

Thoughts on Coming Apart and the Coming Great Reset



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

Kit Webster

Squaring the Circle

January 10, 2025

Themes and Theses - Why I'm Contemplating Out Loud

(Initially formulated in the early 90s, following decades of reading history, philosophy, 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 not yet to the middle 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.

(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 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 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.

Quotes to Contemplate

The opinion of 10,000 men is of no value if none of them knows anything about the subject - Marcus Aurelius

If you think what Meta/Facebook allows is bad, wait until you hear about the U.S. Constitution - Michael Shellenberger

> Primary Ideas in This Week's Post

The next century will see dramatic changes in demographics and consumption patterns around the world.

The precedents set by several previous presidents and amplified by Biden will be corrosive to our democracy and social stability.

Speaking of which, a senator has stated that Trump has prepared approximately 100 executive orders. Fasten your seatbelts as he massively moves past Biden in the use of arbitrary power.

The dumbing down of our culture is reaching its level of absurdity as prospective teachers in New Jersey do not have to pass proficiency tests for reading, writing and math.

> Squaring the Circle

"The test of a first-rate intelligence is the ability to hold two opposed ideas in the mind at the same time, and still retain the ability to function." - F. Scott Fitzgerald

I wrote a book that discussed the degradation of the environment and natural resources due to overpopulation - actually overconsumption, which is a function of overpopulation.

Last week, I wrote an article about how the human race was making itself extinct due to not producing enough babies.

Let's contemplate how to square that circle.

First, some statistics:

Current world population - 8 billion

Peak world population - UN medium case - 10.2 billion in the mid-2080s.

Underneath the covers, a lot is going on.

Birth rates are decreasing everywhere.

Birth rates are staying above replacement, primarily in Africa and the Middle East.

Between now and 2100:

- India's population is projected to grow, but not by much. It will remain the most populous country.
- Even though China's population will more than halve, it will remain the second most populous country.

- Then come Pakistan, Nigeria, the Congo, the USA, which will increase primarily because of immigration, Ethiopia, Indonesia, Tanzania, and Bangladesh.

Other interesting statistics:

The UK's population is projected to not quite halve; Japan's will decrease by about 40%; Germany's by about 10%; South Korea by 60%.

From a consumption perspective, the fact that the West is generally decreasing in population should reduce its burden on resources, depending, of course, on the resource demands of new technologies (eg, AI's voracious demand for electricity). Every migrant from the third world to the first increases their, and particularly their second generation's, propensity to consume by maybe a factor of 10. The increased populations in Africa and the Middle East will demand water, meat, cars, etc, so that their consumption will begin a dramatic increase.

It is difficult to net out all of these significant crosscurrents to understand the impacts on resources.

My guess is that water will be an increasing concern, particularly locally, like China, India and the US West.

My guess is that energy will continue to be a significant challenge, particularly if the focus on green energy continues. Nuclear fission can help, but probably only beginning a long period of buildout in the 2030s.

It appears that our ability to produce food is reaching a limit, but that is not clear.

The bottom line is that human demographics are in the midst of dramatic change, including a probable peak in about 60 years. Current levels of population and consumption are straining existing resources.

The next few decades will include the challenge of innovating in order to continue to improve standards of living.

Markets

[Updated Charts](#)

> No change in outlook.

> What, Me Worry? About \$8 trillion of our \$36 trillion national debt is due in 2025. Plus new budget deficit debt of \$2 trillion. \$10 trillion in debt needs to find buyers during 2025. Gradually and then suddenly.

> Bless her heart, Yellen did it again. "I hope the new administration will take the deficit seriously."

Ben Hunt and the Great Ravine

Ben Hunt and Rusty Guinn have done wonderful, sometimes brilliant, work on their Epsilon Theory website.

They are now noticing, thinking and writing about similar thoughts to mine.

They have created the concept of the Great Ravine, which in my adopted parlance is the descent into the Fourth Turning and then the rise in the First Turning. After having written a few thoughts on the subject, they have created a magnum opus, *The Four Horsemen of the Great Ravine*. It begins:

Every so often, things fall apart. Every so often, human society collapses into violence both economic and kinetic, both largescale and small-scale, a war of all against all where life is nasty, brutish and short. I can't shake the feeling that we are beginning just such a descent, a winding but one-way path down, down, down into what my favorite living author, Chinese science fiction writer Liu Cixin, calls the Great Ravine. Maybe it's just the grumpy old man coming out in me, but I've always believed that there is a process and a pattern and a lifecycle to any human society. I've always believed that part of that lifecycle is decline and collapse. I've always believed that there would be recognizable signs and portents for that final stage, signs and portents that I think I'm seeing now. It's not that I think history repeats itself, but I definitely think it rhymes. And if I'm right, if we are today starting down a well-trod human path to social collapse, then there's nothing more important than figuring out the rhyme of history.

I am very excited that they are putting their intellectual firepower behind the subject.

So, You Say You Want A Revolution?

> Now that Biden is stepping down, there is some truth-telling going on -

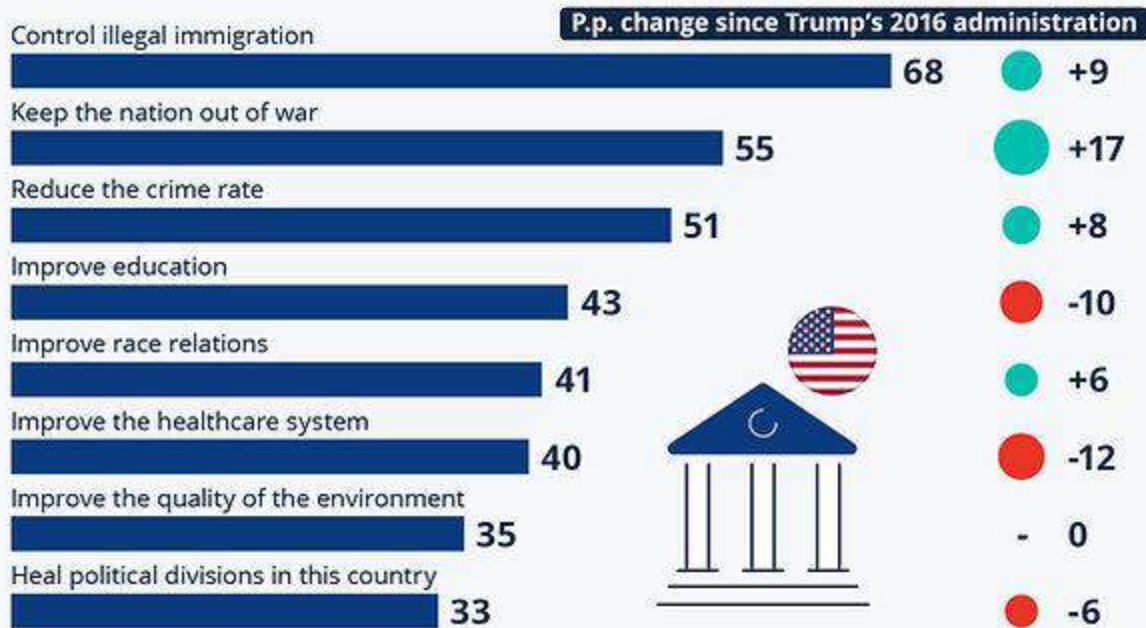
"The border was not Biden's finest moment, frankly," former Obama administration official Steve Rattner sheepishly admits while showing the dramatic chart, shocking his co-host on MSNBC's Morning Joe by admitting that: "you can see what happened here and Trump is not wrong when he talks about how border crossings were quite low."

"They were running about 74,000 a month when he left office. And they, in fact, did shoot up. Some of it was some things Biden said and some ways that they put a moratorium, for example, on deportations."

"But in fact, we did get up here almost to 300,000 a month," Rattner continued.

What Americans Expect From the New Trump Era

Share of respondents who said the 2nd Trump administration will be able to do the following (in %)



1,000+ respondents (18+ y/o) in the U.S. surveyed Nov. 10-11, 2016 and Dec. 2-18, 2024
Source: Gallup



- > So, it begins - Trump announces plans to immediately overturn Joe Biden's prohibition on new offshore drilling projects once he takes office. Because of prior court rulings, he will actually have a difficult time. It may be doable, but will take an act of Congress or a ruling by the Supreme Court. If you haven't figured it out by now, I cannot begin to describe how destructive these actions by Biden are in terms of setting precedents for the future - regardless of whether you agree with them in principle. Just terrible. Wags are calling this Biden's "Dark Brandon" phase.
- > The Gulf of Mexico will become the Gulf of America?
- > Donald Trump Jr visited Greenland. He encountered some Greenlanders wearing MAGA hats.

- > Trump indicated that he would like to see no new wind projects built during his term as president.
- > A shift in the Zeitgeist - the Golden Globes came off with essentially no politics.
- > The US House of Representatives on Tuesday passed the Laken Riley Act mandating the detention of undocumented immigrants accused of certain minor crimes by a margin of 264-159. It had bipartisan support, with 48 Democrats voting for the bill, as the party faces pressure to toughen up on immigration.
- > Trump repeated - if those hostages aren't back by the time I get into office, all hell will break out in the Middle East.
- > Biden is doubling down on his extraordinarily destructive precedents as he trashes the place as he goes out the door. Hell hath no fury like an octogenarian scorned. - Biden told *USA Today* that he still might issue pre-emptive pardons for political figures Trump has attacked.
- > *The Atlantic* has turned on Biden. Two articles on the website - "Biden's unpardonable hypocrisy" and "How Biden made a mess of Ukraine."
- > The Supreme Court turned down Trump's appeal against sentencing for his misuse of funds indictments in New York. That trial was clearly lawfare that never should have occurred, but it did, Trump was convicted, and sentencing occurred today. The judge ruled no jail time, no probation and no fines.
- > Although Special Counsel Jack Smith has dropped charges against Trump in the two federal cases, he is required to report to the Attorney General on the case and a court has ruled that it can be released to the public. If it is, there are likely to be juicy tidbits.
- > I have extensively discussed how we are increasingly ruled by executive orders. A senator has indicated that Trump has prepared about 100 for his return to office. This is going to be quite a show.
- > Trump - I'm going to give you a report on drones about one day into the administration. Because I think it's ridiculous that they're not telling you about what's going on with the drones.

Short Takes

- > I'm not sure we have yet reached maximum absurdity, but you can see it from here
-
- New Jersey Democratic Governor Phil Murphy passed Act 1669 as part of the state's 2025 budget in June to address a teacher shortage, Read Lion reports. The law went into effect on Jan. 1, 2025. Individuals seeking an instructional certificate will no longer need to pass the Praxis Core Test, a basic skills test for reading, writing, and math that is administered by the state's Commissioner of Education.

'We need more teachers,' Democratic Sen. Jim Beach, who sponsored the bill, said in May 2024 when the chamber cleared the bill in a 34-2 vote. 'This is the best way to get them.'

> Ian Bremmer has put out his list of top risks for 2025. Most of these risk lists are either obvious or useless, but Bremmer is well-versed and thoughtful from a mildly liberal perspective, so his list is worth at least a review. I have included it at the bottom of this post. See the details [here](#).

> Robotaxis are reaching critical mass. Watch for significant growth in the near future. There are still glitches that need to be ironed out.

> The U.S. government on Tuesday issued new rules to remove roughly \$49 billion in unpaid medical debts from Americans' credit reports. This stupidity renders many credit reports essentially useless and makes establishing creditworthiness more difficult for everyone. Just as student debt is no different from other debt, medical debt is no different than other debt. But, reality doesn't matter when you can make political / emotional points. Buying votes is serious business and we seem to be in the middle of an epidemic.

> Indonesia joined the BRICS, which now consists of Brazil, Russia, India, China, Iran, Egypt, Ethiopia, and the United Arab Emirates.

The songs of my formative years - Peter Yarrow of Peter, Paul and Mary died. I last wrote about them when Mary died. Beth and I saw them on their last tour - Mary looked bad as she was dying from leukemia and her voice was not what it was. (Beth and I indulged each other in our different musical tastes - that was one Beth took for the team.) I was not a big, *Puff the Magic Dragon* fan, but *The House Song*, Paul's *The Wedding Song*, *Bob Dylan's Dream*, *Early Morning Rain* ... those were/are big. They are all gone now, the first artists I liked on 78s and 45s - Roy Orbison, The Kingston Trio, Harry Belafonte, Johnny Mathis, Glen Yarborough, Elvis (Paul Stookey is still alive). The ones that came later, the ones on 33s, many of them are still around.

> (From *The Morning Dispatch*) - Derek Thompson offered an in-depth exploration in *The Atlantic* of the alarming anti-social trends of the 21st century. "Eroding companionship can be seen in numerous odd and depressing facts of American life today," he wrote. "Men who watch television now spend seven hours in front of the TV for every hour they spend hanging out with somebody outside their home. The typical female pet owner spends more time actively engaged with her pet than she spends in face-to-face contact with friends of her own species. Since the early 2000s, the amount of time that Americans say they spend helping or caring for people outside their nuclear family has declined by more than a third. ... The real problem here, the nature of America's social crisis, is that most Americans don't seem to be reacting to the biological cue to spend more time with other people. Their solitude levels are surging while many measures of loneliness are actually flat or dropping."

And, you think we have problems - (I roughly calculated the arrest rates in the US off of 2018 FBI data. - 21 white arrests per 1,000 whites and 48 black arrests per 1,000 blacks (Hispanics were not a separate category, so they show up as (mostly) white and some black).)

The moral to all of this is, don't mess with Albanians (who are mostly white). Here are the arrest rates for different nationalities in the UK, adjusted for their various populations:

Brits 12 arrests per 1,000 people

Somalis 64.6 per 1,000 people

Moroccans 70 per 1,000 people

Algerians 72.7 per 1,000 people

Iraqis 92.9 per 1,000 people

Afghans 106.9 per 1,000 people

Albanians 209.8 per 1,000 people

> Social Security is going broke, so, of course Biden signed a bipartisan bill increasing payments to some people. Reality aversion is a serious problem. Buying votes is important.

Uh-oh. *US News* - Humans may be fueling global warming by breathing: new study.

> The LA fires are a tragedy and there will be a lot of unpacking to do. I have ignored a lot of the DEI stuff because it sounds like axe-grinding. I think DEI is leading to a lot of bad hires, but it is not clear that the LA Fire Department actually made bad hires, even though DEI was a focus. Just because someone is black or LBGQTQ does not mean they are not qualified (or that if they are white, they are qualified). Then I saw an interview with Assistant Chief Kristine Larson in which she said that people should be saved by those "who look like them." Larson, who is a big person and black, also said that (she) could not carry a man to safety, but the man should not have gotten into trouble in the first place. Ok, bad DEI hire. Not even clear where they find these people, since there are qualified blacks and LBGQTQ.

> In an interesting twist, LA's Deputy Mayor for Safety has been associated with a bomb threat.

> A federal judge ruled against Biden's attempt to include gender under Title IX. This was one of Biden's I-know-this-is-wrong-but-I'm-going-to-do-it-and-get-style-points-and-maybe-even-get-it-through actions. My guess is that Trump will carry on the tradition. Buying votes is important.

> 2024 was the hottest year on record (back to the 1880s). 2025 may not exceed it due to a La Nina.

> The people of Maui and Western North Carolina will feel better - Biden: "I'm announcing that the federal government will cover 100% of the cost of measures to protect lives and property in Southern California for six months."

Miscellany

White supremacy is slipping away ...

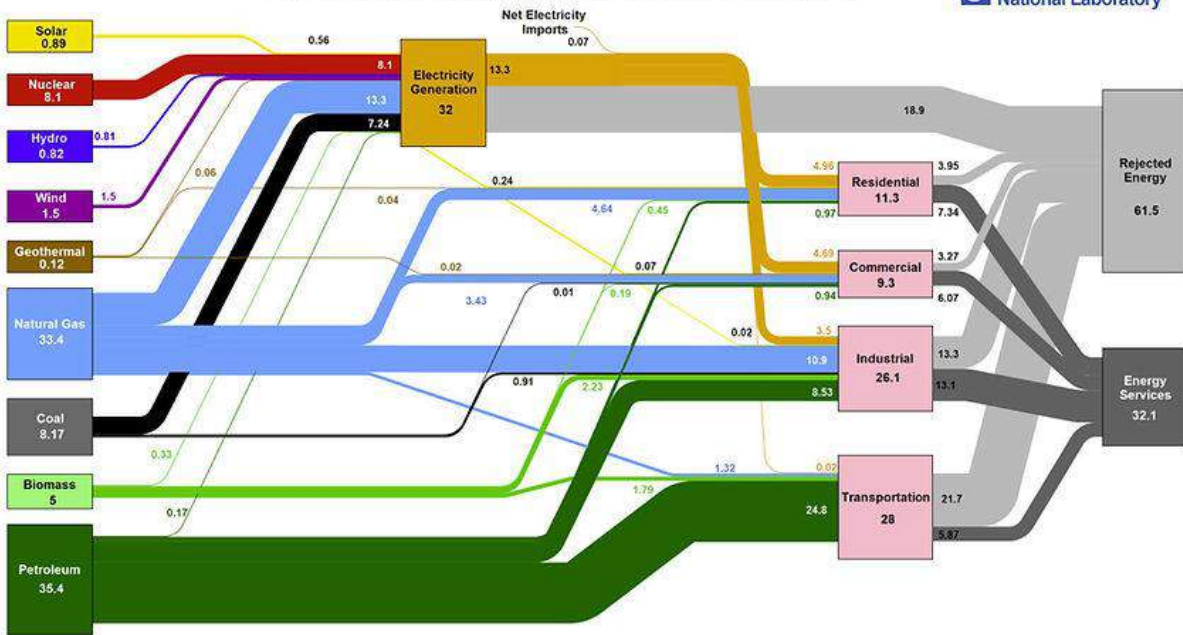
Median Household Income in the United States by Ethnic Group



Source: US Census Bureau, 2013-15 American Community Survey | equitablegrowth

Estimated U.S. Energy Consumption in 2023: 93.6 Quads

Lawrence Livermore National Laboratory



Source: EIA, October, 2024. Data is based on DOE/EIA 2023 (2023). If this information or a reproduction of it is used, credit must be given to the Lawrence Livermore National Laboratory and the Department of Energy, under whose auspices the work was performed. Distributed electricity represents only retail electricity sales and does not include self-generation. EIA reports consumption of renewable resources (i.e., hydro, wind, geothermal and solar) for electricity in BTU-equivalent values by applying a typical fossil fuel plant heat rate. The efficiency of electricity production is calculated as the total retail electricity delivered divided by the primary energy input into electricity generation. Heat use efficiency is estimated as 45% for the residential sector, 45% for the commercial sector, 45% for the industrial sector, and 21% for the transportation sector. Totals may not equal sum of components due to independent rounding. LLNL-MI-410227



The Babylon Bee @TheBabylonBee · 13m

'It's Too Expensive To Have Kids,' Says Woman Whose Ancestors Raised 11 Kids In A Two-Bedroom House

buff.ly/3W8XdaG



Bremmer's Risks for 2025

Risk 1: The G-Zero wins

We're entering a uniquely dangerous period of world history on par with the 1930s and the early Cold War.

Risk 2: Rule of Don

The erosion of independent checks on executive power and the rule of law will increase the extent to which the US policy landscape depends on the decisions of one powerful man.

Risk 3: US-China breakdown

Trump's return to office will unleash an unmanaged decoupling in the world's most important geopolitical relationship.

Risk 4: Trumponomics

Donald Trump is about to inherit a robust US economy, but his policies will undermine its strength this year through higher inflation and reduced growth.

Risk 5: Russia still rogue

Russia will do more than any other country to subvert the global order in 2025.

Risk 6: Iran on the ropes

The Middle East will remain a combustible environment in 2025, for one big reason: Iran hasn't been this weak in decades.

Risk 7: Beggar thy world

The US and China will export disruption to everyone else this year, short-circuiting the global economic recovery and accelerating geoeconomic fragmentation.

Risk 8: AI unbound

As most governments opt for lighter-touch regulation and international cooperation falters, AI capabilities and risks will continue to grow unchecked.

Risk 9: Ungoverned spaces

The deepening G-Zero will leave many people, places, and spaces thinly governed and forgotten.

Risk 10: Mexican standoff

Mexico will face formidable challenges this year in its relations with the US at a time of ongoing constitutional overhauls and fiscal stresses at home.

Red Herrings

Trump fails. Europe breaks. The global energy transition stalls.