

# The Political Forum

*A review of social and political trends and events  
impacting the world's financial markets*

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## THEY SAID IT

“To angry Democrats like Nancy Pelosi and Ted Kennedy, terrorists and militia aren’t responsible for the deaths of U.S. soldiers, their commander-in-chief is. And our servicemen and women, in putting torture chambers ‘under U.S. management,’ are no different than a regime that systematically tortured, raped and killed its own people . . . The San Francisco/Boston Democrats led by John Kerry have now adopted Blame America First as their official policy.”

-- Ed Gillespie, Chairman, Republican National Committee.

**BUSH’S FLAW. FATAL OR FIXABLE?** In any normal election year, George W. Bush would at this moment be cruising to re-election, likely in a rout reminiscent of Ronald Reagan’s defeat of Walter Mondale twenty years ago. Bush has so many factors in his favor that it should be next to impossible for him to lose. Among other things, he is engaging, personable, and well liked by most of the public. More importantly, the economy is strong and strengthening. And finally, his opponent is, to put it nicely, a political lightweight.

But this is not a normal year. The war in Iraq, the attending prison abuse scandal, and the general unease with the conduct of the war on terror have turned what might otherwise have been a blowout into a close race; so close in fact that many observers maintain that the President has fallen behind his challenger, John Kerry, for the first time since the Massachusetts Senator sewed up the Democratic nomination.

Of course, every pundit has an explanation for this phenomenon. But the one that is seeming to gain most currency among the ranks of George Bush’s own party, both in Congress and the conservative press, is that the President suffers from a crippling inability to communicate effectively to his friends, enemies, the media, and voters why he does the things he does and how those things benefit the people of the United States.

In today’s unwelcoming and unstable global environment, American voters naturally need reassurance from their President that he knows what he is doing, and poll after poll indicate that voters are not getting this comfort from their President.

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At the heart of this problem is the political maxim that it does not always matter how well things are going, if the public perception differs too dramatically from reality. In 1992, for example, Republicans were caught off guard by the surprising weakness of their candidate, despite the fact that he was widely considered to have been a heroic wartime president only a year before the campaign began.

And while there had been a recession, it was, as recessions go, not terribly severe. More to the point, the recovery had begun, GDP was growing, and the economic picture looked reasonably positive. Finally, Bush the Elder was running against a mediocre governor with a seedy reputation for corruption and philandering, who had won the Democratic endorsement simply because no one else in the party had thought it was worth winning.

In the end, however, Bush did a terrible job of communicating this positive outlook, most especially in his failure to bring the public up to date on the increasingly healthy state of the economic recovery. And, of course, it didn't help that the Democratic candidates, Bill Clinton and Al Gore, were very good at taking advantage of the President's inability to tell his story.

Today, many Republicans fear that the problem with the Bush campaign is not policy or execution, but the same one his father had, namely failing to bridge the gap between perception and reality. This time around, the economy is not only in recovery, but has been for some time, and has actually surpassed many economists' expectations for what was possible in the wake of 9/11 and two foreign wars. Moreover, the recession was remarkably mild, remarkably short-lived, and may well have begun before Bush took office. And as for the war in Iraq, things are hardly as dire as the mainstream media would have us believe. The good news may not be as good as some would hope, but American forces are making progress, and the abject desperation voiced by many observers is almost certainly unwarranted.

Yet, such good news appears to be lost on much of the public, not because the media is necessarily hostile to the message, but because George Bush seems incapable of effectively telling the story of his successes, and projecting an aura of confidence about the future.

Once again, every pundit has an explanation for this phenomenon. Some critics charge that the President is unusually arrogant, and that this arrogance precludes him from more effectively explaining his positions. This is particularly the concern on Capitol Hill, where legislators are so troubled by this speck in President Bush's eye that they are unable to see the plank in their own. Others feel that George Bush is simply as unintelligent as his critics have always alleged. They take his stammering speech patterns to be indicative of ignorance, which they believe naturally leads to a limited capability for communication. In either case, the charge is that the President is congenitally flawed, incapable of saving himself or of being saved by his campaign advisers.

I think both camps are wrong. I think President Bush's stunted communication skills are not, contrary to the hopes of liberals and the fears of conservatives, due to either arrogance or ignorance. I think it is an unfortunate residual of one of the things that Bush's admirers most appreciate about him, namely his moral certainty.

Like President Reagan before him and few since, President Bush knows what he believes and believes it deeply. And while most conservatives agree that this is generally a good thing, there

are times when this moral certitude keeps him from performing one of the most important Presidential tasks, namely aggressively to sell his policies to the American public, not just stating them, but publicly recognizing the existence of other sides and other arguments and juxtaposing his plans, hopes and dreams against those of his critics and opponents.

In short, President Bush appears to believe that everyone just “gets it,” like he does, and if anything, he appears frustrated and surprised that even some of those who share his beliefs still don’t just “get it.”

For Republicans, the good news in all of this is that while Bush’s failure to communicate is certainly a flaw, it is not necessarily a fatal one. Repeatedly throughout his Presidency, when circumstances have compelled him to connect with the nation or with the world, George W. Bush has done so brilliantly.

Though Bill Clinton was certainly a much more gifted communicator than this President, one would, I believe, be hard pressed to find even one Clinton speech, presentation, or message to the American people that anyone anywhere (accepting Bill himself) would consider “great.” Yet the stammering, syntax mangling Cowboy from Texas has given at least half-a-dozen speeches in the two-and-a-half years since 9/11 that are and will long be considered among the more memorable and powerful ever given by a modern American President. In other words, when Bush is “on message” he is not simply good, but potentially great. All he needs is the push necessary to force him to be “on message.”

Judging by the events of last week, he is not there yet. His brief and reportedly harried meeting with Congressional Republicans was hardly the act of a man who has recently honed his communications skills. At the same time, though, Bush’s scheduled speech tonight could well be the turning point for which his supporters have been waiting. The last several times he has made such speeches, he has appeared drawn, tired, and uninspired. But the last several times before that, he was not only inspired himself, but inspired a nation to pick up the pieces after a great tragedy and to prepare for war.

How he will perform tonight is anyone’s guess. But I am betting that as the electioneering begins in earnest, he and his speechwriters will figure out a way effectively to take their message to the American voters, just as they did four years ago.

**KERRY’S BURDEN. IT AIN’T HEAVY, IT’S MY PARTY.** Regular readers know that Mark and I think that John Kerry is one of the weakest candidates nominated by either of the two major parties in the last quarter-century or more. And as I noted above, if this were a normal election year, Kerry would, in my opinion, likely be in for a beating at George W. Bush’s hands this November. That said, last week, Kerry did something that can only be described as tactically brilliant, something that makes it clear that he is learning on the job and has a chance of becoming a serious contender. He shut his mouth.

This is not, I should note, a gratuitous swipe at John Kerry. It is an acknowledgement that he and his advisors have done something very smart in finally figuring out that the most effective way to deal with a situation like that unfolding in Iraq is simply to back off and allow the current occupant of the White House to sink or swim without a lot of kibitzing from the shore.

If the President cleans the mess up in Iraq and emerges victorious, all previous carping from Kerry will have been for naught. Indeed, by sniping at Bush's handling of the war while soldiers are in harm's way, Kerry runs the risk of appearing disloyal and unconcerned about the well being of the troops. On the other hand, if the situation in Iraq continues to disintegrate, Kerry will reap the benefits, as long as he hasn't said something stupid while awaiting the outcome. In short, Kerry has rightly, and somewhat unexpectedly concluded that with regard to Iraq, silence is golden; that his interests are best served by, as he put it, giving "the president some space to get things done and see what happens."

Unfortunately for Kerry, this new found savvy may not be enough to win the day. You see, like Sisyphus, he is permanently cursed with the presence of a giant burden on his back, which he must carry with him each day as he trudges up the long, difficult campaign trail.

This burden is, of course, his own Democratic Party, which is populated from top to bottom with what can only be described as the strangest gang of unruly, megalomaniacal attention seekers that any party has fielded since the earliest days of the Republic. And what makes this load so very heavy for Kerry is that, as the Party's presumptive nominee he is considered to be the leader of this outspoken band, but in fact has no control whatsoever over any of its most prominent members. Indeed, one would be hard pressed to think of any past candidate for the presidency who was so inconsequential to his own party as John Kerry is.

For example, if one were to ask potential voters in this country to name a prominent Democrat, 90-plus percent of respondents would most probably give one of two with the last name "Clinton." A good chunk of the rest would probably name someone else in party, maybe the Senate Minority Leader Tom Daschle, or the best-known and most famous name in the party, Ted Kennedy. Very few, I think, would name Kerry, and of those who did, a good percentage would probably think he was the former Senator from Nebraska, who has been harassing Condoleezza Rice and other administration officials over the last several weeks.

Last week, *The Washington Post* ran a front page story by two of its best known reporters, Dan Balz and media critic Howard Kurtz, detailing the trouble Kerry is having trying to get "screen time" as he begins his general election run at George Bush. They blamed the situation on the fact that it is always difficult for a challenger to attract attention when facing an important incumbent during tumultuous times. I would argue that the most interesting aspect of the story this time around is that Kerry's primary competition for airtime comes from not from the President, but from Democrats who are better known and more interesting.

For starters, Kerry is going to be shoved off the front pages for several weeks this summer as Bill Clinton tours the country promoting his autobiography, *Aint' I Great? Don't You Miss Me?* Generally speaking, most candidates don't have significant problems with past presidents, who tend graciously to fade into retirement. And certainly, few candidates ever have problems with former Presidents from their own party. But in this case, as in every other, Bill is a slightly different former president.

He has never really gone away, and he's not likely to do so anytime soon. He is still captivated by the cameras, the wildly enthusiastic audiences and, most importantly, the shrieking young

girls. And frankly, many people are still captivated by Bill. Add to that the fact that Bill's wife is quite possibly the most influential and politically astute current Democratic officeholder in the nation, and that the two of them together likely clandestinely harbor ill will for John Kerry, who stands to screw up their long-term plans, and it's easy to see that the morose, un-telegenic Kerry is going to be tilting at proverbial windmills as he tries to keep the focus on himself and off the previous President.

But as damaging as the media's Clinton diversion may be, it will likely be only fractionally as damaging as the media play that other less gregarious Democrats will receive at John Kerry's expense as the campaign session shifts into high gear.

For example, as I noted above, Kerry's strategy for backing off the criticism of the war is smart and sane. But it is also unlikely to have much of an impact on voters as long as higher profile Democrats continue to puff and rage about the futility and corruption of the war, constantly reminding Americans that Democratic Party is the natural home of the nation's blame-America-first, loony left.

The news stories from last week provide an excellent example of just how this is likely to play out for Kerry. While the candidate's prudent and decent comments about giving the President room to operate in Iraq were buried in an AP story that few people read, Senator Fritz Hollings (SC) and House Minority Leader Nancy Pelosi (CA) were out railing against the forces of darkness within the Bush administration, making themselves and, by extension, their party look nutty, embittered, and in Hollings' case, anti-Semitic. Both were given opportunities to back away from their rabid, inflammatory statements. Both refused. And both made headlines.

Lest my characterization of their remarks seems harsh, the following excerpts might be instructive. First, from Pelosi we heard the following about our wartime president.

Bush is an incompetent leader. In fact, he's not a leader...He's a person who has no judgment, no experience and no knowledge of the subjects that he has to decide upon . . . He has on his shoulders the deaths of many more troops, because he would not heed the advice of his own State Department of what to expect after May 1 when he . . . declared that major combat is over...Not to get personal about it, but the president's capacity to lead has never been there...In order to lead, you have to have judgment. In order to have judgment, you have to have knowledge and experience. He has none.

And then we heard this from Fritz, that other great Democratic Party statesman.

With Iraq no threat, why invade a sovereign country? The answer: President Bush's policy to secure Israel. Led by Wolfowitz, Richard Perle and Charles Krauthammer [all Jews, not coincidentally], for years there has been a domino school of thought that the way to guarantee Israel's security is to spread democracy in the area . . .

Bush felt tax cuts would hold his crowd together and spreading democracy in the Mideast to secure Israel would take the Jewish vote from the Democrats. You don't come to town and announce your Israel policy is to invade Iraq. But George W. Bush, as stated by

former Treasury Secretary Paul O'Neill and others, started laying the groundwork to invade Iraq days after inauguration.”

And this all came just a few weeks after Kerry's biggest and most important Democratic liability, his friend, mentor and fellow Senator from Massachusetts, Ted Kennedy, issued forth the following patriotic, wartime observation, directly comparing the actions of a few American prison guards at Abu Ghraib with the mass murders committed by Saddam Hussein.

Shamefully, we now learn that Saddam's torture chambers reopened under new management — U.S. management.

This problem is likely to be exacerbated throughout the campaign by quasi-Democrats from the entertainment industry who will, like Hollings, Pelosi, and Kennedy, make it hard for the anti-Bush forces Kerry now ostensibly leads to appear even remotely connected to reality. Last week, the incomparable Peggy Noonan wrote that she had been told by a journalist friend that focus group studies in Manhattan of all places are showing that “voters are lately consistently expressing broad and deep affection for President Bush.” If this is true, then the aggressive and vituperative attacks by Hollywood liberals will almost certainly not help Kerry's cause.

And there is exactly nothing that Kerry can do to stop such attacks. Over the weekend, for example, filmmaker Michael Moore, another man for whom self-control is quite obviously a problem, won the top prize at the Cannes Film Festival for his screeching, yet patently clichéd Bush-bash film, *Fahrenheit 9/11*. Though Moore claims that this work is “shocking” and rather modestly suggests that it will affect the outcome of the Presidential election, some who've seen the film say that it is little more than rehashed anti-Bush bile. David Schwammenthal of *The Wall Street Journal Europe* wrote the following of Moore's film last week:

All Mr. Moore's “undercover” crew could produce was footage of some soldiers putting hoods on Iraqi detainees, mocking a drunk Iraqi's erection and saying they like to listen to some stupid rock song to fire themselves up before battle. The rest of the movie is equally anticlimactic, mostly a rehash of the conspiracy theories in his book *Dude, Where's My Country*, which have been exposed as inaccurate, contradictory and confused.

Nevertheless, Moore intends to have the film distributed to theaters this summer and to have the DVD version ready for sale this October, just in time for the election and, more to the point, just in time to remind voters how truly and ridiculously demented the anti-Bush forces can be.

Of course, in the end, Kerry will likely have no one to blame but himself if the nation's voters are turned off by the irrational venom with which the President of the United States has been attacked by his political opponents. For no matter how smart Kerry's decision to lay off Iraq may have been, I have a feeling it will be short-lived. As with Kennedy, Hollings, Pelosi and the others, the urge to take swipes at President Bush is likely to be simply too strong for the presumptive Democratic nominee to resist.

When, for example, the President fell while riding a mountain bike over the weekend, a smart politician, one with the temperament necessary to run and win a campaign as intense as this one,

would have said something like, “That’s too bad. I hope he’s OK.” But Kerry couldn’t help himself and, with cameras rolling asked, “Did the training wheels fall off?”

Now, Kerry and the clever folks at the Democratic Underground and Moveon.com, undoubtedly think that quip was super droll. I suspect average Americans will not. And with nearly six more months of such vitriolic, irrational “drollness” to go, I think it is entirely likely that John Kerry will have a serious problem keeping his party’s anger from backfiring on him.

**IS INTERNICINE GOP WARFARE A PROBLEM?** In the estimation of the newswires, mainstream newspapers, and television networks, perhaps the most interesting “news” story in Washington last week was the eruption of intra-party combat between various factions of the GOP. The week began with a column by Bob Novak, which noted the growing alienation of certain Republican coalition members from the President, and ended with a “titillating” tale of a terse exchange of words between Senator John McCain and Speaker of the House Dennis Hastert.

Now, I know that the prospect of a war amongst Republicans during an election year captures the mainstream media’s imagination. But I suspect that these guys are barking up the wrong tree, and for the umpteen millionth time at that.

Let’s start with the McCain-Hastert spat. To make a mind-numbingly long story short, Senator McCain noted that war requires sacrifices and complained that cutting taxes during wartime was therefore imprudent. Hastert, in response, muttered some non sequitur about how McCain should visit the wounded soldiers to learn something about sacrifice in wartime and then noted that tax cuts keep economies strong, which is also important in wartime.

My first reaction when I read that Senator McCain had gotten into a scrape with a fellow Republican was, “Wow! Is it Thursday already?” If Mark and I had a dime for every time that McCain and another Republican had disagreed on a point of policy, tax policy especially, we wouldn’t have to worry that the SEC may ban the use of soft dollars, since we’d be set for life. Maureen Dowd’s breathless ranting about the impending collapse of the Republican Party notwithstanding, for all the news value in this particular story, the papers could just as easily have headlined it “Dog Bites Man.”

Of course, the Novak piece was notably more disturbing, i.e., the one in which he relays the story of Donald Devine, Vice Chairman of the American Conservative Union (ACU), who, sitting at the head table at an ACU Anniversary dinner two weeks ago, refused to either shake President Bush’s hand or join in the standing ovations for him.

Some observers, including Novak, found this to be disturbing because, in their view, it illustrated a crumbling of President Bush’s conservative base. I found it disturbing because it suggests two other things. The first is that the conservative “movement” has come to take itself far too seriously; the second is that Novak, the graybeard of conservative journalism, has fallen into the same trap as many liberal-left journalists before him, believing that somehow average voters need Washington elites to tell them how to think and how to vote.

In his piece, Novak acknowledges that 80-plus percent of Republicans have indicated that they are firmly dedicated to President Bush's reelection, and that the conventional wisdom says that this number reflects "extraordinary loyalty to the president by the GOP base." Then, however, he immediately dismisses the 80-plus percent, saying that the other 20% are a really big deal and that Don Devine's unhappiness is a troubling indication "that the president's record does not please all conservatives."

No offense, Bob, but the fact that "the president's record does not please all conservatives" is hardly breaking news. Conservative leaders, pundits, and think tankers have been complaining about George W. Bush forever, it seems. There have been complaints about government spending, about the cost of the war, about steel import policies, about the ridiculous largesse of the farm bill, about the fact that the first tax cut contained phase-ins, etc., etc. *ad infinitum*. And I know that these complaints have been made for years not simply because I remember them, but because Mark and I have made some of them.

If Donald Devine wants to be rude to the President of the United States in public because he feels that George Bush is not conservative enough, that's his business. Few would disagree with him that a good dose of Russell Kirk and Edmund Burke would do the President some good. But for Bob Novak to present this as big news is ridiculous. Devine thinks Bush spends too freely and that the federal government is growing too quickly? Well, join the crowd.

The fact is that none of this likely matters one whit to the average Republican voter. I have written at least twice during the Bush presidency (once for Lehman and at least once since rejoining Mark at The Political Forum) about the foolishness of trying to extrapolate the feelings of Inside-the-Beltway conservatives to the GOP base.

As manifold and manifest as the President's shortcomings may be, most conservatives generally agree that the alternative is so much worse as to be imponderable. And as for the average Republican voters, they too may not agree with everything the President thinks and does, but they know that he is right on taxes and right on terrorism, and that's almost certainly going to be good enough for them.

Believe me, Mark and I both understand all too well the urge to find something other than Iraq to write about each week. But having to resort to "Republican Vs. Republican" theme is more than a bit of a stretch. Indeed, were it not for the bombing of "wedding party" at which "'terrorist manuals,' machines for making fake IDs, and battery packs rigged for homemade bombs" were found, I'd say the intra-GOP squabble was actually the biggest *non*-story of the week. Just as it has been many, many times before

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