

Thoughts on Coming Apart and the Coming Great Reset



**Turning and turning in the widening gyre
The falcon cannot hear the falconer**

Kit Webster

Themes and Theses Why I'm Contemplating Out Loud

(Initially formulated in the early 90s, following decades of reading history, philosophy, religion, psychology and a lot of contemplation, particularly on the subject of cycles. In the end, this is a relatively straightforward story about human nature and of history rhyming.)
The US will enter a period of crisis in the early 2000s. In the late 90s, I incorporated Strauss' and Howe's terminology of the Fourth Turning (without incorporating their generations paradigm) and agreed with

Howe that the end stage of the crisis began with the Great Financial Crisis and would last into the early 2030s. We are now at the beginning of the end stage of the crisis.

The crisis will be serious and could be existential.

Internal strife will increase, up to and including secession and civil war. International conflicts will increase as the vacuum created by the weakening of the US is filled by other players.

There will be many threads to the crisis, but the primary thread will be debt, deficits and entitlements. Other factors include, eg, demographics, a loss of meaning and myth and a loss of self-discipline.

Politics will move leftward as citizens look for some refuge from the chaos. The US will become increasingly susceptible to a (man) on a white horse, who can come from either the left or the right.

Inflation, as the most likely way to address debt since austerity is not politically acceptable, will significantly lower standards of living, exacerbating the civil crises.

Eventually, the dollar will be inflated away and lose its reserve status. Once the old rot is cleared out, and assuming continuity, there will be the basis for the establishment of a new order.

There will be what Strauss and Howe calls a First Turning . It will be constructed out of the physical infrastructure, wealth, energy sources, thoughts and values in the culture at the time. At this point in time, those components are unknowable. We can anticipate that the next future will be increasingly chaotic. We can anticipate that there will be destruction, and then reconstruction from some level. We cannot yet anticipate the form of the reconstruction or the level from which it will begin.

(Added in the early 00s) While humans are contributing to global warming, policies implemented to address manmade global warming will create a significant energy crisis, probably toward the end of the Fourth Turning.

(Added around 2020) The loss of faith by our youth in our founding principles means that the new order will at least partially be based on

new principles. As yet, I have no visibility as to what those principles might be.

(Added in 2023) The lowering / elimination of standards in education, the judiciary, law enforcement, the military and other segments of our society will create a population unable to adequately comprehend, do or respond to the challenges of democracy and culture.

(Added in 2025) China has won - at least for the next 5-10 years. The US is dependent on China for the materials it uses to create defense items. We literally cannot fight China without China's help. China's industrial base is impressive; the US has to rebuild. China is out-innovating the US. China is turning out more engineers and scientists than the US by far. This does not mean that China does not face challenges - demographics perhaps being its primary challenge. The US military remains stronger than China's, but in an age of drone warfare, that statement means less than it has historically. The US still has bargaining chips and will need to use them to maintain any kind of status quo.

(Added in 2025) AI has the potential to profoundly affect human culture. However, AI faces several significant hurdles, including the demand for massive amounts of electricity, which may not be available, and a cultural revolt against its existence. Since it could be existential, and since China is pursuing it, the US has no alternative, at least in the short term.

Pot Pourri

January 9, 2026

Quotes to Contemplate

As a nation of freemen, we must live through all time, or die by suicide. -

Lincoln

What increases with civilization is not so much immorality of intent as opportunity of expression. - Will Durant

The only reason the Rules Based Order mattered in the first place was because the U.S. wrote it and the U.S. enforced it. And the reason it no longer matters is because the U.S. is the one tearing it down. To those appealing to international law...who exactly are you appealing to? - Santiago Capital on X

We'll transition from treating property as an individual good to a collective good. Whites especially will be impacted. - NYC Mayor

Mamdani's Tenant Director, Cea Weaver

The Party told you to reject the evidence of your eyes and ears. It was their final, most essential command. —George Orwell, 1984

Summary of Primary Thoughts To Contemplate In This Issue

Venezuela is a basket case - a long time and many, many dollars to get oil flowing in any quantity.

The US taking over Venezuela is like the dog that catches the automobile.

Trump is making a lot of noise about Greenland. In the end, my bet is that he makes them an offer they can't refuse. By that, I mean basically buying their affiliation, which they approve by voting.

The US created the global order and now it is tearing it down. That it was to be torn down in this Fourth Turning was inevitable and part of my original theses. Trump is taking a rip-the-Band-Aid-off approach.

"Meritocratic societies do not maximize long-term social mobility or economic equality. They maximize efficient sorting. Once this sorting is done, mobility declines and inequality increases. This creates a backlash to meritocracy despite its success in generating prosperity."

AI's ability to code is both impressive and frightening.

Venezuela According to Peter Zeihan

Wow!

I just watched an [update](#) on Venezuela by Peter Zeihan.

Very, very bleak.

He says it is a dead state that has been so poorly run that it will take decades and hundreds of billions of dollars for it to become functional again.

The good news is that it has lots of oil.

The bad news is that it will take a long time and a lot of money to rev up production.

Minnesota Update

Perhaps the best indicator of the severity of the problem is Walz not running for governor in the next election.

I asked Claude to tell me what we have learned in the last week about public fraud in Minnesota.

Key Developments (January 2-9, 2026):

Governor Tim Walz announced he is dropping his reelection campaign [CBS News](#) amid the intensifying scandal. The Trump Administration announced creation of a new DOJ division for

national fraud enforcement, [The White House](#) citing Minnesota as the catalyst.

Congressional Action: A House Oversight hearing on January 7 drew partisan fury, with Republican state legislators testifying they believed Walz knew about the fraud and ignored it for political reasons related to the Somali-American voting base. [CNN](#)

Federal Enforcement Surge: The Trump administration deployed roughly 2,000 DHS agents to the Twin Cities for a 30-day surge [CBS News](#) combining immigration enforcement with fraud investigations. DHS has arrested over 1,000 undocumented immigrants in recent weeks and identified over 1,300 fraud findings from site visits. [The White House](#)

Asset Seizures: A federal judge approved a preliminary forfeiture order against Feeding Our Future ringleader Aimee Bock for \$5.2 million in assets, including a Porsche, bank accounts, and designer handbags. [Fox News](#)

Funding Freeze: HHS froze \$185 million in childcare payments to Minnesota and CMS paused Medicaid payments to 14 high-risk programs until audits verify legitimate claims. [The White House](#)

Scale: DOJ has charged 98 defendants in Minnesota fraud cases—85 of Somali descent—with 64 convictions so far. [The White House](#) The fraud potentially involves up to \$9 billion across programs including child nutrition, housing stabilization, autism services, and home health care.

Boom! - from X - It was easier to capture the leader of Venezuela than it was to find a kid in a Minnesota Somali Daycare...

The Bee - Exhausted Nation Wishes Minnesota Would Be Normal For Like Five Minutes.

Our World In One Meme



Islam, Cont'd

HW, another long-time internet friend, who has provided me with valuable, European-based feedback over the years, weighed in. I have copied his email at the bottom of this post.

My original point was about the clash of Western and Islamic values. It was not about crime, per se. Generally, HW focuses on crime. He has some interesting things to say.

Also, the Guardian, of all places, had an article about civil war in the UK. The theme was - it's still unlikely, but people of all stripes are beginning to talk about it. "A former government adviser on counter-insurgency ... envisages a messy asymmetrical conflict breaking down along urban and rural, but ultimately ethnic lines. Three "sides" will emerge, he

claims: a Muslim population barricaded into urban enclaves, a white British one that regards government as illegitimate and “captured” by elites, and the increasingly beleaguered vestiges of the state.” (For the uninitiated, the *Guardian* is a very liberal newspaper in the UK, that, nonetheless, does some good reporting - and from time to time goes bonkers.)

LH, the reader who called me on no-go zones, wrote another interesting email, in part, “To expand on your focus on Muslims and the rest of the world, I want to direct your attention to something that is just happening in Sweden. Ebba Busch, the Vice Prime Minister, a Christian Democrat, has suggested that wearing burkas and hijabs to be prohibited in Sweden. It has started a considerable debate, not surprisingly.

Personally, I am in general sympathetic to personal choices, but given the culture these women come from, it is questionable whether they really have the autonomy to make the decisions about what to wear. Of course, if you walk around in Stockholm dressed like that, you are demonstrating that you are not interested in assimilating. And if not, should you be able to live in Sweden? It will be interesting to see where this goes. Typically, in Sweden there is a considerable debate and eventually a wide consensus is reached.”

(Kit) This whole, hajib-burka thing is very complicated.

Oversimplifying, the Quran tells men and women to dress modestly, covering most of the body and not putting yourself on display. That has been interpreted in various ways, resulting in scarves, hajibs and burkas. When you tangle this up with Western feminism, sexuality and nudity, you get a clash of civilizations.

One (overgeneralized) outcome is that new immigrants view Western women's flagrant sexuality as clear evidence of loose morals, hence the increase in molesting and groping and rape.

But, back on topic, given freedom of dress, some Muslim women, either out of peer pressure or moral conviction or both, simply prefer to remain covered. Some do not. In a 2011 Pew Research Center survey of American Muslim women, 43% wore headscarves all the time, while 48%

did not cover their hair. In contrast, up to 90% of women in Egypt have been reported to adopt some form of veiling. In Turkey, the percentage of women using a headscarf in public reportedly dropped from 71% in 2007 to 47% by 2023.

The question in the West, and it sounds like, currently in Sweden, is whether to ban the hijab and burka.

That's really complicated, and I am not wise enough to come up with an answer to this or to the hundreds of other Muslim-Western issues that will arise. However, it seems to me that Muslim women should be free to wear whatever they want to wear. The keys are - will they really be free, and is mandatory uncovering just overzealous political correctness - the never-ending urge to save you from yourself?

Night Lighting Cont'd

I intellectually grasped the wonder of night lighting, but it really hit home some decades ago when our family had a celebration in the mountains of Georgia. On a moonless night, we had to walk to our lodge from another building. Beth and I literally could see nothing. I could not see the road, or the buildings or even my hand in front of my face. In the end, I had to bend over and feel my way at the edge of the road, counting driveways to find my way home.

Reader SS, with whom I have substantial correspondence, added his two cents on lighting of the night, which is taken for granted now, but which was literally revolutionary. It, also, is at the bottom of this post.

Interview With Neil Howe

One of the most thoughtful people I have read and the co-author of one of my bibles, *The Fourth Turning*, Neil Howe, is on the Thoughtful Money podcast. A lot of things to think about [here](#).

Ian Bremmer On The Death Of The Global Order

At the bottom of this post.

This is big and an integral part of the Fourth Turning.

We have discussed most of this, but Ian does a much better job.

Markets

Updated charts

> No change in outlook. The stock market has just gone bonkers. If I am right, and with regard to the stock market, that is a low-frequency event, we are finishing up an ascending triangle/wedge and should begin at least a retracement reasonably soon.

So, You Say You Want A Revolution?

> Trump kidnapping Maduro was not on my Bingo card.

Clearly illegal.

Terrible precedent - although there was Noriega in Panama.

Don't tug on Superman's cape ...

Trump says US will run the country until there can be a smooth transition of power.

Reader LH anticipates that I will have something to say about this, and, I'm afraid, not much.

Bad idea.

This is like the dog that catches the car - what to do with it?

Will have significant geopolitical implications - every South and Central American dictator is now looking over their shoulder.

The US is now clearly acquiring natural resources through force.

These last two points are in danger of producing future commentary - stay tuned.

My guess is that he will be putting a deal together for the citizens of Greenland to vote on.

> How far the mighty have fallen - in 1950 some sources indicate Venezuela was the world's fourth wealthiest country by GDP per capita, behind the U.S., Switzerland, and New Zealand. Depending on the measuring stick, Venezuela today is in the 100-120 range. Many will blame socialism, and that is definitely part of the answer. But it is much more complicated than that. A topic for another time.

> Uh-oh. Trump says the United States "needs" Greenland for national security reasons. Greenland is back in play and it increasingly sounds like Trump is serious. I cannot imagine, but this is Trump. The word, outrage, does not begin to cover it. Prediction markets have it at 17% for this year.

Babylon Bee - "Greenland Panics As Marco Rubio Seen Donning Parka."
From X - "The simple diplomatic solution is Barron Trump marries Princess Isabella of Denmark and Greenland is given to America as dowry payment."

> "I'm not joking and this isn't funny. We have been trying to build distributed agent orchestrators at Google since last year. There are various options, not everyone is aligned... I gave Claude Code a description of the problem, it generated what we built last year in an hour."

(Kit) I started programming computers many decades ago, but also moved on many decades ago and have not kept up. Even though I can read and understand JavaScript and Python, the two primary languages used with AI, I cannot code in them. Now that I am up to my armpits in AI, coding is a valuable skill. You can be effective without coding, but you are much more effective when you code. I am "vibe-coding" using Claude. I tell it what I need from some code and it creates it. Together we debug it (there is usually a fair amount of debugging required, both of my solution and Claude's code). Just remarkable. And not a little scary.

> "Democratic Gov. Tim Walz said Monday he is dropping his bid for reelection in Minnesota, a dramatic turn for the two-term governor who gained national prominence as his party's 2024 vice-presidential nominee but now faces intense scrutiny over welfare fraud investigations in his state." - Washington Post

> Bessent - if you're on public assistance, you can't wire money out of the country.

> Fascinating - The United Arab Emirates is restricting their nationals from enrolling at British universities over fears that UK campuses are being radicalized by radical Islamist groups.

> This could get interesting and very dangerous - Minnesota Governor, Tim Walz, authorizes state's National Guard to support local law enforcement in what he describes as a "war" against the Federal Government.

> The Corporation for Public Broadcasting, which funded NPR, PBS and hundreds of local radio and TV stations, voted to dissolve because Congress cut off its federal money.

> Mamdani rolls out a multi-billion-dollar "free child care" plan for kids under five across New York State, with a special focus on "home-based providers."

> You can't make this stuff up - France will delay this year's Group of 7 summit to avoid a conflict with the mixed martial arts event planned at the White House on Donald Trump's birthday.

> Fascinating academic paper - I need to think about this and may write on it later - file under "unintended consequences." "Meritocratic societies do not maximize long-term social mobility or economic

equality. They maximize efficient sorting. Once this sorting is done, mobility declines and inequality increases. This creates a backlash to meritocracy despite its success in generating prosperity."

> "Trump orders Congress to immediately pass nationwide voter ID."
(Kit - "orders Congress?")

> I'm definitely not a Trump fan, but the man has a point - Scott Jennings: "It's Trump 42% of them would oppose it if he cured cancer."

> Trump announces steps to ban large institutional investors from buying single-family homes.

> Trump says executives of US defense contractors will no longer be allowed to make more than \$5 million unless they build "new and modern production plants." Trump also says he is banning dividends and stock buybacks for defense companies until these problems are "rectified."

Short Takes

> Ireland's state-owned energy company plans to decommission its own wind farms. All because it failed to file an environmental impact assessment back in 2003. Wait for the punchline...

The project might be saved because tearing down wind turbines also requires an environmental report.

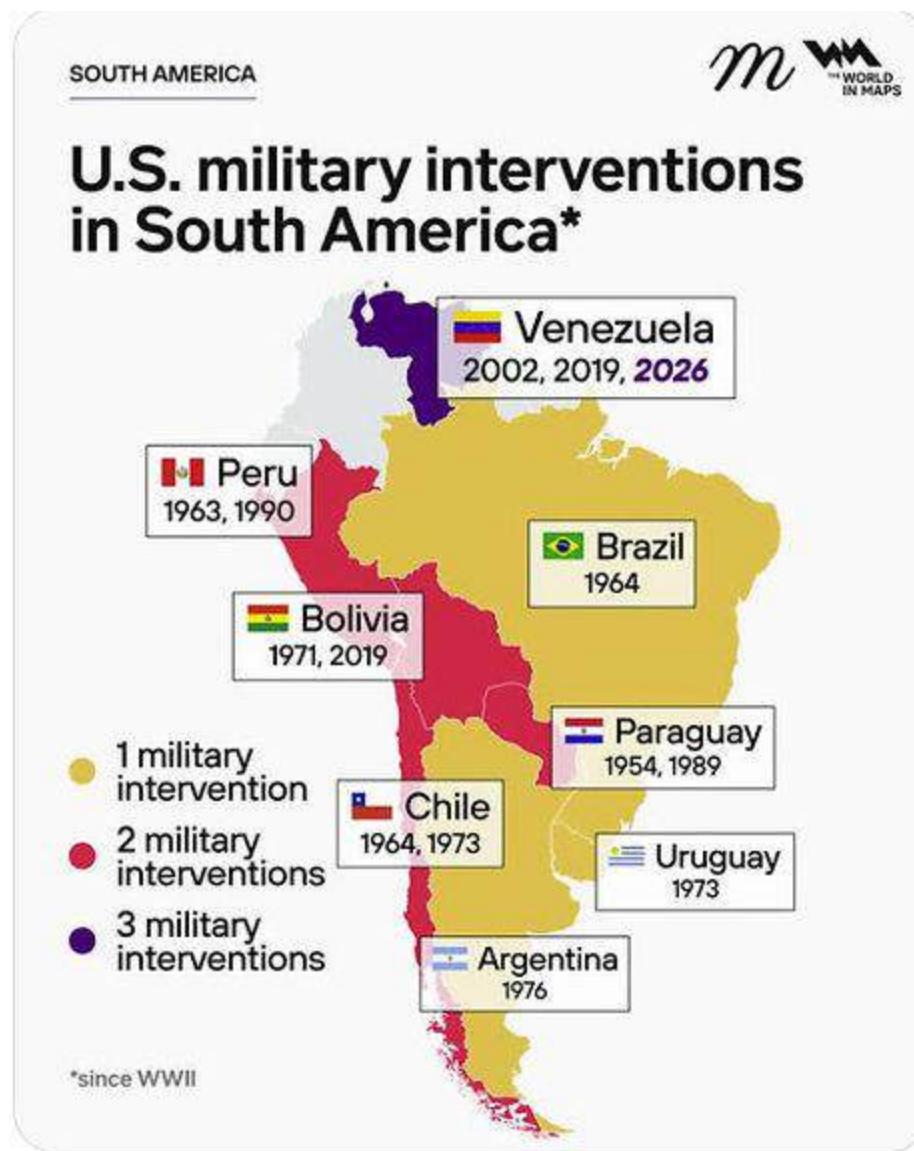
You can't make this stuff up.

> Talk about cross currents and conflicts - New York lights the tower of One World Trade Center green in honor of Muslim Heritage Month.

> Also ironic - Russia criticized the Maduro operation as the "violation of the sovereignty of an independent state."

> Headline that lets you know it's 2026 - "Trans child of Democratic donor accused of smashing JD Vance's windows."

Gallery



The World in Maps



This is correct

 **Marko Papic**  @Geo_papic · Jan 3 Promote  ...

Quick poll. What is the greatest special op ever conducted in the history of man?

Entebbe Raid	15.1%
Today's Maduro Exfil	26.9%
The Trojan Horse Infil	39.5%
Something I forgot	18.5%

878 votes · 2 days left

14 14 8.2K

Violence against women in the lifetime



*The percentage of women who have experienced physical and/or sexual violence from an intimate partner at some time in their life

Data: Gender, Institutions and Development (Edition 2019) <https://data.oecd.org/inequality/violence-against-women.htm>

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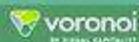
WHICH COUNTRY'S YOUTH SCORES BEST AT MATH

The Programme for International Student Assessment (PISA) test measures 15-16 year-old's real-world math reasoning. Top performers score above 500.



Source: OECD. Latest data available for 2022.

Visual Capitalist



Where Data Tells the Story



The US is at 18 - here are the top and bottom 10

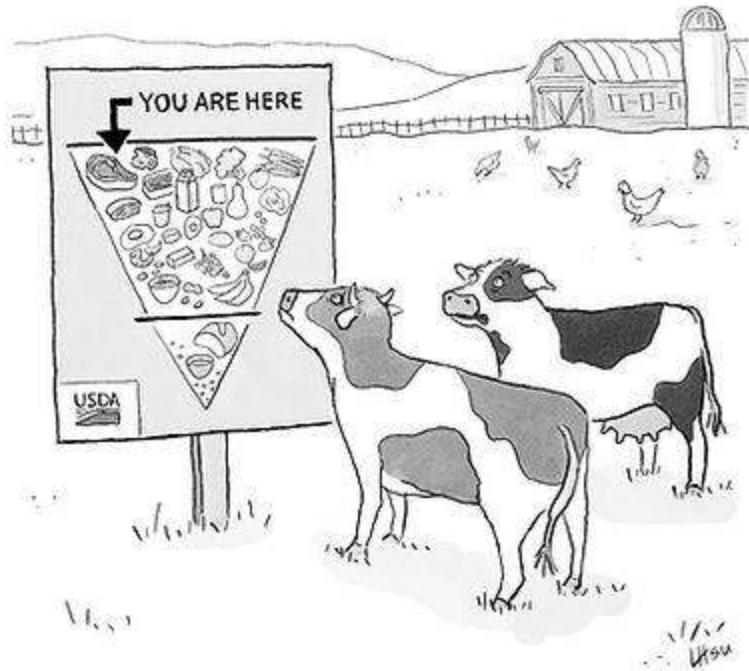
Average age people lose their virginity:

- Malaysia: 23
- India: 22.9
- Singapore: 22.8
- China: 22.1
- Thailand: 20.5
- Hong Kong: 20.2
- Vietnam: 19.7
- Nigeria: 19.7
- Japan: 19.4
- Spain: 19.2

- Chile: 17.2
- Belgium: 17.2
- Portugal: 16.9
- Bulgaria: 16.9
- Israel: 16.7
- Finland: 16.5
- Norway: 16.5
- Sweden: 16.2
- Denmark: 16.1
- Iceland: 15.6

Miscellany

The New Yorker cosplaying as the Babylon Bee - In case you haven't seen it yet, that's MAHA's new, inverted food pyramid.



Feedback From HW - Muslims in Denmark

About Muslims, in Denmark - it's a mixed bag in that generalisations about crime don't always really produce anything valuable.

There are areas in the big cities where most of the faces are brown and crime/juvenile delinquency is several times the national average. But Muslims are spread out across the country even in rural areas. I live in a provincial town of about 15,000 bordering on the sea. There are all sorts of brown faces here ranging from Tamils to Moroccans and even some Somalis. Maybe 10-15% of the population. Yet the town is as safe as mid-America in the 1950s.

Many Danes don't like the proliferation of the religion, but there is a substantial degree to which that is their own fault. Denmark actively champions human rights, including freedom of religion. Until recently they were in fact shoving a holier-than-thou attitude in this regard down the throats of most of the rest of the world, actively touting their textbook-perfect religious tolerance.

While at the same time that tolerance in private has been diminishing substantially over time.

There is a state religion here - Lutheranism. Almost nobody goes to church, like 1 or 2 percent (in contrast Norway is around 40% last I heard).

If they're really against further increases in the Muslim population than they need to square their laws with their rhetoric and make it illegal to not be a member of the state or a state-sanctioned church (at one point 10% were Catholics).

It's difficult to actively fight against what you are actively promoting at the same time. At some point basic logic takes over.

My older daughter was married for a while to a Turkish guy here, so I got some insight into the community and got to be comfortable with all his friends. I have to say that they all had a better and more acute sense of morality and right and wrong than any of the so-called Christians I've met here and elsewhere in the world. In part it may just be the naivete of being immigrants in a new country and being somewhat deferential because of it, but the one key difference I thought was the connection to their religion and the way the local Muslim church authorities were accorded absolutely unbridled respect and performed active moral governance over their 'flock'. There are always bad apples, so counterexamples can be found. Most Christians don't know even who their local bishop is, much less what brand of Christianity they adhere

to. It's not solely the fault of the people and social engineering, the churches have also decreasingly become advocates of the moderation that Muslims are often pressured to practice by their own religious authorities. Obviously some sects excepted. I'm talking about the rank and file.

So while us Christians don't like the influx, it is also increasingly obvious that if we don't start offering functional alternatives in terms of religion, i.e. going to church and abiding by our advertised religious values, then nobody is going to want to go along with our culture in the long run. We need to give them a good reason to become practicing Christians. That's not happening - there are no role models any longer.

SS on Night Lighting

Good post this week (and last week's was Politically Incorrect but imo very accurate) ... but wanted to add this comment to what you wrote

In your discussion of the advancement of "civilization" the ability to "Light The Night" was like a rocket ship ... after that happened the amount of productive non-farm work per a person could and did grow dramatically which totally changed societies

THAT is how John D. Rockefeller made his fortune.

That change to society "of lighting up the night" wasn't through the by 2 decades LATER development and widespread adaption of development and actual deployment of electric lights but by Rockefeller's goal of taking the oil found in Western Ohio (the original Saudi lights fields of the entire world - more oil per year came out of Western Ohio in the period of the 1880's through the 1890's as the rest of the world COMBINED) and refining it in the largest refineries ever built into providing inexpensive kerosene for lighting purposes to the masses.

(Standard Oil Refinery #1 in Lima Ohio reportedly when it came fully on line produced MORE kerosene than all of the rest of the refineries then in existence in the US [the world?] COMBINED produced).

John D. Rockefeller looked at providing LIGHTING to the masses as almost a religious crusade, and with his consolidation of the industry he worked to DRIVE PRICES DOWN each and every year, like Andrew Carnegie did with steel, producing his product more efficiently than anyone else and then instead of maximizing profits for the short run he then DROPPED prices every year so that kerosene was more affordable for the masses. (reportedly he was able to drop kerosene prices EACH and EVERY year until electric lights came on the scene - Rockefeller's refineries for decades were the most efficient ones in the world, often twice as efficient at getting effective product out of a barrel of crude as some as his competitors). Over time he was able to bring the price of his kerosene down by more than 98% which finally allowed even the lower middle class and poor farmers to have light at night and thus to be able to do more work.

John D. Rockefeller made his fortune not off of gasoline but by providing LIGHTING for the masses at a price they could finally afford, and in the process changed the entire work environment for all of America.

fwiw ... Separate from kerosene there was also a second source of night lighting in the east, though I don't think it applied to Texas, which came into widespread use in the US in the mid 18th century and was well deployed among the rich in the Midwest and the northeast by the 1870's ... coal gasification. Every small town of any size in my state, PA, MI, IN, IL and NY and needless to say all of the cities in those states, had a city coal gasification plant and plumbed their downtowns and the richer areas with pipes or gas delivery. (yep even by the Civil War in many places)

Coal, which was abundant in the eastern Midwest and also heavily used in the northeast, was heated and in that heating bled off flammable gasses, a LOT of flammable gasses, which were then piped through those underground pipes to the town's /cities downtowns, the richer neighborhoods, and some factories, so as to provide gas powered lighting at night (same as the lamplighter's gas for lighting street lights in London .. the same thing dynamic for obtaining the gas to fire them was coal gasification). This was long before natural gas could be piped any distance for use in the cities and coal gasification quickly became very common ... though parts of Western Ohio and parts of Western PA where oil was being produced could take advantage of locally produced natural gas that bled off from the oil wells and used that local natural gas for lighting purposes and didn't need coal gasification plants.

Of course coal gasification for lighting was uneconomic to deploy on an entire city a wide basis and couldn't work at all for those outside of the core of a city or small town, which was where JD Rockefeller's kerosene push was a godsend to the average family during the 1880's through 1910 (and still widely used for lighting by the Amish)

Today people think JD Rockefeller made his fortune off the back of the auto industry and gasoline ... NO. He made his fortune off of LIGHTING AMERICA, lighting it via Kerosene, making kerosene in the US cheaper than in any other country in the world and was thus able to light up the US during that last half of the 19th century, and in the process totally changed how people lived and worked by greatly expanding the number of working hours that each individual could accomplish during 1/2 of the year.

(yep, JD Rockefeller was already one of the wealthiest if not THE wealthiest man in America BEFORE the auto industry even existed ... because his businesses provided the ability for people to have the night time lighting that the people, and businesses, in America craved. The advent of the auto industry also using an oil derivative was just a lucky

break that allowed him to retain his fortune, actually continue to grow it, as the technology for lighting changed and demand for kerosene went into a slow but steady decline ... remember rural electrification didn't come about until the 1930's and 1940's. fwiw pressurized kerosene that then uses a mantle vs a wick for burning /lighting provides **HUGE** amounts of light with very low fuel consumption, some units still sold today that were developed in the 1880's put out the equivalent of a 500 watt light bulb, which works fine for night time factory lighting and was used for such purposes in the 1880's to 1910ish, friend has several he hangs and then uses for providing light for his "barn parties", the barn never having been electrified until the last 15 years or so)

Ian Bremmer On The Death Of The Global Order

America built the global order. Now it's tearing it down.

By [Ian Bremmer](#) January 07, 2026

2026 is a tipping point year. The biggest source of global instability won't be China, Russia, Iran, or the ~60 conflicts burning across the planet – the most since World War II. It will be the United States. That's the throughline of [Eurasia Group's Top Risks 2026 report](#): the world's most powerful country, the same one that built and led the postwar global order, is now itself actively unwinding it, led by a president more committed to and more capable of reshaping America's role in the world than any in modern history.

Last weekend offered a preview. After months of escalating pressure – sanctions, a massive naval deployment, a full oil blockade – US special forces captured Venezuelan strongman Nicolás Maduro in Caracas and flew him to New York City to face criminal charges. A dictator removed and brought to justice with no American casualties, it was President Donald Trump's cleanest military win on the global stage.

Trump has already branded his approach to the Western Hemisphere the "Donroe Doctrine." It's his version of President James Monroe's 19th-century assertion of American primacy in the Americas – except where Monroe warned European powers to stay out of America's neighborhood, Trump is using military pressure, economic coercion, and personal score-settling to bend the region to his will. And he's just getting started.

"America First" isolationism, this is not. The United States is simultaneously growing more, not less, entangled with Israel and Gulf states. Trump's willingness to strike Iran last year and meddle in European politics doesn't exactly scream retrenchment. The "spheres of influence" frame doesn't fit either. Trump isn't carving up the world with rival powers, each staying in their lane. Washington just sent Taiwan its largest-ever arms package, and the administration's Indo-Pacific posture does not evince a desire to cede Asia to China.

Trump's foreign policy doesn't run on traditional axes – allies versus adversaries, democracies versus autocracies, strategic competition versus cooperation. It runs on a simpler calculus: Can you hit back hard enough to hurt him? If the answer is no, and you have something he wants, you're a target. If it's yes, he'll cut a deal.

Trump wanted Maduro gone, and there was nothing Maduro could do to stop him. He had no allies willing to act, no military capable of retaliating, no leverage over anything Trump cared about. So he was removed. Never mind that Venezuela's entire regime structure remains intact, and any transition to a stable democratic government will be messy, contested, and largely Venezuela's to manage (or mismanage). Trump is personally content with Venezuela continuing to be run by the same repressive regime, as long as it agrees to do his bidding (indeed, he chose this arrangement over an opposition-led government). The threat of the "or else" appears to be working already, with Trump announcing that Venezuela's new authorities will hand over 30-50 million barrels of oil to the United States, with the proceeds – his words – "controlled by me, as President." Continued success in Venezuela, however narrowly defined, will embolden the president to double down

on this approach and push further – whether in Cuba, Colombia, Nicaragua, Mexico, or Greenland.

On the other end of the spectrum is China. When Trump escalated tariffs last year, Beijing retaliated with export restrictions on rare earths and critical minerals – essential ingredients for a broad range of 21st-century consumer and military products. The vulnerability exposed, Trump was forced to back down. Now he's intent on keeping the détente and securing a deal at all costs.

This is the law of the jungle, not grand strategy: unilateral power exercised wherever Trump thinks he can get away with it, uncoupled from the norms, bureaucratic processes, alliance structures, and multilateral institutions that once gave it legitimacy. As constraints tighten elsewhere – voters angry about affordability, midterm losses looming, trade leverage shrinking – and his urgency to cement his legacy sharpens, the president's willingness to take risks on the security side, where he remains largely unconstrained, will grow. The Western Hemisphere just so happens to be an especially prey-rich habitat, where the United States has asymmetric leverage no one can counter and Trump can score easy wins with minimal pushback and costs. But America's immediate neighborhood is not the limit of Trump's approach.

If it wasn't already clear, the administration's threats to Greenland clarify that Europe is now part of America's target set. The UK, France, and Germany, the continent's three largest economies, all enter the year with weak, unpopular governments besieged by populists, Russia at their doorstep, and an American administration openly backing the far right that would further fragment the continent. Unless Europeans find ways to gain leverage and credibly impose costs Trump cares about – and soon – they will face the same squeeze he's applying across the hemisphere.

For most countries, responding to an unpredictable, unreliable, and dangerous United States is now an urgent geopolitical endeavor. Some will fail; Europe may be too late to adapt. Some will succeed; China is already in a stronger position, content to let its chief rival undermine

itself and win by default. Xi Jinping can afford to play the long game. He will be in power long after Trump's term ends in 2029.

The damage to American power itself will persist past this administration. Alliances, partnerships, and credibility aren't just nice to have – they are force multipliers, giving Washington leverage that raw military and economic power alone couldn't have sustained. Trump is burning through that inheritance, treating it as constraint rather than asset, governing as though American power operates outside of time and he can reshape the world by force without lasting consequence. But the alliances he's shredding won't snap back when the next president takes office. The credibility takes a generation to rebuild – if it can be rebuilt at all.

So yes, 2026 is a tipping point year. Not because we'll know how this ends, but because we'll start to see what happens when the country that wrote the rules decides it no longer wants to play by them.