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## THEY SAID IT

Most countries in the Western world have stopped breeding. For a civilization obsessed with sex, this is remarkable. Maintaining a steady population requires a birth rate of 2.1. In Western Europe, the birth rate currently stands at 1.5, or 30 percent below replacement. In 30 years there will be 70 to 80 million fewer Europeans than there are today....In Japan, the birthrate is 1.3. As a result, Japan will lose up to 60 million people over the next 30 years. Because Japan has a very different society than Europe, they refuse to import workers. Instead, they are just shutting down. Japan has already closed 2,000 schools, and is closing them down at the rate of 300 per year. Japan is also aging very rapidly. By 2020, one out of every five Japanese will be at least 70 years old....

China and India do not have declining populations. However, in both countries, there is a preference for boys over girls....In China and India, many families are aborting the girls. As a result, in each of these countries there are 70 million boys growing up who will never find wives. When left alone, nature produces 103 boys for every 100 girls. In some provinces, however, the ratio is 128 boys to every 100 girls....The birth rate in Russia is so low that by 2050 their population will be smaller than that of Yemen.

Herbert Meyer, "What In The World Is Going On? A Global Intelligence Briefing For CEOs."

## DEMOGRAPHY AND DESTINY.

The great, global demographic story has become fairly commonplace among Wall Street seers, geopolitical pundits, and business forecasters. We chose the above "They Said It" quote not because it contains anything very different from myriad similar stories that are floating around in the public sphere, but because it does a nice job of summarizing the basic narrative, which has been popularized recently by the publication of Mark Steyn's book *America Alone*. We can't find the original source of the paper from which the above quote was taken, but the piece has been on the e-mail circuit for a long time now (we have received many copies), and deservedly so because it is a well worth reading (You can find the whole thing on the web.) Meyer is a smart guy.

We bring it up this week because, while we have touched on the grim facts of this extraordinary demographic story numerous times over the years, we have never really attempted to take a broader look at where all this might be going. The principal reason is that no one can possibly know. It is too big, too all encompassing. On the other hand, it is too big a story for us to ignore. So we thought we'd nose around the edges a little

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### In this Issue

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this week, addressing one small aspect of it, namely how the political elite in the nations that will be most directly effected by these demographic changes will likely react as the drama unfolds.

Before beginning, we would like to acknowledge two things. The first is that we are not all that confident that these nations will do what we think they will do. The second is that we are not saying that if they do these things everything will be hunky dory. Our purpose here is to get the gray matter working a bit on a collection of problems that are going to be around for a long time and eventually result in, as Steyn stated in the subtitle of his book, “the end of the world as we know it.” So here goes.

Russia is an excellent place to begin this exercise because the ruling elite there has already tipped its hand. Simply stated, the demographic tension in Russia comes from a combination of a badly shrinking and aging Slavic Russian population and a rapidly expanding Muslim one. The answer to the question of how the former will retain power in the face of the latter is simple. It will kill and brutalize those who cause trouble, whomever they are, wherever they are, and in whatever numbers are necessary.

Lately, the America press has reported several murders and attacks in Russia, London, and the United States on Russian journalists and political activists who have been critical of Vladimir Putin. These provide excellent insights into the nature of the Putin regime. But Russia’s actions in Chechnya, which include a brutal war, followed by widespread torture, illegal detentions, and showcase murders, are probably the best prototype of the means by which Putin and his successors will handle Muslim unrest and terrorism, should it threaten their control of the state.

The key to understanding this is to recognize that the ruling Russian elite is a criminal organization, not a government in the true sense of the word. The fundamental concern of this new ruling class is not to benefit Russian society, expand the global influence of Russian civilization, or to proselytize any particular political ideology. Nor is it to “take over the world,”

which was, as most Americans understood during the Cold War, the goal of the leaders of the Communist government of the old U.S.S.R.

Putin is a thug. He is a big-time thug, whose operational base is one of the world’s largest nations and whose criminal network extends across the globe. But he is still a thug. He is a not politician in the traditional sense. His dreams are not those of a czar or a Stalin or even a Khrushchev. His dreams are those of a bright KGB colonel who wakes up one day and finds that the old bosses are all dead and he is in charge. They are the dreams of a reasonably good chess player who finds that he is playing in a tournament of grand masters, the best in the world, and that, wonder of wonders, he is holding his own, that the skill levels of his opponents are far below what he had anticipated. Who knew that George Bush is a naïve dupe who would find nobleness in the eyes of a cold blooded killer, that the political leaders of the European community are cowards, and that he, Putin, a mobster who has no friends and has never had any, would suddenly be sought as a friend by most of the leaders of the world, including the aforementioned American president and the Pooh-Bahs of Europe?

What does it matter that “his people” are not breeding all that much and that the Muslims in his midst and on his borders are multiplying like rabbits? He has several advantages when it comes to this demographic challenge. He has a great deal of oil, gas, and nuclear technology to sell, which provides both money and “allies.” He is in contact with many powerful people around the world whose enemies are his enemies and are thus his ‘friends.’ He is unhindered by morals, conscience, or shame. And as a practical matter, there is no global force that can stop him from doing whatever he chooses to do.

Moreover, he has the support of a large percentage of the native Russian population, people who historically have strongly favored order and nationalism over individual liberty and honest government. He has a military force that may not be capable of wining a world war against the United States, but is formidable enough to intimidate his Muslim neighbors to the

South as well as his neighbors to the East, who have not only lost the will to reproduce but the nerve to fight. In short, take the odds and bet on Comrade Putin.

China's demographic problems are different from those of Russia, but the nature of the political leadership is much the same. Having closer ties to their communist roots, the Chinese leadership still has ideological conceits and nationalistic notions, but they are basically killers and thugs, not greatly different from Putin and his ilk.

The demographic tensions within China are, pure and simple, a rapidly aging older population and a severe shortage of young women to provide sex for the former and nursing care to the latter. Based on this formula, common predictions include a health and welfare crisis among the elderly, higher rates of crime and social disorder among the "surplus males," and a proclivity within the ruling elite for large armies, invented enemies, and possibly a big war, which would provide both a scapegoat for the nation's social ills and something for the angry and sexually frustrated young men to do rather than foment revolution at home.

Such a war could eventually be the answer, of course. But our guess is that the Chinese leadership will try other solutions in the meantime, since a big war would bring with it a host of other problems, including an economic setback of huge proportions created by an abrupt end to commercial relations with its largest and richest trading partner. And why, pray tell, would China want to go to war with a nation such as the United States, which would fight fiercely if attacked, but is basically run by fools who would likely surrender large chunks of global influence meekly in response to threats of war and promises of peace.

China's problem with its elderly, who have traditionally relied on their daughters and daughters-in-law to take care of them in their dotage, will likely be solved by two methods, euthanasia and neglect. As we noted above, the Chinese leadership is, like their Russian counterparts, not hindered by the niceties of moral

considerations. As for the social unrest caused by a surplus of young males, the Chinese leadership will, if necessary, rely heavily on police state brutality. They are good at it.

In the meantime, our guess is that China will attempt to mitigate the problem of surplus males by becoming a 21<sup>st</sup> century version of a 19<sup>th</sup> century colonial power, sending hordes of Chinese armies and bureaucrats, accompanied by American investment bankers from Goldman Sachs and Lehman Brothers, marching into all corners of the underdeveloped world in search of natural resources, adventure, empire, prestige, global power, and wealth beyond the dreams of Marlow and Kurtz "The reaches opened before us and closed behind, as if the forest had stepped leisurely across the water to bar the way for our return. We penetrated deeper and deeper into the heart of darkness."

History offers many formulas for such a venture. The French tried to turn Africans into Frenchmen. The Brits tried to turn Indians and Chinese into laborers and servants. The Spanish murdered, pillaged, raped, and stole whatever wasn't nailed down. The Chinese will likely try a mixture of all of these, with an emphasis on the Spanish formula, having a no regard for human life and an extremely chauvinistic attitude about the superiority of their own race.

This will go hard on the colonized peoples, and may even involve a little genocide here and there. Indeed the Chinese are refining their skills in this art form today in Sudan. On the brighter side, if China is occupied in the task of creating a global empire, it might be too busy to start a world war. Furthermore, if China pursues imperialism with real determination, it could eventually evolve into a poor, toothless giant, living off past dreams of global greatness, for the lesson of 19<sup>th</sup> century colonialism was that the profits of empire were less than the cost of its maintenance. Adam Smith put it this way.

The rulers of Great Britain have, for more than a century past, amused the people with the imagination that they possessed a great

empire on the west side of the Atlantic. This empire, however, has hitherto existed in imagination only. It has hitherto been, not an empire, but the project of an empire; not a gold mine, but the project of a gold mine; a project which has cost, which continues to cost, and which, if pursued in the same way as it has been hitherto, is likely to cost, immense expense, without being likely to bring any profit; for the effects of the monopoly of the colony trade, it has been shown, are, to the great body of the people, mere loss instead of profit.

Meyer mentions India in the above quote as having demographic troubles similar to those of China, i.e., aging population and a severe shortage of young women. Our guess is that India will be more successful in dealing with these problems than will China. This supposition is based on the fact that the Indian government is democratic, and thus more stable than China's, more popular with the general public, less corrupt, less vulnerable to social unrest and economic collapse, and less inclined to make monumental mistakes based on ideological residues of communism and a police state mentality.

Among other things, India's efforts to overcome its demographically related woes will likely be better organized, more efficient, less marked by criminal corruption, and better tolerated by the public. They will include emigration, economic development, hard work, national pride, and a large army based on the Roman premise, as stated by Gibbon, of preserving peace "by a constant preparation for war."

India will be fine, but Japan may be the only country in the world that will get it right. By this we mean that Japan's response to its huge upcoming demographic problems will center around a large adjustment in the life style expectations of its population and a concerted effort to keep the fundamentals of its culture and national principles intact by restricting immigration, maintaining order, and patiently addressing the problems as they come up.

Without question, Europe offers the most interesting, demographically related dilemma. Like Russia, it has a rapidly aging native population that has all but quit breeding and a large, rapidly expanding, aggressive, and ambitious Muslim population.

Unlike Russia, Europe will eventually surrender effective political authority to a variety of "moderate" Islamic factions within its various nation-states, agreeing to "share power" in exchange for promises from these "moderates" to bring the radical Islamic mobs in their cities under control.

It is important to understand when considering this that Islamic terrorism comes in two forms. The first is the random act performed by an individual or small group of individuals acting alone for the purpose of pure vengeance and the satisfaction of seeing one's enemies suffer. The second type is organized, methodical, and aimed at achieving a specific goal. This is the tool that the "moderate" Muslims in Europe will use to force the European leaders to surrender to their demands for a piece of the action.

This Islamization of Europe will take a long time. It will most probably happen state by state, with some holding out longer than others. In any case, it is likely to be marked by extensive periods of violence and terrorism. There will be interludes when the Europeans will fight back with harsh, police state tactics similar to those that will be employed by Putin against the Muslims in his midst. But the Europeans will eventually lose heart. Along the way, the process will be facilitated by capital flight and the emigration of large numbers of educated Europeans to safer and more prosperous havens.

Rather than worrying about the drowning Polar Bears, the world's liberals may one day concern themselves with the more immediate problem of preserving the treasures of Western art that are kept in such places as the Louvre and the Prado from desecration and outright destruction by the Muslims who will be in effective control of these institutions. Conservatives can worry about Vatican City and the Christian

treasures therein. One can only hope that the whole lot will fare better than the 2,000 year-old Buddhist statutes that were demolished in Afghanistan by Muslims who viewed them as “false idols.”

## SERIOUSLY UNSERIOUS.

Over the past several weeks, political commentators of all stripes, but conservatives in particular, have been tying themselves in knots trying to explain Rudy Giuliani’s widespread popularity within the GOP. How is it that a socially liberal, gay-friendly, thrice married, pro-choice, fall-away Catholic is leading all the early 2008 Republican presidential polls, and by a wide margin? How indeed does a moderate Northeasterner who has never held a state-wide office, has never even completed a campaign for state-wide office, come to be the frontrunner in a party that fetishizes experience and persistence and is dominated by Southern and Western conservatives?

Some have taken this as evidence that the influence of the ‘Religious Right’ is on the wane, that “real” conservatives have had enough of the “religious” conservatives and are pushing back. Some have hinted at a semi-secret bargain between Rudy and social conservatives, whereby he’ll appoint judges to their liking, if they simply look the other way at his questionable personal and policy predilections. Still others have argued that for all his purported social liberalism, Rudy is an “effective” conservative, whose policy positions, while somewhat unorthodox, nonetheless advance conservative goals and will do more to foster the concept of “liberty” than those of any of the other big-name candidates.

All of this is well and good, and there may be at least a nugget of truth in each of these explanations. But for our money, Giuliani is doing well simply because he is, at this point, the most serious candidate around. And voters – at least GOP voters – understand that seriousness is a characteristic that this nation will need in its next president.

Certainly every age is serious in its own way. And we are hardly presumptuous enough to believe that somehow things are worse, or more serious today than they have been at any time in the past. But the condition of the world and the gravity of the problems and challenges facing the nation today do in fact seem quite serious, in part, because of temporal proximity, but in even larger part because of the utter and incontrovertible “unseriousness” of the politicians who are putting themselves forth as solvers of these problems.

*The Wall Street Journal’s* Daniel Heninger used his column last week to lay part of the blame for this general atmosphere of unseriousness at the feet of modern retail politics, suggesting that our best-known and most important politicians ignore the serious issues in part because they are too caught up in the “full-tilt boogie toward the office 11 months before the primaries and some 600 days before the nation chooses a new president.” Rather than worry about “Iraq’s future, Iran’s bomb, homicidal Islam, conniving North Korea, unhelpful Russia, rising China, booming India, Venezuela’s oil, Mexico’s human export,” or, more generally, about “the proper role of the presidency,” our big-name politicians appear content to plan photo-ops and woo potential primary voters.

Heninger is right, of course, as he most often is. But in our opinion, he doesn’t go quite far enough. After all, the unseriousness of the political debate extends far beyond the presidential race and the presidential candidates, affecting the entirety of the political debate, from Capitol Hill to the state houses to the White House and to the respective party headquarters. While it’s possible that presidential wannabes are more predisposed to be unserious, they hardly hold a monopoly on the practice.

Take, for example, New York’s senior senator, Chuck Schumer, the man responsible for organizing the Democrats’ campaign to take back the Senate last year and one of his party’s most visible spokesmen. On what has Senator Schumer been focusing his energy lately? Iran? North Korea? The looming crisis in

entitlement spending? Well, no. Schumer has instead been running around the country griping about conditions at Walter Reed Army hospital.

Now, in and of itself, this focus is hardly indicative of an unserious temperament. After all, the nation is at war, and the treatment of returning soldiers is an important facet of maintaining the spirit and morale of the armed services. The problem is that Schumer isn't really interested in addressing the troubles at Walter Reed. He's interested in blaming them on President Bush and, more to the point, on exaggerating both the scope of the problem and the President's culpability in it. Schumer has been telling anyone who will listen that Walter Reed is "the Hurricane Katrina of 2007." We're not sure what we find more galling about this: the idea that the Senator would try to blame veterans' health care, a longstanding bureaucratic joke, on an administration that has served just over six years; that he would liken an aging hospital to a natural disaster that killed hundreds and displaced hundreds of thousands; or perhaps that that he thinks the American people are dumb enough to believe any of this.

Of course, as galling and condescending politicians go, Schumer is hardly alone. Indeed, most of his Democratic colleagues have opted not to argue against the Iraq war on its own terms, but rather to use simplistic and unserious analogies, most of which showcase either their own logical and historical ineptitude or a fundamental contempt for the American people. Two weeks ago, Ted Kennedy, the liberal "lion" of the Senate and the scion of America's political royal family, mocked the idea forwarded both by the administration and by "experts" that an American pullout from Iraq would lead to a "great bloodbath." "I heard the same kinds of suggestions at the time of the end of the Vietnam War," Kennedy declared, indicating that those "suggestions" were wrong then and are equally wrong today.

As *National Review's* Jonah Goldberg suggested, someone should rent Kennedy and his fellow bloodbath-denier Chris Dodd (who, it turns out, actually *is* running for president) a copy of "The

Killing Fields." One would guess that the millions of Southeast Asians who fled their homelands after the American withdrawal would tend to disagree with these two august buffoons, as would the millions slaughtered in the wake of the American surrender. As we've noted time and again, the Democrats still revel in America's defeat in Vietnam and seem keenly interested in seeing it duplicated in Iraq, a position that requires a healthy dose of both ignorance and self-absorption. Yet somehow their ignorance and arrogance never cease to amaze.

And even those who are smart enough to know that the standard liberal line on Vietnam is absurd are not immune from taking the Iraq war just as unseriously. Two months ago, Freshman Senator and erstwhile Republican Jim Webb, who, it can be said, despises the likes of Kennedy and Dodd where Vietnam is concerned, nevertheless did almost precisely the same thing they did and proved himself equally unserious (despite his *very* serious voice) in his national response to President Bush's State of the Union address. Webb, you may recall, cited Dwight Eisenhower as an example for how a president should respond when a war is stalemated. Eisenhower, Webb intoned, "took the right kind of action, for the benefit of the American people," by bringing "the Korean War to an end."

The only problem with this analogy is that it is as ignorant and unserious as Kennedy's. Yes indeed, Eisenhower ended the Korean War. But do you suppose that Webb knows that 50 years later, the United States still has roughly 40,000 troops on the Korean peninsula? Or that the enemy whom Ike left undefeated now possesses nuclear weapons and is arguably one of the greatest threats to global stability? Other than those minor technicalities, though, we suppose it's fine for Webb to celebrate the "end" of that war and to urge similar action on President Bush. He just shouldn't expect anyone to assume that he's serious, since clearly he isn't.

Unfortunately, this foolishness is hardly confined to the Democratic side of the aisle. Many Republicans have also decided that the war in Iraq is simply

too costly and too complicated to merit their support. And like their Democratic colleagues, these Republicans would nonetheless prefer not do anything too difficult or potentially regrettable about the war. So instead they prattle on endlessly, talking to hear their own voices and contributing nothing either serious or germane to the dialogue.

The GOP's king of pointless prattling is Nebraska Senator Chuck Hagel, who fashions himself a foreign policy guru yet actually believes that it is his "constitutional duty" to pontificate on and vote for "nonbinding" resolutions condemning the commander-in-chief in the middle of a war. He sees nothing unserious or inconsistent about slamming the "surge" in Iraq one day, while voting to confirm the general who will lead said surge the next.

Now, we are hardly able to provide a comprehensive run down of every politician who is proving shockingly unserious about a serious world. Such a list would be staggering in length. But what concerns us is not so much the unseriousness as the cause of it. As we said earlier, Heninger's thesis about the constant campaign makes a certain amount of sense. But it fails to explain the fact that the problem is pervasive in American politics today and not confined to presidential candidates. And the bipartisan nature of the problem indicates that ideology is not the cause. So what is?

In our estimation, this question is perhaps best answered by taking a quick look at the other purportedly "serious" potential GOP candidate, the guy who, in addition to Giuliani, has the drawn the attention of serious-minded GOP strategists and sympathizers, namely former Speaker of the House Newt Gingrich.

At first blush, it's easy to see why Newt's star continues to shine so brightly in the eyes of many of the Republican Party's elites, despite the fact that he has been out of politics for nearly a decade and is the only potential GOP candidate whose public approval numbers are but a fraction of his public "disapproval" numbers. On policy matters, Newt is serious. Indeed,

as Republicans go, no one is more serious. And no one else in the conservative movement is better at articulating conservative principles or crafting conservative positions on questions of politics and policy. To this day, Newt remains one of the most engaged and innovative thinkers on the most serious issues of the day. If you're looking for a serious answer to a serious question, there is no doubt that Newt's the guy you want to ask.

All of that notwithstanding, much of Newt's "seriousness" is a pretense. Behind the serious veneer, Newt, like many of the rest of the politicians of his generation, is just a little too concerned about himself and his image to be truly serious. Whether it's the fact that he had an affair with a young House staffer in the midst of the most serious event of his speakership (the impeachment of the Bill Clinton) or that he thought his affair was important enough to the American public to "confess" it last week to evangelical icon James Dobson, Newt's actions – not his ideas, mind you, but his actions – virtually scream "Baby Boomer politician."

And this, we think, is the answer to the question about the origin of the current unseriousness. It is no accident, in our estimation, that the purging of seriousness from American political debate coincided quite closely with the political coming of age of the Baby Boom politicians. On both the right and the left, this strange species has an over-inflated perception of its relevance to the political process, of its "uniqueness" to American politics, and of its value and importance to the nation.

Additionally, Boomer politicians tend to see the end goals of politics differently than did their predecessors. It is not that they want different things than did previous generations. It's that they want these things for different reasons. Whereas the accumulation of power was once an end unto itself, with the Boomers it seems that power is only a means to an end, and that end involves having the entire world – or as much of it as possible – acknowledge their brilliance or greatness, or some such attribute.

Bill Clinton spent his entire presidency worrying about his legacy, pondering the question of how he would be remembered. And while he may have been the vainest of the Boomer politicians, his experience is in many ways typical of his generation.

Three years ago, in the immediate wake of the 2004 presidential election, we offered a little unsolicited advice to the losing party. “The Democrats,” we wrote, “should seriously consider removing any and all liberal Baby Boomers from positions of power and responsibility within the party. And certainly they should never consider nominating one for President again.” The predilections and obsessions of liberal Boomers tend to distract the Democratic Party from the issues and policy positions that the public finds most comforting when the world appears dangerous. Bill Clinton is fine when a mild recession is the most serious problem on the horizon. But he and his ilk are woefully inadequate when there are real problems to be addressed. And the same, unfortunately, applies to erstwhile conservative Boomer politicians, though probably not to as severe a degree.

If we are right about this; if the cause of the current spate of political unseriousness is generational, then we can confidently make at least two predictions.

First, things are not going to get a whole lot better anytime soon. For all of the flack he takes from his critics for his “arrogance,” George W. Bush is, in many respects, the least typical prominent Baby Boomer politician around. Arrogant he may be. (And what man who believes that he should be president isn’t?) But he at least appears remarkably unconcerned about others’ perception of him. We’re not sure if we’d attribute that to his religiousness, to his status as a recovering alcoholic, or to some other, unknown

attribute. It really doesn’t matter. Whatever the cause, George Bush seems largely impervious to the slings and arrows of his critics and equally unconcerned about how much or even whether the people of the world admire him.

The next Boomer president is unlikely to be similarly disposed. Therefore, the next Boomer president is likely to make his or her decisions less with an eye on principle and more with an eye on the polls. In a serious world, that is potentially very dangerous.

Second, there is a reasonable chance that someone heretofore not part of the presidential picture will emerge and launch a challenge for one of the nominations. Recall that this piece started with a question about Rudy Giuliani, who at this point, appears to have differentiated himself from the crowd with respect to his seriousness on the issues that resonate with Republican voters. But while Giuliani is not technically a Baby Boomer, he suffers from many of the same idiosyncrasies and is thus liable to lose both his perception of seriousness and his lead at the polls. The same can be said for John McCain, who appears to have fallen into the same trap John Kerry fell into, believing that biography trumps all else and that fixation on an impressive biography can mask other political shortcomings.

Republican voters and voters in general will, we believe, become more concerned about their candidates’ seriousness as the primaries approach. And that is as good a reason as we can imagine to expect that someone else, someone more serious will eventually get into the race. If not, we can only hope that seriousness will come to the next president when the shooting starts.

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