

The Continuing Storm

by George Friedman - January 7, 2022

It has been about two years since “The Storm Before the Calm: America’s Discord, the Crisis of the 2020s, and the Triumph Beyond” was published, and about three years since I submitted it to my editor at Penguin Random House. As 2022 begins, I’d like to summarize where I think we are.

Let’s begin with the **American institutional crisis**, which is intensifying. Historically, institutional crises in the U.S. are generated by wars – the American Revolution, the Civil War, World War II – in 80-year intervals, each creating different structures for managing the federal government. This time is different. 2025 will be 80 years since the end of World War II. But our institutions are already shifting, driven not by war but by COVID-19.

World War II was won by experts, and in its aftermath, experts were placed at the center of governance. The weakness of expertise is that experts are structurally narrow. They know their fields brilliantly but can’t know the whole. COVID-19 places medical experts at the center of things. But as I have argued, their expertise could address the medical problem (and I think they have done fairly well), but they are institutionally indifferent to the consequences of their solutions outside their field. Their institutional solutions created massive disruption, from developmental problems in children due to distance learning and no social interaction with each other to enormous economic and social problems. The **supply chain crisis** continues to threaten huge economic dislocation. The social tensions that have arisen have intensified political divisions in the United States and elsewhere, as well as individual frictions that can be seen clearly in air travel. The pandemic generated a range of problems beyond the medical sphere, and some of them had deep ramifications for the future.

I argued in my book that expertise is necessary, but that there was no systematic method of bringing other areas of expertise to bear, and in particular no institution that could oversee the multiple and sometimes contradictory areas of expertise. The office of the president is incapable of carrying out this function. George Washington created the Cabinet to support the president, but the Cabinet is almost moribund while any president is limited. What is needed is institutionalized common sense. Common sense can see beyond any single solution and measure the net result with a sense of the future of the commonwealth. An institutional shift will take place that controls expertise without dispensing with it.

We are seeing the institutional problem all around us, with the economy, society and polity. I think we can see a solution, but as with war, the fog of an institutional shift remains, and the crisis will deepen in multiple areas before a solution is forced on the system. We are getting there but are not there yet.

The social and political crisis is obvious. The country has split into two political camps that hold each other in utter contempt. Congress is almost evenly divided, and there is no clarity emerging politically, nor any common understanding on any issues, which means that the pressure on the decaying institutional system will intensify. Looking back at the late 1960s and 1970s, the last socio-economic shift, we see violent riots, frequently pivoting on race, and an economic system of intensifying inflation, presidents forced from office or impeached and so on. I would benchmark us at about 1975, with the violence declining a bit, the economy seeming to be out of control, and the political system incapable of functioning and trying to absorb defeat in Vietnam while coping with the Soviet Union and China. The major difference this time is the labor shortage, whereas in 1975 the problem was unemployment.

President Gerald Ford could not get control of the government or deal with the problems. It was not his fault, but the time was not right – the social and political system was not yet unsustainable. The idea was taking hold that the nation ought to reach back into the Roosevelt era and solve the problem that way. Thus, Jimmy Carter was elected, and he decided to cut taxes on the lower- and middle-income classes, at a time of inflation. It had an inevitable effect and delegitimized the Roosevelt era. Ronald Reagan was elected next, and without fully understanding what was happening, he presided over the opening of the new era.

The institutional, social, economic and political crises are in full view now and resemble much of the prior cycle. Presidents do not make history, but they do preside over it, the best managing the system to go where it must. If history follows the past, which it does not do in detail, the 2022

elections will further make the system unworkable while the crisis intensifies. As the last cycle reached back to Roosevelt, the 2024 election will likely reach back to Reagan, at least in spirit. The spirit won't work, and I would guess that 2028 will bring to power the heir to Jackson, Hayes, Roosevelt and Reagan, none of whom knew how to solve the problem, but will preside over the problem resolving itself, both institutionally and socio-economically.

The hard times aren't over yet. Isolated expertise continues to rule, and our animosity for those different from us politically, socially and racially will not give up.

So far my forecast for this decade has worked out, but there is ample opportunity for me to be proved wrong. I rather hope I am wrong, but I can't deny a counter wish for being right.

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