

# **Thoughts on Coming Apart and the Coming Great Reset**



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

**Kit Webster**

**Transgender - The Metaphor**

**December 6, 2024**

**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 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.

## **Quotes to Contemplate**

Social scientists have identified at least three major forces that collectively bind together successful democracies: social capital (extensive social networks with high levels of trust), strong institutions, and shared stories. Social media has weakened all three. - Jonathan Haidt

Where no substantial occasion presents itself, the most frivolous and fanciful distinctions have been sufficient to kindle their unfriendly passions and excite their most violent conflicts. - James Madison

There are no "Jobs Americans won't do," only, "Wages Americans won't accept." -  
from X

When the heroes go off the stage, the clowns come on. - Heinrich Heine

## > **Primary Ideas in This Week's Post**

The trans movement is a good metaphor for the state of our culture in this Fourth Turning.

The great Trump disruption movement has already begun to take its toll, for better and for worse.

Our failure to properly and adequately educate our children is among our culture's biggest failures.

Biden's issuing preemptive pardons would be a significant change for the worse and a significant upping of the ante of political destabilization.

The Zeitgeist in the West has almost unanimously turned against liberal immigration policies.

## > **Cliches That Matter**

Slowly ... and then suddenly.

Once you understand it is all nonsense, it begins to make sense.

## > **Transgender - The Metaphor**

The whole transgender thing is not an obvious candidate for these contemplations. It's a social thing and societies have these social epidemics. They flare up and then they die down, either having been addressed or seen to be tempests in teapots.

The transgender debates are serious because they pertain to humans and address the intersection of the identity, gender, sex and queer debates. A number of people don't fit in ... what to do? The, what to do, bit is serious because the doing includes hormones, surgery and permanent change. At its most serious, it includes treatment for minors who, together with their parents, may not be making reasonable decisions. In my overly-simplistic view, the expressions of genes and the environment in which one is raised do not result in two, sharply-defined genders but a spectrum around each

gender. The main part of the bell curve for cis-women contains everything from girly girls to tomboys to athletes to nerds. They, increasingly along with lesbians, from lipstick to dyke, generally fit in and get by. It is the people far out on each tail that are the challenge.

One interesting juxtaposition for me is the furies with the trans.

Furies are people who behave like animals - who for some reason think they are animals. They are human, but instead of transsexual, they are trans-species. We just don't think or care much about furies.

Both are edge variations in human behavior, but trans is amplified because of the identity, gender, sex, queer thing. Also because some trans tend to be flamboyant and in-your-face.

My simplistic view is that if an adult wants to transition after having been fully informed about the process and its effects, go for it. If a minor wants to, be very, very careful. There are cases in which minors legitimately might transition. But the combination of normal gender confusion and current trendiness (for example, everybody became non-binary when it became the in thing to be) should lead to extreme caution and care. And, no, there is no evidence that transitioning reduces suicide rates.

Enough context.

Let's jump up to 30,000 feet and ask the, why is this happening now, question, and think about the implications for the broader culture.

Although trans have been around since the beginning of time and have been accepted by many cultures, we are here now with our culture.

We have been incorporating various groups into the mainstream over time (I'm not going to spend a lot of time on defining a woman or worrying about pronouns - you can figure it out):

Women - 50% of the population

Blacks - 14% of the population, both men and women

Gays - 5% of the population, both men and women, although since it is trendy to be gay, the numbers have been going up. It may take a decade or so for all of this to stabilize.

Trans - 0.5% of the population, all genders, again, going up with the trend.

One of the things that is going on is that people who are into human rights things in the US are running out of groups to champion. You get the gay thing pretty much done and you look around for who's next. Trans, of course. (After trans comes either pedophiles or animals, is my guess. It won't stop.)

I don't want to be too flippant. The rights of trans are important, but they are both a movement and an industry here that need to be served.

The fascinating thing is the hysteria, a great deal of which is manufactured. There are people who do not like or accept trans out there, but generally, the concept of putting them under the equal rights banner seems accepted. So now we push. Pronouns

become a thing - a highly charged thing. New pronouns. And if you get them wrong, or, heaven forbid, ignore them, you can be screamed at, canceled or fired. This is an extension of that words-as-violence thing that is insidiously eating away at our civic civility.

Then there came drag queen story hour - asserting flamboyant, sexual displays into the lives of children.

Then came the restroom thing and males in female sports thing.

Finally, we get the I-want-to-transition-and-you-are-going-to-pay-for-it, and minors-must-be-allowed-to-transition things.

I need a better name for one of my "laws:" 1 is next to 2 and 3 is next to 2. What that means is that humans, given the wealth and resources, will, in any context, live in State 1. State 1 will be normal and generally accepted. But, humans being human, they will start looking around for the new and the novel, from recreational drugs to space exploration to clothing style to number one songs. They will begin to move to 2. The change will be resisted, take time, but, ultimately, 2 becomes the new normal and no one can imagine living in 1 again. Then they get restless and start looking at 3 ...

Which all leads to my primary, fundamental law, humans will take all trends to their extremes. By the time you get to 13, you have friends with benefits and drag queen story hour, and god only knows what comes next. (In the fiscal arena, you get \$2 trillion annual deficits, a national debt of \$36 trillion, and god only knows what comes next.) Ultimately, the system, no matter which system you are discussing, becomes unstable, and you get a reset. Maybe it is a reset to 9, but it could be a reset to A.

We are adopting new rules for the social order - words can be violence. We are moving to 14, trying to fit corner cases into the mainstream, where they just don't fit. All things being equal, at some point, the whole trans issue will be decided, become mainstream, and we will move on to State 15.

The trans thing in the US is a reflection of both our good instincts and of our tendency to hysteria and black-and-white thinking when nuance is required.

The trans thing is an extreme microcosm of what we have become.

At the end of the current Fourth Turning, we will reset to A. I have no idea what trans' status in that new world will be. If there is a revolution, essentially no one will care until the "bigger" issues are resolved. Ultimately, we are going to have to decide what the new rules are for fitting a square peg into a round hole, or into whatever shaped hole system A is.

## Markets

### [Updated Charts](#)

> No change in outlook.

> Juliette Declercq is on Jack Farley's Money Matters podcast. She is always worth listening to. Interestingly, she is looking for a recession. My view has been that recessions are difficult with our level of deficits. However, whether they are the right thing to do, cutting off immigration, much less deportation, and cutting back government employment are deflationary.

## Short Takes

> So, you say you want a revolution?

Very nice article from *The Guardian*, outlining the historical forces behind Trump's election included at the bottom of this post.

Tariffs as a bargaining chip - Trump warns BRICS to back away from alternative currency or face 100% tariffs.

Jonathan Haidt - "Trump did not destroy the tower {of Babel, a metaphor Jonathan is using in his article}; he merely exploited its fall. He was the first politician to master the new dynamics of the post-Babel era, in which outrage is the key to virality, stage performance crushes competence, Twitter can overpower all the newspapers in the country, and stories cannot be shared (or at least trusted) across more than a few adjacent fragments—so truth cannot achieve widespread adherence."

Just saw on Substack a great description of Trump's diplomacy style: "stick-before-carrot."

The whole mandate thing is just a distraction. Trump will follow Obama's lead and do what he wants to do, while controlling both houses of Congress. Many forget that Obama essentially dismissed Republicans as superfluous in everything, particularly ObamaCare. Pendulums swing. Karma is a bitch. (I hated it then and hate it now, but there we are.)

Pro-Trump columnist Scott Jennings is joining the editorial board of the Los Angeles Times amid the paper's post-Election Day reckoning. The paper's owner, Dr. Patrick Soon-Shiong, extended the invitation to Jennings after announcing his intention to make the newsroom more balanced.

Trump said there will be "hell to pay" if the Gaza hostages are not released. New York City Mayor Eric Adams no longer cares what leftists think about him opposing mass illegal immigration into the city, saying he will work with the

incoming Trump administration on mass deportations, and saying that he doesn't care if he's 'cancelled' for it.

Biden is considering preemptive pardons for Fauci, Schiff and Cheney. Seems like a really bad idea and horrible precedent, bordering on evil.

We have friends and acquaintances that work for the government. They actually don't work very hard, as they admit, and they say that their coworkers do not either (of course, that's an over-generalization, but it has more than a kernel of truth). Ever since Trump was elected, everyone is trying to look busy, and is running scared.

*MIT Technology Review* - This week, China banned exports of several critical minerals to the US, marking the latest move in an escalating series of tit-for-tat trade restrictions between the world's two largest economies.

In explicitly cutting off, rather than merely restricting, materials of strategic importance to the semiconductor, defense, and electric vehicle sectors, China has clearly crossed a new line in the long-simmering trade war.

But at the same time, it selected minerals that won't cripple any industries—which leaves China plenty of ammunition to inflict greater economic pain in response to any further trade restrictions that the incoming Trump administration may impose.

> I'm shocked, shocked that Joe pardoned Hunter, despite saying he would not. That was sarcasm, but I really am surprised at how upset Democrats are about it. Did anyone with a braincell working and a knowledge of Biden and his family think that there was a snowball's chance in hell that Hunter would not be pardoned? Anyway, the pardon is effective 1/1/14, which hints that there are things yet to be found, which are now also pardoned.

> The Department of Education - Every few years, 4th and 8th grade students around the world are given tests to see how the various countries are doing wrt education. The US has generally not done well and slipped again in recent testing. For example, the US is 24th out of 45 systems in eighth grade math and 15th of 63 in fourth grade science. High-scoring countries included Singapore, Japan and England.

> Tomorrow is "the day that will live in infamy," Pearl Harbor Day. Did you remember?

> *LA Times* headline - In Syria, militias armed by the Pentagon fight those armed by the CIA. (Kit - we may actually win a war!)

> Speculation that Hillary would run in 2028. She would be 81.

> Speaking of Hillary, in 2008 she said, "If they've committed a crime, deport them." Trump is going to force everyone to take a stand next year.

I think this is hilarious. The *New York Times* describes female athletes as "non-transgender women."

> Liberals Trudeau (Canada) and Starmer (UK) are now speaking against high levels of immigration.

Cultural appropriation? China to build igloos on the Moon as they look to pull ahead in space race.

> Peer-reviewed paper - "Our results reveal that whenever handwriting movements are included as a learning strategy, more of the brain gets stimulated, resulting in the formation of more complex neural network connectivity...typewriting does not activate...networks the same way that handwriting does."

> Exemplifying demographic changes taking place due to mass migration, the most popular name for boys in England and Wales last year was Muhammad.

> Interesting and potentially incredibly important, people, including some "responsible" voices, are cheering the assassination of the UnitedHealthcare CEO. Voting against the elites is one thing; killing them is a whole different problem. These reactions are additional symptoms of the stresses in our culture that produced Trump.

> Jonathan Haidt in *The Atlantic* - "... the dart guns of social media give more power and voice to the political extremes while reducing the power and voice of the moderate majority. The "Hidden Tribes" study, by the pro-democracy group More in Common, surveyed 8,000 Americans in 2017 and 2018 and identified seven groups that shared beliefs and behaviors. The one furthest to the right, known as the "devoted conservatives," comprised 6 percent of the U.S. population. The group furthest to the left, the "progressive activists," comprised 8 percent of the population. The progressive activists were by far the most prolific group on social media: 70 percent had shared political content over the previous year. The devoted conservatives followed, at 56 percent.

These two extreme groups are similar in surprising ways. They are the whitest and richest of the seven groups, which suggests that America is being torn apart by a battle between two subsets of the elite who are not representative of the broader society. What's more, they are the two groups that show the greatest homogeneity in their moral and political attitudes. This uniformity of opinion, the study's authors speculate, is likely a result of thought-policing on social media: "Those who express sympathy



for the views of opposing groups may experience backlash from their own cohort.” In other words, political extremists don’t just shoot darts at their enemies; they spend a lot of their ammunition targeting dissenters or nuanced thinkers on their own team. In this way, social media makes a political system based on compromise grind to a halt.”

Yuk! The color of the year for 2025 will be brown.

> My man! Tom Holland from the great, *The Rest Is History*, podcast –

**Steven:** How can we use history to help illuminate or sharpen our thinking about the present moment?

**Tom:** History is the most valuable guide we have to the behaviour of human beings in the present; but this is not because it offers neatly tailored lessons of the kind that Thucydides or Machiavelli were prone to celebrating. The true value of history is that it reminds us of how infinite are the ways to be human; of how utterly contingent are our own circumstances; of how inevitable it is that much of what we take for granted will be viewed by later ages and peoples as utterly bizarre. Try to make decisions in the consciousness that the assumptions governing them are largely the product, not of universal truths, but of the very opposite: a moment in time that will very soon have slipped into the past.

## It Ain't Easy Being Green

> Talks among more than 170 countries collapsed after oil-rich nations pushed back on efforts to reduce plastic production. Negotiators hope to resume talks next year.

> From *New Scientist Daily* - Changes in cloud cover may account for why global temperatures for the past two years have exceeded the predictions of climate models. 2023 and 2024 saw temperature records repeatedly smashed, with both years now showing average temperatures around 1.5°C above the pre-industrial level. Climate change plus an El Niño weather pattern are partly to blame, but neither factor fully explains the extraordinary warmth. Now, researchers believe the answer lies in a sharp drop in low-lying cloud cover in 2023. This change reduced Earth's albedo – the planet's ability to reflect solar radiation back into space – causing an increase in temperatures

> I think this chart is profound. Energy consumption per capita is a reasonable proxy for standard of living.

After the first oil shock in 1973, much of the reduction was through efficiency and offshoring. That effect ended some time ago and is now reversing. Overall, maybe since 1982, this is an indication of how our real standard of living has changed over time.

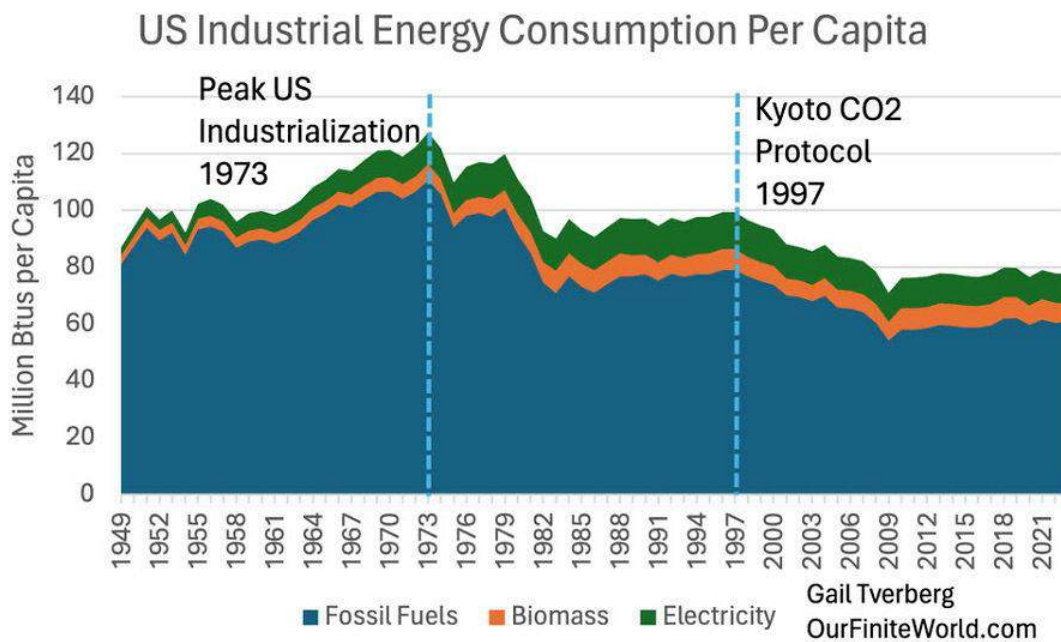


Figure 9. US industrial energy consumption per capita, based on data of the EIA.

## Miscellany

Nothing this week

# The deep historical forces that explain Trump's win

Our research shows that political breakdown, from the Roman Empire to the Russian revolution, follows a clear pattern: workers' wages stagnate, while elites multiply

Peter Turchin

Sat 30 Nov 2024 06.00 EST

In the days since the sweeping Republican victory in the US election, which gave the party control of the presidency, the Senate and the House, commentators have analysed and dissected the relative merits of the main protagonists – Kamala Harris and Donald Trump – in minute detail. Much has been said about their personalities and the words they have spoken; little about the impersonal social forces that push complex human societies to the brink of collapse – and sometimes beyond. That's a mistake: in order to understand the roots of our current crisis, and possible ways out of it, it's precisely these tectonic forces we need to focus on.

The research team I lead studies cycles of political integration and disintegration over the past 5,000 years. We have found that societies, organised as states, can experience significant periods of peace and stability lasting, roughly, a century or so. Inevitably, though, they then enter periods of social unrest and political breakdown. Think of the end of the Roman empire, the English civil war or the Russian Revolution. To date, we have amassed data on hundreds of historical states as they slid into crisis, and then emerged from it.

So we're in a good position to identify just those impersonal social forces that foment unrest and fragmentation, and we've found three common factors: popular immiseration, elite overproduction and state breakdown.

To get a better understanding of these concepts and how they are influencing American politics in 2024, we need to travel back in time to the 1930s, when an unwritten social contract came into being in the form of [Franklin D Roosevelt](#)'s New Deal. This contract balanced the interests of workers, businesses and the state in a way similar to the more formal agreements we see in Nordic countries. For two generations, this implicit pact delivered an unprecedented growth in wellbeing across a broad swath of the country. At the same time, a "Great Compression" of incomes and wealth dramatically reduced economic inequality. For roughly 50 years the interests of workers and the interests of owners were kept in balance, and overall income inequality remained remarkably low.

Franklin D Roosevelt signs a bill at the White House in 1933. Photograph: AP

That social contract began to break down in the late 1970s. The power of unions was undermined, and taxes on the wealthy cut back. Typical workers' wages, which had previously increased in tandem with overall economic growth, started to lag behind. Inflation-adjusted wages stagnated and at times decreased. The result was a decline in many aspects of quality of life for the majority of Americans. One shocking way this became evident was in changes to the average life expectancy, which stalled and even went into reverse (and this started well before the Covid pandemic). That's what we term "popular immiseration".

With the incomes of workers effectively stuck, the fruits of economic growth were reaped by the elites instead. A perverse "wealth pump" came into being, siphoning money from the poor and channelling it to the rich. The Great Compression reversed itself. In many ways, the last four decades call to mind what happened in the United States between 1870 and 1900 – the time of railroad fortunes and robber barons. If the postwar period was a golden age of broad-based prosperity, after 1980 we could be said to have entered a Second Gilded Age.

The uber-wealthy increased tenfold between 1980 and 2020

Welcome as the extra wealth might seem for its recipients, it ends up causing problems for them as a class. The uber-wealthy (those with fortunes greater than \$10m) increased tenfold between 1980 and 2020, adjusted for inflation. A certain proportion of these people have political ambitions: some run for political office themselves (like Trump), others fund political candidates (like Peter Thiel). The more members of this elite class there are, the more aspirants for political power a society contains.

By the 2010s the social pyramid in the US had grown exceptionally top-heavy: there were too many wannabe leaders and moguls competing for a fixed number of positions in the upper echelons of politics and business. In our model, this state of affairs has a name: elite overproduction.

Elite overproduction can be likened to a game of musical chairs – except the number of chairs stays constant, while the number of players is allowed to increase. As the game progresses, it creates more and more angry losers. Some of those turn into "counter-elites": those willing to challenge the established order; rebels and revolutionaries such as Oliver Cromwell and his Roundheads in the English civil war, or Vladimir Lenin and the Bolsheviks in Russia. In the contemporary US we might think of media disruptors such as [Tucker Carlson](#), or maverick entrepreneurs seeking political influence such as [Elon Musk](#) alongside countless less-prominent examples at lower levels in the system. As battles between the ruling elites and counter-elites heat up, the norms governing public discourse unravel and trust in institutions declines. The result is a loss of civic cohesiveness and sense of national cooperation – without which states quickly rot from within.

One result of all this political dysfunction is an inability to agree on how the federal budget should be balanced. Together with the loss of trust and legitimacy, that

accelerates the breakdown of state capacity. It's notable that a collapse in state finances is often the triggering event for a revolution: this is what happened in France before 1789 and in the runup to the English civil war.

How does this landscape translate to party politics? The American ruling class, as it has evolved since the end of the civil war in 1865, is basically a coalition of the top wealth holders (the proverbial 1%) and a highly educated or "credentialed" class of professionals and graduates (whom we might call the 10%). A decade ago, the Republicans were the party of the 1%, while the Democrats were the party of the 10%. Since then, they have both changed out of all recognition.

The recasting of the Republican party began with the unexpected [victory of Donald Trump in 2016](#). He was typical of political entrepreneurs in history who have channelled popular discontent to propel themselves to power (one example is Tiberius Gracchus, who founded the populist party in late Republican Rome). Not all of his initiatives went against the interests of the ruling class – for example, he succeeded in making the tax code more regressive. But many did, including his policies on immigration (economic elites tend to favour open immigration as it suppresses wages); a rejection of traditional Republican free-market orthodoxy in favour of industrial policy; a scepticism of Nato and a professed unwillingness to start new conflicts abroad.

It seemed to some as though the revolution had been squashed when a quintessentially establishment figure, Joe Biden, [defeated](#) Trump in 2020. By 2024 the Democrats had essentially become the party of the ruling class – of the 10% and of the 1%, having tamed its own populist wing (led by the Vermont senator Bernie Sanders). This realignment was signalled by Kamala Harris massively outspending Trump this election cycle, as well as mainstream Republicans, such as Liz and Dick Cheney, or neocons such as Bill Kristol, supporting the Harris ticket.

The GOP, in the meantime, has transformed itself into a truly revolutionary party: one that represents working people (according to its leaders) or a radical rightwing agenda (according to its detractors). In the process, it has largely purged itself of traditional Republicans.

The defeat on 5 November represents one battle in an ongoing revolutionary war Trump was clearly the chief agent of this change. But while the mainstream media and politicians obsess over him, it is important to recognise that he is now merely the tip of the iceberg: a diverse group of counter-elites has coalesced around the Trump ticket. Some of them, such as JD Vance, had meteoric rises through the Republican ranks. Some, such as Robert F Kennedy Jr and Tulsi Gabbard, defected from the Democrats. Others include tycoons such as Musk, or media figures, such as Joe Rogan, perhaps the most influential American podcaster. The latter was once a supporter of the populist wing of the Democratic party (and Bernie Sanders in particular).

The main point here is that in 2024, the Democrats, having morphed into the party of the ruling class, had to contend not only with the tide of popular discontent but also a revolt of the counter-elites. As such, it finds itself in a predicament that has recurred thousands of times in human history, and there are two ways things play out from here.

One is with the overthrow of established elites, as happened in the French and Russian Revolutions. The other is with the ruling elites backing a rebalancing of the social system – most importantly, shutting down the wealth pump and reversing popular immiseration and elite overproduction. It happened about a century ago with the New Deal. There's also a parallel in the Chartist period (1838–1857), when Great Britain was the only European great power to avoid the wave of revolutions that swept Europe in 1848, via major reform. But the US has so far failed to learn the historical lessons.

What comes next? The electoral defeat on 5 November represents one battle in an ongoing revolutionary war. The triumphant counter-elites want to replace their counterparts – what they sometimes call the “deep state” – entirely. But history shows that success in achieving such goals is far from assured. Their opponents are pretty well entrenched in the bureaucracy and can effectively resist change. Ideological and personal tensions in the winning coalition may result in it breaking apart (as they say, revolutions devour their children). Most importantly, the challenges facing the new Trump administration are of the particularly intractable kind. What is their plan for tackling the exploding federal budget deficit? How are they going to shut down the wealth pump? And what will the Democrats' response be? Will their platform for 2028 include a new New Deal, a commitment to major social reform?

One thing is clear: whatever the choices and actions of the contending parties, they will not lead to an immediate resolution. Popular discontent in the US has been building up for more than four decades. Many years of real prosperity would be needed to persuade the public that the country is back on the right track. So, for now, we can expect a lasting age of discord. Let's hope that it won't spill over into a hot civil war.

Peter Turchin is project leader at the Complexity Science Hub, Vienna, and the author of *End Times: Elites, Counter-Elites and the Path of Political Disintegration* (Allen Lane).