

Thoughts on Coming Apart and the Coming Great Reset



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

Kit Webster

August 9, 2024

**Transgenders, Olympic Boxers and the Rich World Problem
of Outliers
and
The Ascension of China; The Decline of the US**

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. In the end, this is a relatively straightforward story about human nature and history rhyming.)

The US will enter a period of crisis in the early 2000s. In the late 90s, I took up 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.

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.

For a man hears what he wants to hear
And disregards the rest -
Paul Simon

Perhaps the world's greatest debtor can't remain the world's greatest super power. It's a 1938 like moment and that coupled with the complexity of our internal challenges makes this a very, very serious moment. - Lawrence Summers

Repeatedly over the last two decades, central banks have attempted to take the difficult but necessary steps to deal with economic and financial imbalances only to fold under market pressure. The more often they concede, the higher the moral hazard and the greater they have empowered markets to demand policy changes that favor them immediately even when in conflict with the requirements of economic health. And the longer this goes on, the greater the underlying economic vulnerabilities and the larger the risk of unsettling financial instability. - Mohamed El-Erian

If liberty means anything at all it means the right to tell people what they do not want to hear. - George Orwell

Key Thoughts For This Week

IF YOU COME AWAY WITH ONLY ONE THOUGHT, LET IT BE -
THE US IS RUNNING A TWO TRILLION DOLLAR A YEAR DEFICIT AT FULL
EMPLOYMENT

There is no resolution, yet, as to whether the quick downturn at the first of the week was a blip or the beginning of something larger.

One in a row is not that significant, but the most recent bond auction did not go well. Things are starting to shake everywhere.

AI 1.0 has just about peaked. We have gotten almost all that we can get out of LLMs. Many will be disappointed and much money lost.

Have no fear. AI 2.0 is out there in several years.

The discussions over transgender and the xy hormonally-challenged ultimately comes down to who suffers.

China has us by the balls.

It is surreal for one-third of us to be bat-shit crazy about a ticket containing the least popular VP in history and the third guy from the left, and one-third of us to be bat-shit crazy about a real estate mogul who has essentially no principles and another third guy from the left. *Alice in Wonderland* can't compete and I am in awe.

Kamala is not a communist, but in her heart she is a radical. If she wins, much depends on the makeup of Congress.

There is the chance that Biden steps down by end of September to give Kamala another 'honeymoon' going into the election.

The first signs of the coming energy crisis have cropped up with electric supply instability.

A new report from the House Judiciary Committee finds that at least 99 illegal migrants on the terror watch list have been released into the United States between 2021 and 2023.

Abortion was slightly more common across the U.S. in the first three months of this year than it was before the Supreme Court overturned *Roe v. Wade*

Markets

[Updated Charts](#)

> IF YOU COME AWAY WITH ONLY ONE THOUGHT, LET IT BE -
THE US IS RUNNING A TWO TRILLION DOLLAR A YEAR DEFICIT AT FULL
EMPLOYMENT

> No change in outlook. There is no resolution, yet, as to whether the quick downturn at the first of the week was a blip or the beginning of something larger.

- > My base case for a while has been, and still is, a significant economic turn-down, perhaps a recession, followed by an inflationary boom. However, with the turndown in the stock markets, the world has moved from everyone saying soft landing or no landing to now talking about recession. I'm uncomfortable with that much company.
- > One in a row is not that significant, but the most recent bond auction did not go well. Things are starting to shake everywhere. Increases the downside of decreasing interest rates.
- > Disney said that it expects continued softening of demand at its US theme parks.
- > AI 1.0 has just about peaked. We have gotten almost all that we can get out of LLMs. Many will be disappointed and much money lost. Have no fear. AI 2.0 is out there in several years.
- > Louis Vincent Gave is always worth listening to - [MacroVoices](#).

> Transgenders, Olympic Boxers and the Rich World Problem of Outliers

(Warning - endless oversimplifications to make points.)

So, you are an ancient society and someone is born deformed - you just leave them out in the elements to die. Often you do that because they are female.

You are in a preindustrial society and someone is handicapped - you and your family and religious institutions dealt with it.

You are an ancient society and someone is mentally ill. Things get more complicated. Mentally ill people in some societies were thought to have special access to gods. In some societies you were locked up in asylums. Otherwise, see handicapped.

You are gay or effeminate or trans in traditional societies and some modern societies. Depending on their religion and culture, it ranged from all-is-ok to being cast out of society or killed.

In Roman society, there were citizens, slaves and others. Race just did not matter that much - slaves were mostly white.

Fast forward to today. We live in an all-men-are-created-equal culture that is rich enough to invest in outliers.

Good for us.

Only, in a world that is dominated by, say, two genders, what do you do when non-standard people pop up?

The handicapped popped up and we were rich enough to build ramps and radically change physical access. Women popped up and we made them equal. Blacks popped up and we made them equal. Gays popped up and we made them equal.

Trans pop up and ... How do you fit a square peg into a round hole? When transgender "women" want to use the "women's" bathroom and compete in "women's" sport?

When people with XY chromosomes who are not classic males want to box women in the Olympics (this is not strictly a trans issue)?

Spoiler alert, there is no good answer. Somebody suffers and we just have to decide who that is.

Maybe 2% of people are trans, which I will, perhaps uncharitably, call psychological outliers, and an infinitesimal number of people are genetic outliers. Do we torque the entire system, including concepts of danger and privacy and fairness for just a few people?

I'm not wise enough to adjudicate these things.

No system can handle every corner case. No system can handle every category of outliers.

There are endless philosophical discussions of the "right" way to live.

On the one hand, there is utilitarianism that basically says you do whatever's the greatest good for the most people. That's the underlying principle of our democracy, albeit with support for those who are left out.

On the other hand, there is the following thought, Rawls' "veil of ignorance:" you are a baby about to be born into the world. You do not know whether you will be white or black; straight, gay or trans; rich or poor; American or Sudanese; have your hormones intact or not; whole or handicapped. You have the ability to define the social system that you want to be born into, not knowing essentially who you are. What do you choose? You could be trans. You could be an Olympic athlete that has sacrificed their entire lives to reach their Olympic moment only to find an xy chromosome in the ring with them. How do you make it work? What do you choose? (Unfortunately, I am not aware of a modern culture that would be particularly accepting of trans. If you are trans, you have to make up a new one before being born, or maybe wait a while and see how things settle out in the West, particularly the US.)

It is clear that disrupting the entire culture for 2% of the population is, what, crazy? Women were 50%; blacks were 12%. Things might have gotten a little iffy from a utilitarian perspective with gays at 5%, but the actual consequences of integrating gays were minor.

It is also clear that trans and hormonally different people are humans that deserve respect.

And, there we are.

You cannot fit a square peg into a round hole. You either have to change the shape of the hole or move on.

The price you pay is transgender story hour and people with xy chromosomes - both transgender and those with disorders of sex development - dominating women's sports and women feeling unsafe in bathrooms.

We as a culture have to make that decision.

I can't wait to see if there is a good answer, but I do not see one. There are many problems without solutions, these are included in that group.

(Great article on disorders of sex development - the Olympic boxers' issue - [here](#).)

Roger Pielke Jr, a person I respect, in a Substack subtitled, "Why science alone cannot resolve debates over who is a "real" woman," begins his article with the following:

- Though not typical, there are XY females and XX males from birth. No sport scientist or medical professional disagrees with this. Some XY women have [given birth](#);
- The issue in sport is about the possibility of an unfair performance advantage that women with certain biological characteristics may have over other women without those characteristics;
- Thus, for many (probably not all), chromosomal sex testing is not about identity — who is a “real” or “pure” woman? — rather, it is about screening women to identify the subset who may have an unfair performance advantage, and thus are subject to regulation;
- We must admit that some wish to redefine certain women as men, or to conflate these issues with those of trans athletes. “Sex testing” in sport has a truly ugly history. Keeping focus can thus be challenging;
- Chromosomal sex testing was used in Olympic sport from the 1970s through the 1990s. It was a dismal failure and caused harm to many women. It was abandoned with overwhelming support from the medical establishment and sports organizations, including the IOC.
- Above all, no one should criticize any athlete who is following the rules that s/he encounters in their sport. Debating rules in sport is common and where our attention should be focused on this issue as well — not on individuals following those rules.

(As a postscript, both women competitors with xy chromosomes won gold medals.)

> **The Ascension of China; The Decline of the US**

I've discussed this dynamic off and on over the years. SS, who thinks about this much more deeply than I do, has continued his thoughts, which have triggered me to post about it again.

To be direct, China has us by the balls.

First, it is awkward to confront a country on which you rely for the manufacture of key weapons components. .

Next, it is difficult to confront a country that makes many of the pharmaceuticals on which we rely.

Next, even for the things you can make, you do not have sufficient capacity to support a war. The US was the "arsenal of democracy," supplying our side, including the USSR, with weapons and material. Today, we are hard pressed to support even Ukraine at a lower level than they need. SS estimates that the effective Chinese manufacturing sector is twice that of the US.

Next, we do not do war very well. We are big and menacing, but, except for Granada, we have not won a war since World War II.

Attacking the Chinese mainland is simply a nonstarter.

Then there's Taiwan.

My view has been that China will not invade Taiwan. Sooner or later, Taiwan will simply be informally absorbed into China without a shot being fired.

SS disagrees, and he makes a good point.

Xi is 71. He wants to go down in history as the guy who unifies China. He may be willing to take the isolation from the West that would follow an invasion. (It is not clear to either me or SS that the US can even defend Taiwan in the first place. It is also not clear that the West would stand in solidarity against China.)

SS indicates that, based on his research on war cycles, a confrontation with China should be coming soon.

It's not all roses with China. They have a debt problem similar to or perhaps worse than that of the US. Of course they have a stronger real economy.

Their demographics are terrible and their population is in decline. However, for the next decade, at a minimum, they will be fully capable of functioning.

They have to import food and oil. Although they are building strategic reserves of essential goods, they are vulnerable to the severing of the trade routes, primarily in the South China Sea.

And, the US military is not in great shape. DT, who is not a subscriber to these posts, but is in a small group that includes SS and me, stated the following, which I think contains some good points: "These days, much of the leadership is all about careerism, in accord with the latest DEI blatherscathe from inside the Beltway. From my observations and experiences, many of the troops are on the edge of mutiny, and there is a good deal of incompetence being papered over all over the place. Call them out for under performance, and they hammer you with racism and sexism and whatever ism is the latest in thing today. Most officers just keep their mouths shut,

and tolerate substandard, insubordinate performance. Well, you can get away with that stuff in a 9 to 5 air conditioned office. But when the stuff hits the fan blades in real life conflict, folks die and get injured, because they can't do the job, because they weren't held to high standards so they can perform under stress." The military is not immune to the larger forces in our society.

The US is also not taking the steps to improve the situation. SS: "The US as a nation doesn't care about the development of the soft support, engineering etc., needed for an industrialized society, we farm that out anymore to people from "cheaper" places. Mexico for example at 1/3 the population of the US now graduates from its colleges and universities MORE engineers yearly than the US does. If the US wasn't importing engineers en-mass from India and other countries from around the world we wouldn't have the soft technology base to support even our reduced manufacturing capability. Ditto in almost every science field, as shown by who populates our university MA and Phd science programs ... majority foreigners. We now import people from all over the world in the entire STEM arena, we do not internally generate even 1/2 of those we are teaching in our University graduate programs. (look at the field of medicine ... how many Doctors do you run into now who are NOT from the United States but came from elsewhere?"

Where does all of this leave us?

In decline, with an A for political correctness and Cs and Ds for preparedness, economic vitality and strength of our institutions.

We are left to hope that China continues to play the long game. A shorter-term engagement would have the potential to be devastating. Perhaps for both of us. For a while, we have to find a way to just get along.

Lyn Alden on X

And sure, people can theorize about what aerospace systems major militaries have on standby if needed. Meanwhile though, they can't even keep the Red Sea safe and open for ships, against cheap drones, leading people to wonder how much of the tiger might be paper.

(Kit) Aircraft carriers are impressive, but not suited for actual modern warfare.

Metaphorically, some kid in Yemen with a drone or handheld missile will sink one, one day

Short Takes

> Perspective

John Mauldin points out that at this time in 1988, Dukakis was leading in the presidential election polls by 18 points.

The much more important point is that he lost it all essentially overnight, primarily by appearing in a tank. We didn't make serious election decisions back then, either.



> The question of, who is running the country, resurfaced after Biden's calendar last week included, in its entirety, two phone calls and a vacation in Delaware. When Xi or Putin calls or Hezbollah bombs Israel, who answers the phone?

> A perfect metaphor -

If you have been watching the Olympics, there are rituals at the medals ceremonies. National anthem, everybody gets on the top level for a smiling joint picture and athletes bite their gold medals to demonstrate they are pure gold.

The gold medals are 1% gold.

The ritual continues long after reality has moved on, is performative and has no meaning (but I am good with it - just like the metaphor). There was a great video of a young Chinese medalist who was not up to speed on all of this. She looked at her co-medalists biting their medals, had a quizzical look on her face, and bit her medal.

>Kamala things -

The race is now an all-around toss-up or, more probably, Kamala has inched ahead. Nate Silver, my hold-out last week, now also has it as toss-up. It's unanimous. As I discussed a couple of weeks ago, this is to be expected given Kamal's newness and the

upbeat reaction to Joe's bowing out, We need to check back in September to see how things are settling out.

The pronunciation of Kamala's name is now the equivalent of the pronoun wars. So, be careful, because if you do it wrong, you are a racist bigot. (Health tip: as best I understand, it is comma-la).

Kamala took up some black dialog when speaking in Atlanta and then again at another speech, creating endless memes about Hillary's teaching her black pronunciation.

(Honest question, whatever happened to ebonics?)

Conventional wisdom is that Kamala handles interviews badly. There is now betting on how many interviews and press conferences she will appear in. (She has promised one "by the end of the month.")

Tim Walz, Minnesota's governor, is Kamala's VP pick. Eh. I did think that it was all but impossible for Kamala to pick Shapiro, a Jew, in the midst of all the Palestinian turmoil. Too bad. Shapiro is the governor of Pennsylvania, which may be THE key to the presidential election. Walz seems like a down-home, pretty-left-leaning guy. If you ignore his politics, he seems kinda plain - nothing interesting, but nothing bad, either. His handling of the George Floyd riots seems to be the major bone of contention. Another potential issue is the hotline he set up for people to report violations of Covid distancing guidelines, which carried a \$1,000 fine or 90 days in jail. As Kamala tacks right on some issues, she picks a far-lefty as a running mate. Check the bottom of this post for *The New York Times'* take. In another article, they talk about his enthusiasm for all things green. There is one thing seriously wrong with him - he owns no stock.

When I asked myself how the reaction in the press or among Democrats would have been different if Kamala had chosen someone else, I answered, not much. Everybody is all in for what's-his-name. Hooray for (your name here). We will carp about cat ladies and Walz's actual military record or views on free speech, but in the end, it will not matter much. Just more 24/7 filler for time and space, with approximately 4 votes in the balance.

> Trump things -

When I was referencing Kamala's energetic flip-flopping last week, I failed to be fair and note that Trump has elevated flip-flopping to a fine art. Kamala is flip-flopping as a political move to gain more voters - consistency and honesty are not required of politicians, and Kamala is presenting a master class. Trump is flip-flopping because it's Tuesday - consistency and honesty are not required of politicians and no one even expects it from Trump. As Jonah Goldberg notes, this will not be an issues election (do we actually have those?), it will be a vibes election. (Kit) Donald and Kamala, whatever you do, stay away from tanks.

Trump says markets are tanking over the prospect of Kamala. I doubt that - I have predicted this prior to Kamala's rising. But I do think that "the markets," on the whole,

would prefer Trump. For better and for worse, in her heart, Kamala is very leftist to the point of being woke-adjacent. She is not THE reason markets tanked - it was more about the unwinding of the yen carry trade, but her candidacy is not reassuring in this regard. Other than taxing the rich, including a wealth tax, she has no stated economic policy. Watch the markets when and if it becomes clear she is going to win for a good signal. (Trump will continue spending, but Kamala will likely be more motivated.) Damn, things get complicated. Jim Cramer said to vote for Trump "if you care about your paycheck." Trump is probably doomed.

> I really hate myself for this, but I mentioned last time how it is claimed that Kamala "knows science" because her mother was a biomedical scientist. Here is a [video](#) of Kamala and the "cloud, up there above us." The *Bee* followed up with Kamala Harris Spends Flight Looking for Cloud Where Her Data Is Stored.

> It sounds like a cliché, but it is serious and something I will carefully consider at the proper time. Kamala is being called a "communist." That sounds like a platitude until you listen to her speeches on equal outcomes. She is tacking to the right and will likely never mention it during the campaign, but, it is a part of her philosophy.

Now, she would never consider herself as a communist, and equal outcomes is only one part of what communism is all about. However, she is radical.- yes, she's green and into all the gender stuff, but green is a necessary discussion, whether you agree with her or not, and the gender thing will pass.

How much power she would wield as president depends on the makeup of Congress. If Congress is divided, she will likely do the Trump-Biden thing and issue executive orders she hopes can get through the courts. If she has a majority in Congress, our country could begin to change even more radically.

I expected a move to the left in our politics, and pendulums (pendula?) swing, so most of this is normal.

She is beyond anything I contemplated until the (man) on a white horse.

> This makes a lot of sense -

Chance that Biden steps down by end of September to give Kamala another 'honeymoon' going to into the election

> I keep repeating myself because it is surreal for one-third of us to be bat-shit crazy about a ticket containing the least popular VP in history and the third guy from the left, and one-third of us to be bat-shit crazy about a real estate mogul who has essentially no principles and another third guy from the left. *Alice in Wonderland* can't compete and I am in awe.

> The BBC has come down with the CNN "mostly peaceful" syndrome



BBC News (UK) ✓

@BBCNews

27 police officers injured during largely peaceful anti-racism protests in London



George Floyd: London anti-racism protests leave 27 officers hurt

You remember this all-time great - they retired the trophy after this one –



> From an article in *The Atlantic* by Christine Emba on why we are not having children, reinforcing my, existential angst theme -

That need is for meaning. In trying to solve the fertility puzzle, thinkers have cited people's concerns over finances, climate change, political instability, or even potential war. But in listening closely to people's stories, I've detected a broader thread of uncertainty—about the value of life and a reason for being. Many in the current generation of young adults don't seem totally convinced of their own purpose or the purpose of humanity at large, let alone that of a child. It may be that for many people, absent a clear sense of meaning, the perceived challenges of having children outweigh any subsidy the government might offer.

> Articles popping up all over about electricity and energy shortages, from New England, New York and the Mid-Atlantic, where you would expect stupidity, to Texas, where I would not have, had I not seen it with my own eyes.

Over a decade ago, one of my themes became energy crises, which would develop over years. Biden was a disaster in that respect. The real Kamala would be worse than Biden; not sure at all what the born-again Kamala would do in office. However, the initial stress is beginning to show, particularly under the extraordinary additional load from bitcoin and AI. Given lead times to fix all of this, we are probably in for an interesting decade or so.

I feel the need to update my thoughts in this space in the next few weeks, remembering that I think manmade global warming is real.

Can you say, Scyllia and Charybdis?

> Social media are a very bad thing for human culture and development - now this from *MIT Technology Review* -

AI companionship is no longer theoretical—our analysis of a million ChatGPT interaction logs reveals that the second most popular use of AI is sexual role-playing. We are already starting to invite AIs into our lives as friends, lovers, mentors, therapists, and teachers. Even the CTO of OpenAI warns that AI has the potential to be “extremely addictive.”

Democrats call Republicans weird as the truly-weird RFK Jr admitted to dumping a dead bear cub in Central Park. (Evidently, they think "weird" as a tagline plays better than "threat to democracy." I would have taken the other side of the argument.)

(Inquiring minds want to know whether RFK Jr got his brain worm from the bear.)

Of course, weird is going to become a meme.

Then the story comes out about RFK, Jr and his industrial freezer full of road kill - for his falcons.

> Probably nothing -

A new report from the House Judiciary Committee finds that at least 99 illegal migrants on the terror watch list have been released into the United States between 2021 and 2023. The report also found that Border Patrol has “encountered tens of thousands of migrants from countries that could present national security risks—including 2,134 Afghan nationals, 33,347 Chinese nationals, 541 Iranian nationals, 520 Syrian nationals, and 3,104 Uzbek nationals.”

> Separately, this - from a report by the Office of Inspector General at the Department of Homeland Security

The Department of State (DoS) issues nonimmigrant visas to individuals seeking entry into the United States on a temporary basis for tourism, medical treatment, business, temporary work, study, or other reasons. In 2020, due to the COVID-19 pandemic, and to address staffing limitations and visa backlogs, DoS and the Department of Homeland Security agreed to expand DoS' authorities to waive requirements to conduct consular interviews and collect fingerprints for some individuals seeking nonimmigrant visas. According to DoS, from calendar years 2020 through 2023, it granted nonimmigrant visas to approximately 7.1 million individuals without conducting in-person consular interviews. DoS also did not collect fingerprints for an unknown number of visas during the same period.

> He's clearly overreacting -

America has too many laws, says Supreme Court Justice Neil Gorsuch: “Over the past decade, Congress has adopted an average of 344 new pieces of legislation each session. That amounts to 2 million to 3 million words of new federal law each year.”

I can't decide whether this is really profound or really stupid -

Fed Open Market Committee member Goolsbee - There's no bad weather, there's only bad clothing.

> Life's really complicated - from the *AP*

Abortion was slightly more common across the U.S. in the first three months of this year than it was before the Supreme Court overturned *Roe v. Wade* and cleared the way for states to implement bans, a report released Wednesday found ...

> Interesting timing - from *The Morning Dispatch*

In a court filing on Wednesday, the office of special counsel David Weiss—who is investigating President Joe Biden’s son Hunter—alleged that the younger Biden had accepted payments from Romanian oligarch Gabriel Popoviciu while Joe Biden was vice president. The oligarch, who was facing a corruption investigation in his own country, was attempting to “influence U.S. government agencies,” according to the court filing. Hunter and a business associate allegedly hid the nature of the lobbying work they were doing for Popoviciu over concerns “that lobbying work might cause political ramifications for the defendant’s father.” The filing was entered as part of Hunter Biden’s upcoming federal tax trial.

> Japan issued an unprecedented megaquake advisory for the rising risk of unbelievably massive tremor possible in next week. They then had a 7.1 quake that I don't think matches the prediction of a "megaquake."

> Peter Zeihan on the Ukraine war -

Either Russia emerges victorious, and a confrontation with NATO is in the cards – OR – Ukraine comes out on top and sends the Russian State down a path of disintegration.

It Ain't Easy Being Green

> US oil production just hit a record high.

> I have posted an interview by the World Energy Council on the misguided goal of net zero by 2050 below the article on Walz.

Miscellany

Fair

My shoelace broke today.
Most people would blame Donald
Trump but I know it's actually
because of climate change.



If you don't understand this one, I can't help you.



Scott Adams  @ScottAdamsSays · 5h

I finally have a good answer when people ask why I didn't train to be an Olympic pole vaulter.



Oh, ok - here's a hint –



With Walz, Harris Passes on a Chance to Redefine Herself

By [Nate Cohn](#)

A few days ago, Donald J. Trump [said](#) vice-presidential nominees have “virtually no impact” electorally.

By selecting Minnesota’s governor, Tim Walz, as her running mate on Tuesday, Kamala Harris put Mr. Trump one step closer to being proved right.

A few days ago, it wasn’t so obvious Mr. Trump’s claim was on safe footing. While it’s true that most vice-presidential nominees don’t have a major impact, they often help the ticket in the vice-presidential nominee’s home state. The effect might be only a [percentage point or two](#), but Vice President Harris was considering an unusually strong slate of options from key states — and [the polls are close enough](#) for one or two points to be decisive.

In the end, she did not choose someone like Gov. Josh Shapiro of Pennsylvania or Senator Mark Kelly of Arizona. Instead, she selected someone from Minnesota, which is not a top-tier battleground.

Looking back, perhaps her decision shouldn't be surprising. Out of all the picks this century — JD Vance, Ms. Harris, Mike Pence, Tim Kaine, Paul Ryan, Joe Biden, Sarah Palin, John Edwards, Joe Lieberman, Dick Cheney — only Mr. Kaine hailed from what was considered to be a core battleground state at the time, Virginia. Instead, most vice-presidential nominees are selected with other considerations in mind, like a desire to bring balance to the ticket, or to add a governing partner, unify a fractured party or help define the presidential candidate — whether by reinforcing a candidate's message or by trying to defuse the opposition's critique.

By most of those other criteria, Mr. Walz is a very typical selection. As a white man from the rural heartland, he brings balance to a ticket led by a nonwhite woman from the Bay Area. He is a well-liked governing partner, as a former member of the House and a governor in his second term. He's a pretty mainstream Democrat who avoids an intraparty fight over Gaza and lets Ms. Harris keep riding the good vibes of her coronation over the last two weeks.

If there is one criterion that Mr. Walz doesn't fit, it's that he does relatively little to define or redefine Ms. Harris. In particular, he doesn't help compensate for what figures to be her core weakness with swing voters: her record on the border or her history of staking out progressive positions.

In a different set of circumstances, Mr. Walz might have done a lot more to help. He's a Democrat who, if anything, had a moderate record in Congress. But he unexpectedly became the veepstakes favorite for many progressives, who were often outright opposed to Mr. Shapiro or Mr. Kelly.

On paper, the ideological stakes of Walz over Shapiro or Kelly were quite small, but the fight was sufficiently intense for Mr. Walz's selection to be seen as a material win for progressives, regardless of whether it had anything to do with his selection. As a consequence, he won't assuage concerns that she's too far to the left; his selection doesn't signal that Ms. Harris intends to govern as a moderate. Many Republicans are already arguing that it's a left-wing triumph.

As Mr. Trump said, vice-presidential picks usually have “virtually no impact.” It's hard to believe anyone will think Ms. Harris is even farther to the left as a result of choosing Mr. Walz, who is no democratic socialist.

But ultimately, Ms Harris passed on an opportunity to use her vice-presidential nomination to redefine herself, even if only marginally, at the beginning of a crucial period for her campaign. There will be many more opportunities to do so as the glow of her coronation fades, like a policy platform rollout and the Democratic convention. The burden on her to take advantage of those opportunities grew ever so slightly by declining to use her vice-presidential selection as one minor tool to do it.

Angela Wilkinson: "We have to have a different conversation about energy that recognizes that energy connects everything."

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It is becoming increasingly clear that the ambitious project adopted mainly by OECD countries to subsidize and force an energy transition away from fossil fuels and drive global greenhouse gas emissions to net zero by 2050 is failing. An array of corporations and governments at all levels have in recent months announced delays or outright abandonment of aggressive net zero timelines and goals as market forces, resource and capital limitations, and simple realities renders them impractical and unachievable.

In the U.S., this trend has become crystal clear in both the electric vehicles and offshore wind industries over the past twelve months. In the automotive sector, many pure-play EV makers are now either in bankruptcy or teetering on the brink, while legacy carmakers like Ford, GM, Volvo, and Stellantis have spent much of this year having to explain [big losses](#) and re-thinking their strategic approaches and investments.

The [recent disaster](#) at the Vineyard Wind I project offshore Massachusetts, where the collapse of a 105 meter-long blade littered the Atlantic Ocean and Nantucket Island beaches with chunks of fiberglass core material, forcing federal regulators to shut down the country's only operational offshore wind project and giving the industry a public relations black eye. It's also raising public concerns over the vulnerability of such giant blades and turbines perched atop 850-foot-tall towers when rough weather conditions inevitably arise.

Other OECD countries are grappling with these and other issues, all of which have the impact of causing them to fall well behind their ambitious net zero goals. It seems inevitable now that the net zero by 2050 narrative will soon require a sliding-back to net zero by some less-immediate future date.

"We've got to have a different conversation about energy," [Dr. Angela Wilkinson](#), secretary general and CEO of [the World Energy Council](#), told me in [a recent interview](#). Wilkinson believes world leaders must "stop treating energy as though it's a single issue with a quick fix agenda," adding it is key to "take it much more seriously than quick."

The World Energy Council is celebrating [its 100-year anniversary](#) in 2024, continuing its ongoing mission to serve as a convener and honest broker to make connections and facilitate dialogue among the myriad stakeholders who make up the global energy community. Or, as Dr. Wilkinson put it to me, “we like say the Council has served as a voice of common sense for a century.”

In our interview, Wilkinson points out that “the transition is a messy and complex process, and we’ve never done it before, so we’re all learning it together.” Indeed, everyone involved is learning it together, often the hard way, at great cost to national budgets, corporate profitability, grid reliability, and energy security.

Wilkinson believes one constraining issue inhibiting the transition’s progress is a lack of full systems thinking and planning among the decision makers. “Energy transitions are a change in the organization of society,” she points out. “They’re not a simple case of swapping out one technology for another and everything else stays the same. Yet, we have this very simplistic narrative that we can take the oil system, we can put renewables in, it’s going to happen immediately, and nothing else will change. It’s like saying we’re going to take your thighbone out, but we’d like you to run a marathon.”

In our discussion, Wilkinson pointed to transition efforts in South Africa as an interesting case in point. “The world Bank put up \$497 million to try and help close down a coal mine and go to a clean and just energy transition. And it’s not worked,” she says. “And I can’t help but thinking there were analogies here in South Africa as they try and accelerate off coal, as there were in Europe when we transitioned rapidly from coal into gas in the UK.”

The challenge of transitioning power grids is another fit example of this need for systems planning. “You have to change all the points in the energy system to make it work,” she points out. “You’ve got to have the transmission grid strengthened and extended. To extend the transmission grid, you need more copper. You need twice the amount of copper that we currently have in transmission grids around the world by 2050, to build all these renewables on, and you’ve got to mine the copper. You’re going to mine the copper with green hydrogen, for which there’s not enough supply. So, you have to be a systems thinker, and there’s not enough systems thinking in energy transitions.”