possible with all the constraint constraints of the five horsemen with debt and the fact that we're launching missiles into Russia and Russia has this hazelnut thing that can go undetected and is not nuclear and has these rods from God.

[00:12:56] What are the chances that Russia, China, everything holds together in the next 10 years and we're somehow globally able to miraculously go to a hundred percent renewables. It's like, okay. We have the capacity to build a 1, 000 foot statue made out of cheese of President elect Donald Trump and maybe even gold plated.

[00:13:16] We could do that, but what are the odds that we actually could do that with all the thresholds that have to be met for such a thing to happen? So we have to fly up high enough and look at the aggregate probability of all the things that have to go right for some of these, esoteric pursuits to happen.

[00:13:36] And, I prefer on looking at what's likely to happen based on the aggregate probability, which is we're headed for a world of less pretty much no

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matter what. Now less of course depends on who and defined how, but I think there is a big economic speed bump in the not too distant future. If people all around the world, suddenly, overnight, agreed that plastics are critical, that endocrine disrupting chemicals are affecting our bodies, our pets, the natural world, that climate is out of control and we need to reduce our emissions, that all of these things to do the right thing for the future of the world, we would still have to navigate the five horsemen of the coming decade, which is debt overshoot.

[00:14:32] geopolitics, complexity, the social contract, and ongoing, deleterious situation from, the warming already in the pipeline. so we are headed for a world where you divide the population and you divide by how much energy and materials per person, we're headed for a world of less. So if we think two or three steps ahead, that is the future that we need to prepare for and respond to.

[00:15:05] Along those lines, I'm talking about limits to growth. We will hit social limits to growth well before we hit actual aggregate physical limits to growth. In other words, the median income is going to decline faster and go negative before we The mean average income. If you have, ten people, and one person makes a million dollars, and the other nine make fifty thousand, the average income is a hundred and forty five thousand.

[00:15:43] But, the median income, the middle person, makes fifty thousand. So we're headed for a time when, with AI and debt accumulation and, all the different, things that we rabbits, we pull from a hat to keep things going, the average person is going to, as Peter Churchill would say, continue to immiserate, even at the time when the aggregate is flat or continues to increase.

[00:16:15] And so social limits to growth. within countries will be hit first, as well as between countries. I think the implications of energy, geopolitics, and local political national politics suggest that Europe is going to de industrialize first. they can't continue to increase military spending, increase debt, import all this energy, which so far has been quite cheap, but if it gets expensive, that has massive economic implications.

[00:16:46] So I think, The Great Simplification is already here, it's just not evenly distributed. As all this happen, facts, are increasingly going to be dominated by feelings. People will feel something, and then using, confirmation bias, motivated

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reasoning, etc. choose to find the facts that support their line of thinking online or whatever.

[00:17:14] And so local discourse with real social interaction, observing what's happening in the real world is going to be really important and podcasts and newspapers and media, are going to come less important other than as, clearing houses for like minded people to come and find things they agree on.

[00:17:40] In 2025, I hope to have a lot more, content, both my own and, guests, on what to do. What do we do as individuals facing the constraints that I just laid out? so I don't want to spend a whole lot more time here unpacking that, but no matter what, We're going to need community again. We're going to need other humans, for purpose, for connection, for meaning, for resilience.

[00:18:12] we're going to need pro social prepping, in a way that we're not prepping for. I think I can predict that We can change the definition of what it means to be rich and successful away from financial metrics and towards social built natural and human capital. after basic needs are met, most of the best things in life are free.

[00:18:38] And I think we're going to have to learn that again, instead of just looking to our gadgets and our social media and our Amazon trucks, to get our evolutionary neurotransmitters. For those people that are following ahead and can understand that we're not going to tighten our belts en masse and change our cultural conversation en masse, simplifying first and beating the rush is a good strategy.

[00:19:05] and somehow we have arrived, another major implication of this podcast, at a species level story. it's not going to be easy. Not everyone's going to pay attention. There is a aggregate probability that applies to humans being interested in and taking and onboarding this, conversation as well.

[00:19:27] but some of us are going to have to value and defend the natural world, both where we live and globally, as part of the effort that we take on board during our time alive on this planet. This is not a feel good, frankly, I'm just laying out the implications of, some of the threads that we've been following, over the past year, yet I truly believe that understanding what we face, is critical, James Baldwin

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famously said, not everything that we face can be changed, but nothing can be changed.

[00:20:03] can be changed unless it's faced. that's also part of my philosophy. I have a lot more to say. I have, will say a lot more about the direction that we can change in our own lives, in our communities and the world. but I just wanted to put this little, framework of inferences out there. Talk to you soon.