

Thoughts on Coming Apart and the Coming Great Reset



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

Kit Webster

You Only Had One Job

January 3, 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

Men, it has been well said, think in herds; it will be seen that they go mad in herds, while they only recover their senses slowly, one by one. - Elif Shafak

Civilisations die from suicide, not from murder. - Arnold Toynbee

> Primary Ideas in This Week's Post

Humans are individual-ing and hedonize-ing themselves into extinction

The actions Biden is taking to block Trump are creating very, very damaging precedents.

> You Only Had One Job

We don't think about it, much, but humans are self-conscious animals - no more and no less. Evolved from animals, bodies like primate bodies, brains like primate brains, only we are self-conscious. We are animals of the genus homo sapiens, ultimately descended from a single-celled species eons ago.

Animals, indeed all of life on Earth, have only one purpose - to reproduce.

That's it.

All the rest of life consists of either things that contribute to reproduction - eating, exercise, mating - or essentially meaningless episodes to fill out the rest of the hours in a day. The bird does not have many spare hours due to its continual quest for food. Because of technology and the use of energy, humans have lots of spare time. I'm not going to wax philosophical here, but either you are religious or you have to create meaning in your life. Your life has no more intrinsic meaning than that of the bird outside your window. The only difference is that you can create castles in the air. The bird cannot. As Macbeth put it - "Life's but a walking shadow; a poor player, that struts and frets his hour upon the stage, and then is heard no more: it is a tale told by an idiot, full of sound and fury, signifying nothing."

So, you have one job, and that is to reproduce.

And you are failing, miserably.

Our species is, incredibly, moving itself toward extinction - ironically because it has been so successful. We have taken over and transformed the entire Earth, and at the same time, have decided that children are not "worth it."

Let's look at some statistics.

Each woman, as a statistical average, has to give birth to 2.1 children in order for population to remain constant. Following are average reproductive rates for various societies:

- Niger is the highest at 6.6. In general, the less developed the country, the higher the fertility rate. However, fertility rates are decreasing, even in third-world countries.
- Israel at 2.9 has the highest rate of any developed country.
- The world average is 2.3. In this statistical set by the UN, the replacement rate is 2.3 due to the inclusion of many countries with high rates of infant mortality. The 2.1 number is more appropriate for developed countries.
- India is 2.0.
- France is the highest developed country, excluding Israel, at 1.8. Every developed country is going out of business.
- The US is 1.7. US population is hanging in there due to immigration.
- Russia is 1.5.
- China is 1.2. China is in a demographic nightmare. Its population peaked around 1.4 billion; it is projected to be 633 million in 2100.
- At the bottom are Singapore (1.1), South Korea (0.9) and Hong Kong (0.8).

The future belongs to Africa and the Middle East.

A dog does not need a reason to reproduce - its instincts take over, and, viola, puppies. Humans used to be that way. People get horny, sex occurs and babies happen. Importantly, the culture valued babies and motherhood - these were mainstream values.

Then, birth control happened, abortion became increasingly culturally acceptable, and then having children increasingly became something that could be planned or ignored altogether.

Critically, feminism occurred.

Here is how AI summarizes it, "The global decline in human fertility rate is primarily driven by increased access to contraception, women's empowerment through education and career opportunities, leading to a choice to delay or have fewer children, coupled with changing societal norms that prioritize individual aspirations over large families, all contributing to a trend of later childbearing and lower birth rates."

When, after millennia of being "barefoot and pregnant," you give women the opportunity to express and realize themselves, they will, more than reasonably, take you up on it.

Babies are expensive.

Babies require care.

Babies require sacrifice, particularly from women.

Babies are no longer a positive, in the sense of providing extra labor on the farm.

Babies grow into teenagers.

As a personal aside, for complicated, mostly psychological reasons, I did not want to have children. As fate would have it, I found my soul mate, who defined herself in terms of motherhood. She wanted to be a mother (and even today, cuddles babies in

the NICU because of her overwhelming love of children). I could not ask her to not have children, so with great trepidation on my part, we adopted two sons. Occasionally, people ask me about my experience as a father - from the perspective of someone who did not want to have children in the first place. My response is that it is one of the best things that ever happened to me - if I had the chance to do it over again, I would in a heartbeat. But it was also one of the most frustrating and maddening things that ever happened to me. My point is that you do not understand the rewards of parenting, particularly from newborn to, say, age 12, and after, say, 24, unless you actually do it. It is one of the great experiences of life. But, we could afford it, and Beth was a full-time mom. We were able to experience parenthood in ways that have become increasingly rare. Day after day, I relentlessly preach about the good and bad in everything, about the imperative of trade-offs. When it comes to having children humans have decided, explicitly, that individual expression, particularly among women, is more important than having children. We have decided, implicitly, that short term happiness trumps extinction. Of course, extinction will likely not happen. Our culture will likely continue to evolve toward individualism and hedonism until it breaks. It is not clear how you put the genie of hedonism back into the bottle so that self-sacrifice can dominate once again. But if we do not do that, we will have failed at our one job.

Markets

[Updated Charts](#)

- > No change in outlook.
- > Debt limit maneuvers and machinations are coming to a country near you.
- > Juliette Declercq is "more worried about recession than inflation." Another indicator of the knife's edge-vulnerability of the economy.

Oh, shit - the black swan whisperer speaks –



Jim Cramer  
@jimcramer

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I'm very bullish on 2025. Probably the best year that we will have in decades. Happy new year everyone!

11:55 AM · 12/31/24 · 110K Views

So, You Say You Want A Revolution?

> Well, now MAGA has a civil war about legal immigration. Not a good start - but inevitable. Trump weighs in - "I've always liked the visas, I have always been in favor of the visas. That's why we have them. I have many H-1B visas on my properties. I've been a believer in H-1B. I have used it many times. It's a great program."

A judge has shut down Biden's sale of border-wall materials.

> Informal opinions by Russian diplomats quoted on X, which seem reasonable to me - The Russia-Ukraine war will not end easily. Trump's election will not change everything overnight, as the situation is not so one-sided that one side will give up. To end the war immediately after taking office, as Trump has pledged, would require Ukraine to concede too many things, which the Russians don't think the Ukrainians will be able to accept. If Trump were to try to force Zelensky to cave, a quick deal would be impossible because Putin would also demand too much from Ukraine and the U.S.

> FBI releases pictures of Hunter and Joe with Hunter's business partners, who Joe said he never met. I know I'm shocked.

> Trump announces plans to designate Election Day as a national holiday, introduce single-day voting, use paper ballots, and require government-issued voter ID.

> Joe Biden regrets having pulled out of this year's presidential race and believes he would have defeated Donald Trump in last month's election – despite negative poll indications, White House sources have said.

> Appeals court upholds \$5 million fine of Donald Trump in E. Jean Carroll case.

> Between 1993 and 2001, during the Presidency of Bill Clinton, about 870,000 people were deported. Between 2001 and 2008, during the Presidency of George W. Bush, about 2.0 million people were deported, while between 2009 and 2016, during the Presidency of Barack Obama, about 3.2 million people were deported.

The women's march is back, rebranded as the People's March, including blacks, LGBTs and immigrants. Participants have been instructed not to bring Handmaid's Tale costumes because such imagery has been proliferated "primarily by white women."

> Trump (and Bernie Sanders) supports capping credit card interest at 10%. That will wind up significantly reducing available credit as well as credit card "perks." The second bit is fine; very few understand the first bit. First-level thinkers are always shocked by second and third order effects.

Death row prisoner spared by Biden asks to be released entirely, says jail has caused him "unjustifiable psychological harm"

> Sarah Isgur on Trump and deportations - He said he's going to do mass deportation. But I do not think this will be "mass deportation" as we generally understand it. The administration will make life so painful that it encourages self-deportations. They'll add resources into border security stuff and speed up asylum claims. And, my prediction is a lot of litigation, because a president isn't in charge of our immigration system, it's Congress. So unless he can move something through Congress, which I don't predict happening, this will be met with endless lawsuits.

> Biden will award Liz Cheney the Presidential Citizens Medal - for those who have performed "exemplary deeds of service."

> Elon Musk says that there should be a law that all bills introduced in Congress should be digitally accessible to the public at least 7 days before any vote in Congress.

> President Biden is set to implement a permanent ban on additional offshore oil drilling in order to establish "difficult-to-revoke" regulations prior to the inauguration of Trump, as reported by Bloomberg. (Kit - you can't begin to imagine the destructiveness of this precedent.)

> Investment bank Morgan Stanley announced today that they are leaving the Net-Zero Banking Alliance, joining Citigroup Inc. and Bank of America, which left the global climate coalition earlier this week.

Short Takes

Record low Arctic temps, FAR below the historic average have accumulated lots of polar air, which will be released when the Arctic polar air warms up and expands over continents. By Jan10 the polar air will be completely flooding the US +Europe.

> Amazon Prime edited *It's a Wonderful Life*, taking out the pivotal scene where the angel shows George what the world would be like if he committed suicide.

> Norway has stopped selling all vehicles with combustion engines for good.

> I enjoy the commentary of Sabine Hossenfelder on X and other places. She is a nonsense, German physicist. Mostly, she talks about science things, but I have included her commentary on the bird flu at the bottom of this post.

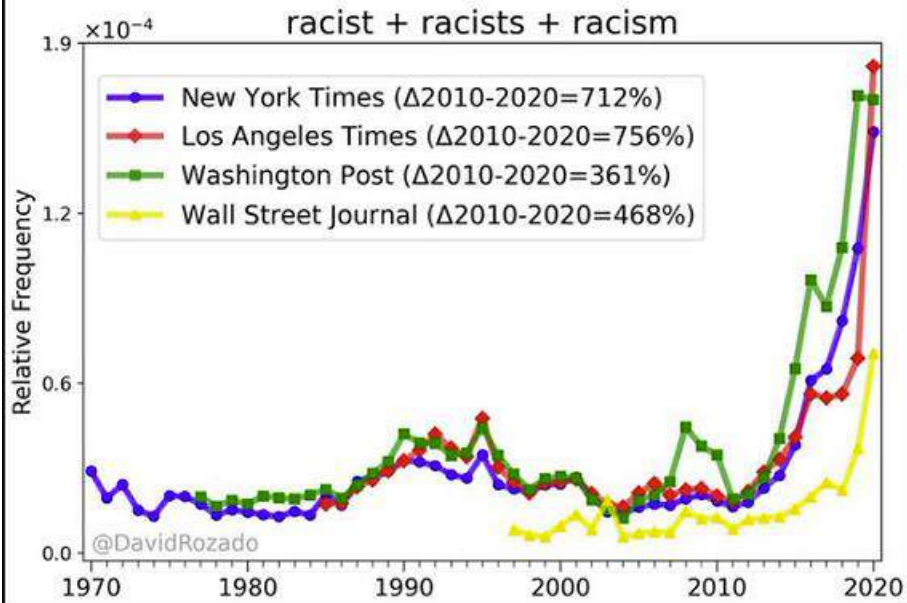
> Russia shut off the natural gas flowing through Ukraine to Europe.

One existential threat to humankind, the super volcano, at least the one under Yellowstone, seems dormant for now. A study said that its magma isn't connected enough and the associated volcanic activity is moving.

Miscellany



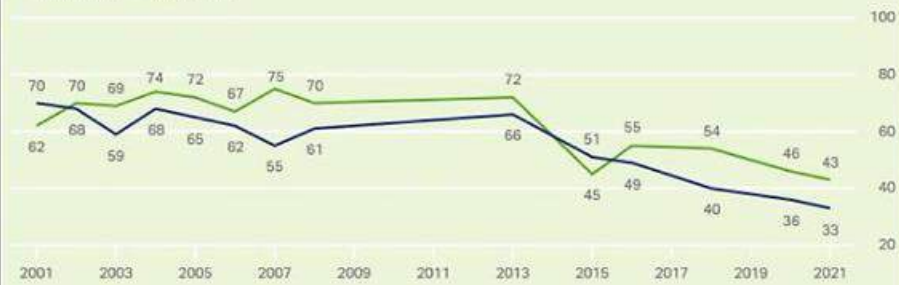
Term Frequency in Popular U.S. Newspapers



Would you say relations between White and Black people are very good, somewhat good, somewhat bad or very bad?

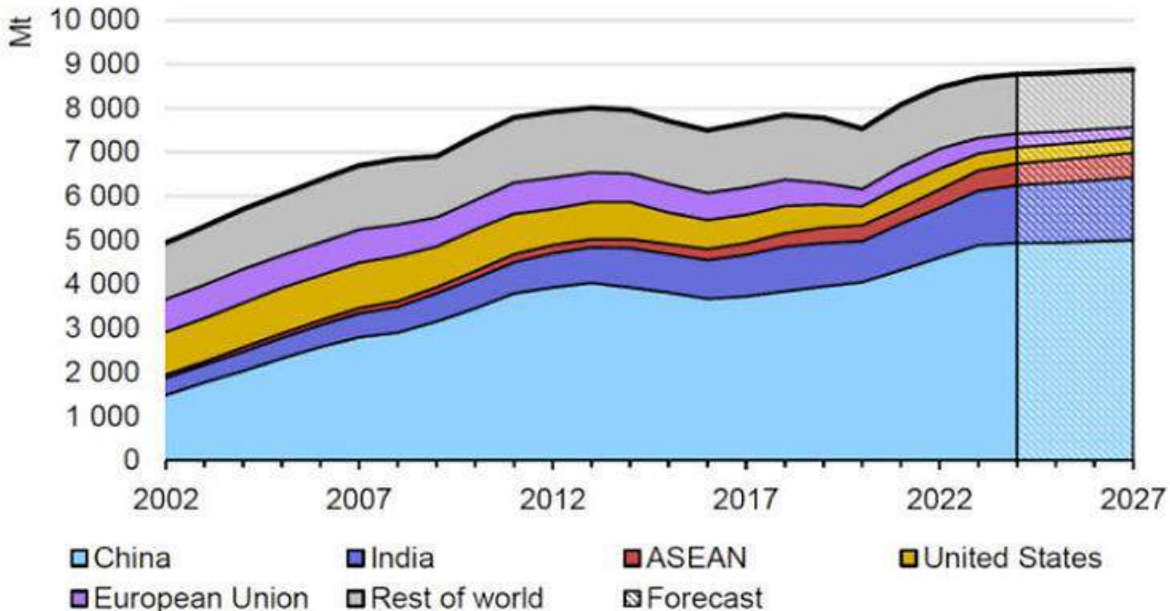
% Very/Somewhat good

— White adults — Black adults



GALLUP

Global coal consumption, 2002-2027



IEA. CC BY 4.0.

[Sabine Hossenfelder](#)

[@skdh](#)

Since I see there are some Americans already spreading misinformation about the bird flu, let me give you some context. The currently circulating H5N1 bird flu virus has been around among birds for about 30 years. It was first isolated in China in 1996. Bird flu pandemics happen pretty much every year and are nothing much to worry about per se. However, the H5N1 virus is transmissible to humans. It has previously (about 20 years) ago, repeatedly led to smaller outbreaks among humans, and those have seen human-to-human transmission. (This info comes from the WHO.) The fatality rate among humans in these earlier outbreaks has been about 50%. These cases were mostly in Egypt and Indonesia. (Again this is WHO info.) Unlike for COVID, the fatality rate of H5N1 has been higher among young people. This is because of the distribution of some receptors in the lung that changes with age, I forgot the details but this has been studied a lot by people smarter than me. The current H5N1 outbreak in the USA which has been going on for almost a year now worries epidemiologists not because of the birds, but because it's also infected cattle, swine, and various other mammals, including humans. That the CDC has said they have no evidence for human-to-human transmission doesn't mean there hasn't been any. If you don't collect data, you won't find no evidence in it. Generally, any virus that humans can be infected by can also be transmitted between humans, the question is just how readily this happens. If humans carry the virus in places other people are unlikely to come into contact with, the transmission risk is basically zero unless, idk,

you habitually scratch around in someone else's lower lungs or such. When epidemiologists speak of human-to-human transmission they mean the virus readily spreads upon contact in one way or another. There has been no evidence for this -- so far. This is what the CDC says (and the WHO) and it's the hope that Americans now cling onto. However, as I said, the same virus has previously caused human-to-human transmission (if not very effectively so). Even more worrisome, viruses can swap parts of their genetic makeup among each other if they are present in the same host. There are now various mammals (including humans themselves) that can have both a H5N1 infection and a readily-transmissible human influenza infection. It's only a matter of time until the current strain mutates and human-to-human transmission starts. This is not a matter of if, it's just a matter of when. Maybe we are lucky and it won't happen this winter. Maybe we're even luckier and it won't happen the entire decade. But it will happen eventually. This is why epidemiologists have been going on about this virus for decades. How fatal will it be once it's human-to-human transmissible? Well, no one knows. You can dismiss everything I just said as fear mongering. Fine with me, I don't care, honestly. But please consider the following. The moment the USA reports an outbreak with human-to-human transmission, they'll start quarantining people. Earlier outbreaks have remained small, limited to some 100 people or so. If we're lucky, this one will be the same. If we're unlucky it won't. What will happen then is that the rest of the world will issue travel bans to North America and everyone will scramble to get vaccines out while people die in hospital corridors. There are vaccines for bird flu in humans which have been approved both in the US and the EU. The issue is though that while they have been tested for safety, no one knows how well they work, since there are so few naturally occurring infections. The question you have to ask is therefore a practical one: When is the right time to prepare vaccines? Forget about all the crazy people who think vaccines are evil or a ploy by the pharma industry or whatever. We know from COVID that luckily the vast majority of people are reasonable and don't want to die from preventable disease. So there's an economic question to answer: When do you invest into preparing vaccines to prevent an economic disaster downstream? I have no answer to this, but I think that looking at it from the economic perspective is helpful.