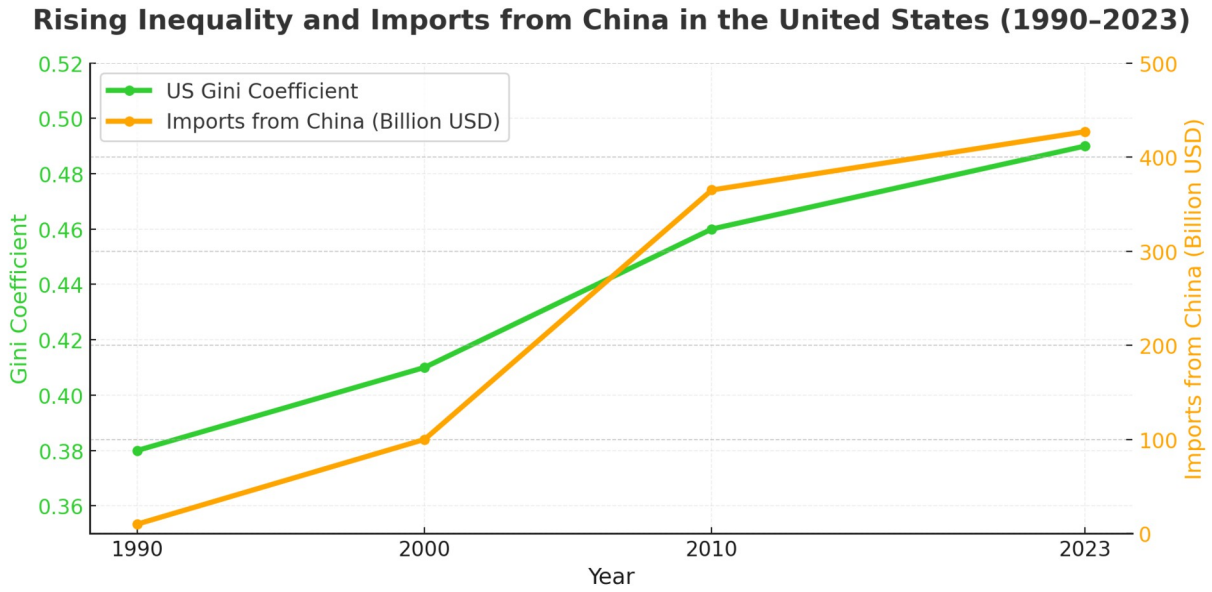
The “Physics” of politics: A visual reconnection to reality

1. Trade & Inequality: United States

Chart: US Gini coefficient vs. imports from China

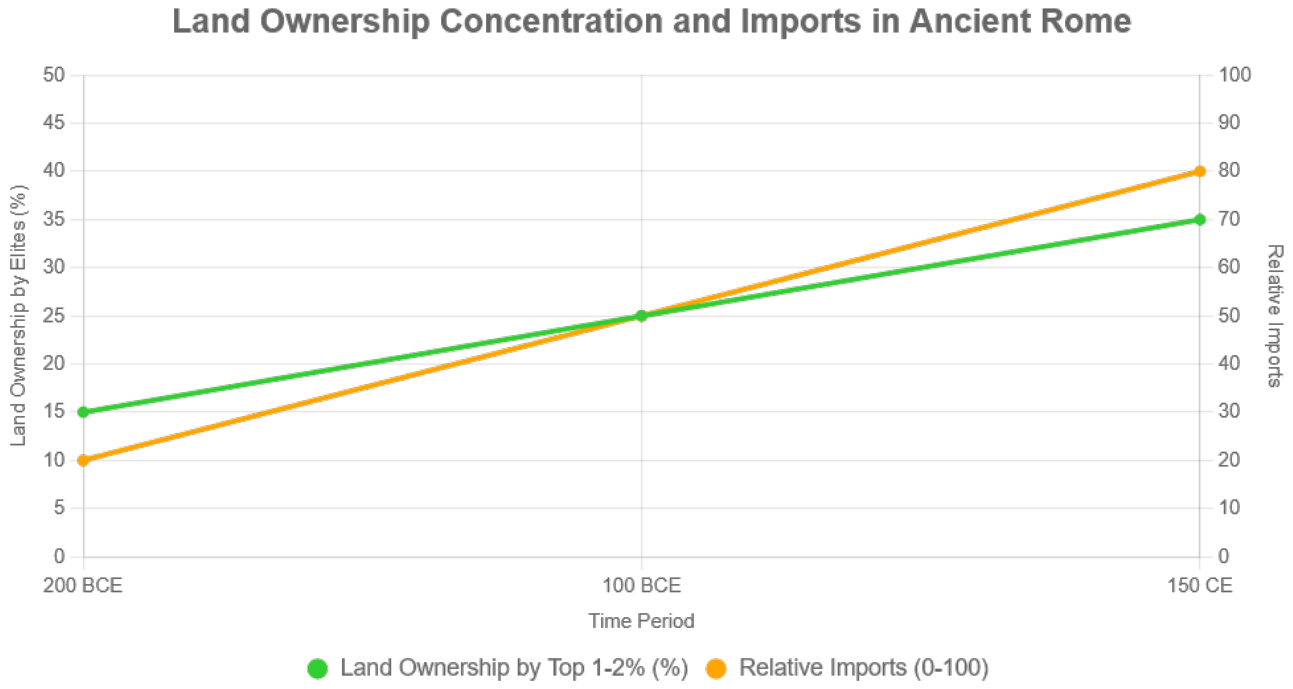
When material inputs shift, so does wealth distribution. Over the last few decades, rising imports have tracked closely with rising inequality.



2. Wealth Concentration — Ancient Rome

Chart: Rome land concentration vs. imports

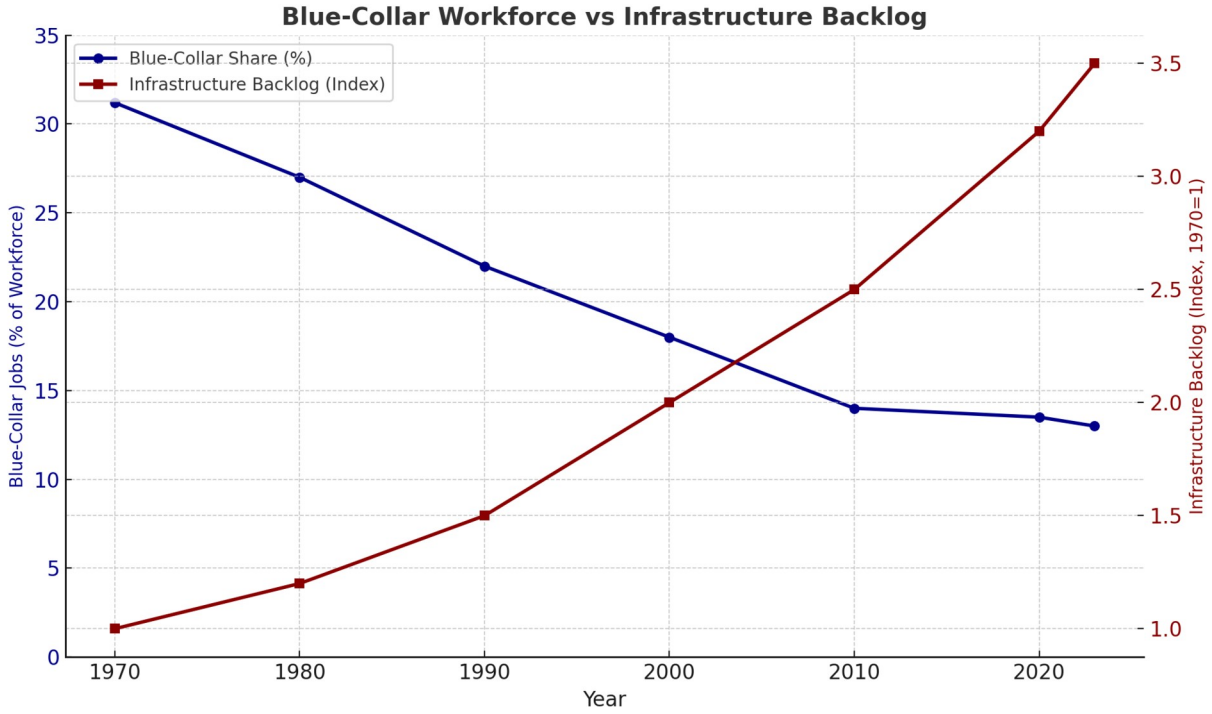
This isn’t new. In Rome, imports and land concentration rose together, weakening the smallholder base that had sustained the Republic. The physics of dependency hasn’t changed much in 2,000 years. that had sustained the Republic. The physics of dependency hasn’t changed much in 2,000 years.



3. Productive Labor & Maintenance Backlog: Modern US

Chart: Blue Collar labor vs. infrastructure backlog
When productive labor shrinks, the capacity to maintain infrastructure shrinks too. Scarcity pushes costs up, but the backlog still grows. GDP can rise even while the physical base shrinks, because it counts all economic activity even work that replaces lost capacity as growth.

As the metrics get more complex, it's easy to start chasing the number instead of the reality. The models might say the system is healthy while the physical base is quietly eroding and you can go crazy trying to square the two. The chart then does not show causation only a growing disconnect between capacity and need.

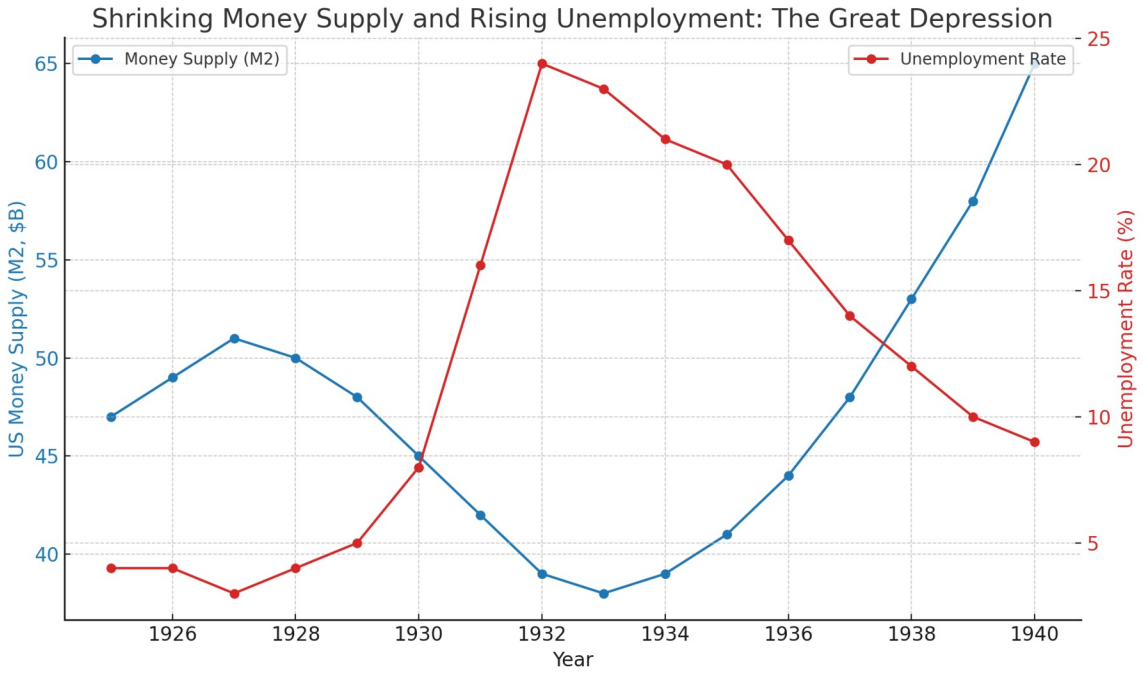


In the Great Depression, the situation was almost the reverse: plenty of labor, but no demand. In both cases, if one part of the circuit is missing, the system stalls.

Civilization runs on abundant cheap labor and energy, In the past cheap labor meant peasants, slaves, serfs, or low-wage urban workers. Productivity gains mostly came from squeezing more output from that labor, not from valuing it more highly or efficiency and non human energy. Skilled roles existed, but were rare and tightly controlled artisans, master builders, military engineers. The majority of the population was replaceable muscle.

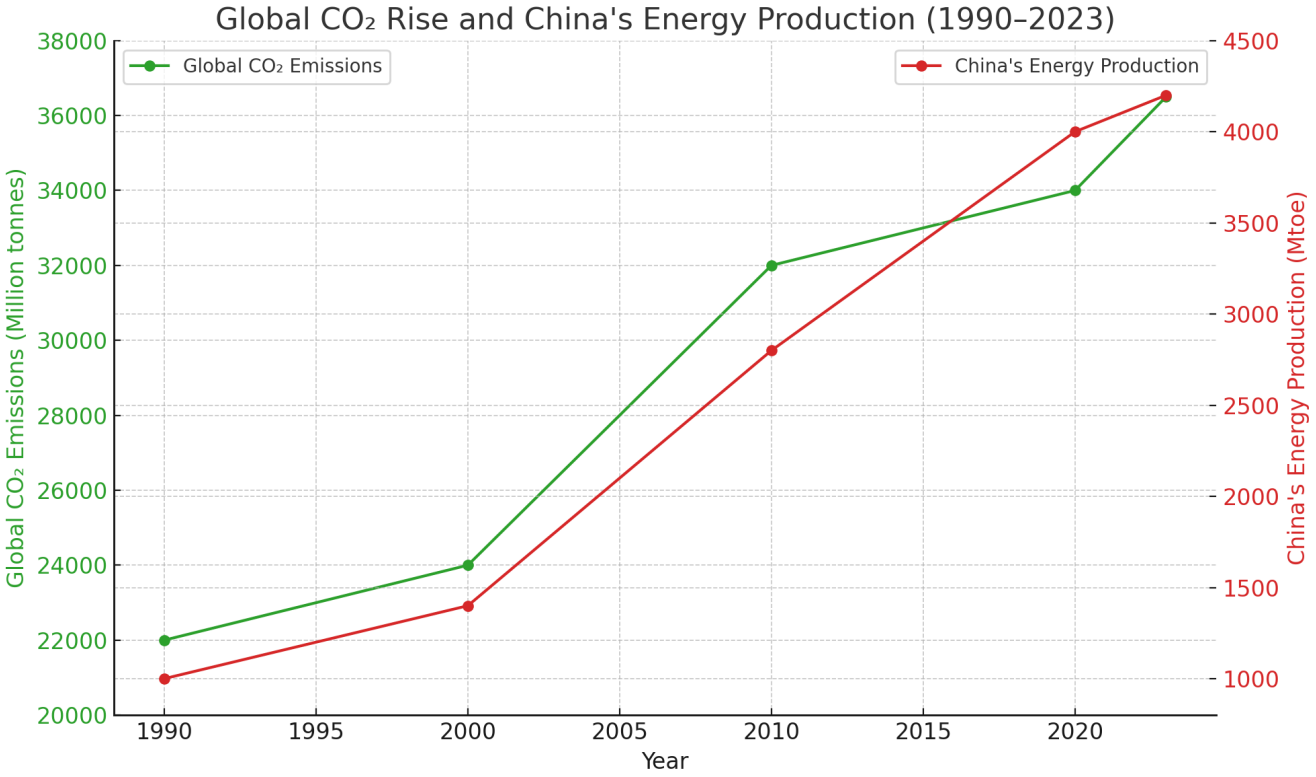
After WWII, a few major shifts converged Wartime destruction and mobilization left the U.S. and parts of Europe short of workers. Cheap fossil fuel energy and machines had replaced horses and brutal labor. The GI Bill, union strength, and wage bargaining raised labor's share of national income. College attendance surged, creating a large pool of engineers, scientists, and technically trained managers. This made capital investment far more productive better machines paired with a workforce that could use and maintain them. Roads, power grids, water systems, ports, and factories built or rebuilt with high-skill input and high labor valuation. Labor efficiency gains and consumer demand fed back into each other, reinforcing the boom.

Then the slow turn in the 1970s and1980s globalization and automation began eroding domestic labor's scarcity premium. In the 1990s and 2000s: Offshoring and financialization shifted focus from production to capital returns. This undercut the value of labor but also undermined the infrastructure



4. Energy & Geopolitics

Chart: Global CO_2 vs. China's energy production
Inputs and outputs are tied together. As China's energy production surged, so did global CO_2 emissions. T



Closing Thought:

For most of history, civilizations have run on some form of cheap labor. When that base erodes whether through progress, demographics, or politics costs rise, and systems built on cheap inputs strain.

“Value is subjective” works fine for pricing consumer goods, but when applied to labor it can be dangerously misleading.

Labor especially skilled, coordinated, motivated labor isn’t just another input you can swap out like a raw material. It’s the engine that turns capital, resources, and plans into functioning reality. Treating it purely as a commodity Encourages short-term cost-cutting you optimize for the cheapest available labor now, without accounting for the long-term loss of skill and institutional knowledge. Misses the compounding effect of competence a good crew with good leadership doesn’t just work faster, they prevent errors, extend asset lifespans, and innovate better processes. Ignores replacement lag you can buy steel in a week, but you can’t replace a generation of master welders or linemen in less than a decade. Creates fragility, when labor is just “another cost,” it’s easy to offshore or downsize it until you hit something you can’t offshore, and discover the capability is gone.

The real stress point comes when neither the rich nor the poor have skin in the game. That’s when maintenance turns into managed decline and entropy wins.