#251: The case for one billion Americans, & more (Matt Yglesias)

Julia: Welcome to Rationally Speaking, the podcast where we explore the borderlands between reason and nonsense.

I'm your host, Julia Galef, and my guest for this episode is someone who I know many of you have been wanting me to get on the show for a while -- Matt Yglesias, co-founder of Vox.com, author of several books including most recently "One Billion Americans: The case for thinking bigger." And Matt is now publishing an excellent blog and newsletter at slowboring.com. He describes it as being a site for people who are interested in finding out what's actually true about American politics and public policy, not just what flatters your biases. And I can endorse that description. I almost never subscribe to anything, but Slow Boring is one of the few exceptions I make.

So Matt and I cover roughly three topics in this conversation: First, Matt's most recent book, One Billion Americans, in which he argues that it is in the national interest of the United States to dramatically ramp up our population growth, by allowing more immigration and by having more babies.,Second, the YIMBY movement, which argues that we should be building a lot more housing, especially in expensive cities, which is something Matt has also written extensively about, and I throw some of my best YIMBY critiques at him.

And third is a topic that might sound a little more out-of-left-field -- the Iraq War. The impetus for this was that I have recently been trying to figure out where I went wrong in supporting the Iraq war back in 2003, and I remembered that Matt had also supported the Iraq war at the time, and of course now, like me, thinks that was a mistake. So I asked Matt if we could compare notes on how we both got that one wrong.

I really enjoyed this conversation and I'm excited to share it with you -- so without further ado, here is Matt Yglesias.

Matt: ... So *One Billion Americans* says that the United States grew to be a great power historically by having a large population to go with its large landmass.

And that looking ahead to the future, we should continue on that trajectory, and aim to roughly triple our population over the course of the 21st century. That this is going to make us a sort of richer, more prosperous, happier society here at home, as well as maintaining our lead in international competition.

And then the book, it goes through a lot of specifics, like how do we get the housing to accommodate that? How do we get the transportation infrastructure to accommodate that? How do we do more to support people who want to have children? How can we redesign the immigration system so that more people can come here in a politically sustainable way?

And yeah, One Billion Americans. It's a nice round number, but also has some ideas behind it.

Julia: I have to say I'm kind of surprised that the U.S. Government hasn't been pushing for population growth to make us more powerful. Even if all you care about is the U.S.'s role on the world stage, and making sure we continue to be number one... why haven't they been trying to make us bigger?

Matt: I mean, historically we did. George Washington, Alexander Hamilton were big proponents of encouraging immigration.

People know all of Abraham Lincoln's famous speeches, where he has really great turns of phrase. His message to Congress in 1864 is not as good as the famous Lincoln speeches, but the content of it is all about how not enough people from Europe want to immigrate to the United States, because they are concerned about sort of scammers running the shipping lines.

Julia: Oh wow.

Matt: And that we need to pass... he had some proposal in Congress that he wanted to pass, to improve the credibility of the information flow, about how good it was to come to America, and to reassure people that they wouldn't be immediately conscripted into the war.

But he tied that to the war effort. He said that whether or not the immigrants go serve on the front lines, they are building up the strength of the country. And it's going to be an important part of winning the war and an important part of this sort of post-war rebuilding of the economy.

And the whole point of the Homestead Act, which -- the politics vis-a-vis the indigenous population are now tricky to articulate in a humane way today... But the idea was that we wanted a lot of people to settle on that land, right? That that would be a more prosperous kind of country.

And then, go back to the immigration reforms in, I think it was 1962. They were discussed both in anti-racist terms at that time, but also in “This will be good for America,” we are in sort of big time, cold war competition with the Soviet Union. We could use more people.

The United States has not traditionally had the kind of pro-natalist for national security politics that you saw in 19th century France, or sometimes in other countries. I think most Americans find that to be a little creepy. And I to an extent agree.

But also the United States used to have a lot of children, more children than other Western countries. And that has sort of ebbed away right now. And I think it's worth asking sort of why that is. And it connects to a lot of very normal kind of progressive Democrat stuff...

Julia: I do want to get to that. But I guess I'm still confused about why... We have this national security establishment, they're obsessed with maintaining US hegemony. They've seen that the birth rate is dropping. They've seen China is getting bigger and richer.

Why haven't they been pushing for, if not pro-natalist policies, then more immigration? For the sake of our hegemony?

Matt: Yeah I don't know. I mean, I hope they will. I am trying to enlist them in my cause. They have a lot of clout in Washington.

Julia: Well I think I read the other day that the, some of the most, among the most followed Twitter accounts in the incoming Biden administration staff is Matt Yglesias. So maybe you will have some real influence.

Matt: That's the dream.

Julia: Ideally, would our population growth from immigration come just from high-skill immigration because high-skilled immigrants have the highest ability to contribute to our economic growth? Or what balance of high versus low skill immigration do you think is ideal?

Matt: I mean, you can really argue it both ways, right? Because the low skill immigrants sort of need the help more...

Julia: Yeah, I was thinking just from the self-interested perspective of American success.

Matt: Yeah. So, you can sort of argue it both ways. I mean, I do think that skilled immigrants are more "useful" in that sense, right? If you had to only have... if you hold the number of visas fixed, then switching the composition to emphasize skills more would be good for America. Probably bad for the world. I feel kind of torn about that.

But I mean, I do think that the answer ultimately is to expand the total quantity of people who are coming. And then you can maybe alter the composition of the flow internal to that.

That being said, I do think that less skilled immigrants are a little bit underrated. Both because as I said, our German inventors saving the world were not necessarily coming through special skills programs, nor was Steve Jobs' father, for example, a "skilled immigrant." We have a lot of great stuff being done by refugees and their kids.

Also, I mean the low status work that people do, cleaning houses and taking care of kids and stuff like that, is actually very important to the labor supply of more skilled people. There's a more tight interconnection between those things than is always realized.

I think fundamentally it comes down to politics, right? The big question of immigration in the developed world is how much openness can we have before we provoke a political backlash that takes everything in the Trump-Le Pen direction and totally upsets the apple cart.

My newsletter, slowboring.com -- it's inspired by Max Weber. And one thing I try to do is take politics seriously, as not just a, like, "Oh, this shitty politician doesn't want to do the right thing because he's trying to win elections." But who wins the elections is actually very important. And so modulating your approach so that you don't let the worst people in the world into office is worth thinking about.

Julia: Right. Well, that was another reason that I was thinking, in an ideal world we would drastically increase high-skilled immigration. Because not only do high-skilled immigrants contribute proportionally more to innovation and GDP growth, but it also seems so much less unpopular than low skilled immigration.

I read one poll recently that a large majority of people support increasing high-skilled immigration -- but even a majority of people support high-skilled immigration, even among just the people who want less immigration overall.

Which is a really striking finding. So that would seem like a promising direction if you wanted to start boosting immigration without provoking a political backlash.

Although, I'm still left with the question of, why haven't we done this already? I'm actually genuinely confused. Why is this not... It's a policy that's good for our country. It seems very popular. What's going on? Why haven't we boosted high-skilled immigration?

Matt: Yeah, so this is... I'm glad to be on your show, because I am trying to become more of a rationalist myself in life.

Julia: Oh, that makes me so happy!

I actually -- not to go off on a tangent, but one of the things on my list of notes was, I feel like I've noticed you doing more and more things recently that make rationalists happy. Like sticking your neck out and making concrete predictions. Steel-manning arguments you disagree with. Retracting claims when you don't think that they're justified.

I mean, not that you never did that stuff in the past. But I feel like I've noticed an uptick, and I was going to ask you if that was intentional. And if so, why?

Matt: Yeah. I mean, this is, I am trying to do better. Especially as a more independent voice...

Julia: I'm beaming right now.

Matt: I mean, so there's pros and cons to not working with a big team of managers, right? One of the pros is that you could be weirder if you want to and be like, "Okay, here's my." Because just when you're writing articles for a conventional -- I mean, and I still do. I write columns for Bloomberg. You're expected to conform to the house style of the publication... An editor is going to be like, "Well, what are you doing with these little percentages in your forecast?" And it's a whole big fight. So independent, I can do more of that if I want to.

But also, you're not accountable to editors, to a management structure. And I think it's important for me to think more seriously about how am I going to hold myself accountable. And like, that's the whole point of the tools and practices the rationalist community has been developing. So, I want to embrace more and more of that as I sort of dive deeper into this kind of world.

So on the immigrants point, I used to be very skeptical of the political claims on behalf of more of a high skill focus. And I realized at a certain point that I was stretching to kind of conform myself to the Democratic party coalition's views. And that the evidence is in fact really quite strong that skilled immigrants, don't just poll better, but that there's actually less backlash.

There's some good papers looking at... You can look at the specific geography of Europe, right? And areas that disproportionately get skilled versus low skilled immigrants have less backlash. Canada has much less anti-immigrant backlash than other places.

So I think this is really piling up. And for a long time, the conceit in the Democratic party was that they should not allow any immigration policy change to go forward -- for example, an expansion of skilled migration -- unless it came with the entire kit and caboodle of comprehensive

immigration reform. That the business community was eager to lobby for more skilled immigration. And it was important to not give them what they wanted, unless you could rope it into this whole thing that would give the immigration rights community what they wanted.

That almost worked. I mean, I don't think it's good to just scold politicians for doing politics. In 2013, we almost got a really, really good immigration bill passed, that would have treated the 11 million undocumented residents in a really generous way, done great things for the economy in terms of high-skilled immigration, a bunch of other good stuff.

But ultimately it didn't work. And at this point because of polarization, Trump, a million other things that have changed, I think that strategy has to be abandoned. And we have to say, "Look, if you can get congressional support for good changes that are less controversial than an amnesty program, we should do the changes that we can reach agreement on. And accept that this kind of macro bundle is not going to happen."

Julia: Yeah. I mean, I agree with you that I don't want to condemn politicians for being savvy politicians, but I wish that they could hold something hostage that isn't so important and beneficial to the nation.

Like maybe something that they actually think wouldn't be great for their goals. They could hold that hostage and bargain with it. And cede that to the Republicans in exchange for something else.

But why use *this* as a bargaining chip?

Matt: Right. Well, one of the weird things about Congress is there tends to be an insistence that logrolling has to be internal to a specific issue area.

So you can make immigration related concessions to the Republicans in exchange for immigration gains. But you can't ever make tax concessions to the Republicans in exchange for anything else.

Julia: Is that official? Or is it just sort of an understood rule?

Matt: Yeah, it's like an informal norm. And it doesn't make sense because you ask any Democrat, "So what do you think of Republicans?" They'll be like, "Those guys are crazy. All they care about is tax cuts for the rich." But then it's like... well, okay. If that's all they care about then logrolls should focus around the thing that they care about, right?

But people are very resistant to that. And it's like, I mean, they can give you sort of explanations, but they're pseudo-explanations, right?

In the old structure when Congress was less leadership driven, compromises would be worked out in committees. And the committees actually do have specific areas of jurisdiction. So you couldn't make a tax change in a bill that was being worked out in the help committee because that was actually against the rules.

But nothing stops Nancy Pelosi and Mitch McConnell from bargaining across different dimensions of the issue space. It's just a sort of unfamiliar tactic.

But I think if we want to ever have bipartisan bills on big subjects I think ultimately that's what it's going to have to be. We're going to have to exploit the fact that it's not just that the different parties have different beliefs, because of course they do. But they also have different priorities. And so you can trade things that Republicans care about a lot for things that Democrats care about a lot.

Julia: I'm curious about... we've been talking immigration so far, but the other prong of your One Billion Americans plan is pro-natalist policies, policies to incentivize Americans to have more babies. And you alluded to how surprised you were at the pushback against pronatalism due to climate change reasons.

And I suspect that for a lot of your readers, the biggest objection to your argument in One Billion Americans probably was about climate change. That if the population of the U.S. grows -- either through increased birth rate, or through transferring people from poor countries to the U.S., where their emissions will be higher -- the total carbon emissions in the world will be going up.

Could you talk a little bit about why that's not a deal breaker for you?

Matt: Yeah. This is interesting because I had always been somebody who felt that, and I still feel that, the United States government should be doing more to address climate change than it currently is. So my orientation was, I was very concerned about climate denialist arguments, people understating the problem, etc.

I didn't really pay attention to people overstating the problem, because I didn't think we were going to overshoot on policy. So I would sometimes hear people say something and be like, "Well, that doesn't really sound true, but also, kind of who cares?"

Then I waded into it myself. If your read of the IPCC saying that we need to limit climate change to less than two degrees centigrade in order to avoid irreparable harm... If your understanding of that is that it means an

apocalyptic collapse of human civilization, then population growth in the United States, looks really, really bad. Like really bad.

It's just, that's not what that report says. When they say “irreparable harm” they're saying that certain small island nations might become unviable. Which is really bad for them. I would not want to live in a low lying island nation. But in terms of humanity scale impacts, it's just not that big.

Julia: That's not big enough to outweigh the benefits to the people who moved to the U.S., is what you're saying?

Matt: Yeah. Or just the existence of human beings. There's no case for like a Thanos-style finger snap that eliminates half the population, just because that would reduce carbon emissions.

And it seems absurd to be like, "Well, we're talking about maybe tens of millions of deaths. That's not that bad." Because it's in fact quite bad. And it would be really good to arrest climate change.

But the claim being made by the most alarmist people is so strong. Actual human extinction is a really high bar. Almost nothing that bad ever happens. I have to assume that the audience for this podcast is aware that the people who seriously analyze existential risk don't see climate change in those terms, either evaluated solely as, is this an existential risk to humanity? Or, if we're trying to rank order what are the biggest existential risks out there? Climate is not like that.

So immigration is very beneficial. I think the existence of human babies is beneficial. If we think that those things will push us closer to genuine extinction level events, we should be worried about that. But climate change is not like that.

This was the concern that the editors and stuff I was working with had. So I try to be reassuring rather than dismissive... although in this forum, I'm more dismissive. People have bad information about climate change.

Julia: This is interesting, because reading your book, what I expected you to say was that we should be pursuing technological solutions to make it so that people can live in the U.S., and live high quality lives without having really high emissions.

And so I expected the crux of disagreement to be -- between you and the people who are more worried about climate change -- should we wait until we have the technological solutions before trying to increase our population?

But it sounds like from what I'm hearing now, your view is more: Even if we never get technological solutions -- like better nuclear power and things like that -- even if we never get those, and so the emissions are increased with this population boom, it's still worth it. Because the welfare benefits are really high, and the impact on climate change risk is not as bad as many people fear it will be. Is that accurate?

Matt: Well, if I were to write a book about climate change, I would say a lot about technological solutions and what we can do on that regard. But the technology for low carbon energy is improving over time. And I do think, as we were saying before in terms of the benefits of immigration, that ultimately pro-growth, pro-immigration policies help create the kinds of innovations that we need.

I went way out of my way to convince David Wallace-Wells to blurb my book. He is the author of *The Uninhabitable Earth*, which sold a lot of copies. You know, I want everybody to be reassured. So I got that base covered, I got Paul Romer. I'm trying to cover all the bases here in terms of sustainable growth, people don't read that stuff though.

But I mean, this was a cognitive lapse on my part. I was thinking so heavily on the narrow congressional politics of climate. And I was thinking like, "There's no way Congress is going to overshoot on clean energy or fossil fuel taxes or anything like that. So, what do I care?"

But it turns out that people having bad information seeps into other eddies of politics in unexpected ways.

The other thing is I live in DC, so I'm always very informed about what elite-level political actors think. And environmentalists, once upon a time, were big into immigration restriction. But all the green groups have dropped that – like, Sierra Club, Environmental Defense, Greenpeace, none of them are immigration restrictionists.

Julia: Is that because of a change in their views or because of just political alliances with Democrats?

Matt: I believe the change in their views precedes the political realignment among Democrats. I think, if you look at it, I'd be interested. I should probably go back and look at it in more detail. And they're definitely not like opponents of social welfare type stuff.

You know, it was a big schism in the green group. And a lot of the originators of the big anti-immigration institutions in the U.S. had roots in environmentalism in the 70s, in population bomb stuff, that kind of thing.

So I was very focused on that. And my view was like, "Well, environmentalists are over this, 'population growth is bad' thing." Which is true of the big official groups in Washington. I mean I'm sure they have their tactical coalitional reasons, but you can also just speak to them. You could tell if people secretly wish they could get rid of immigrants, when it comes up, and they don't. And so I kind of took that to be, okay, this has changed.

And one thing you learn when you just get to talk to more people out of town, is that at a grassroots level, a lot of crunchy people... Again, this is why I see it as mostly a West Coast kind of thing are adhering to anti-natalist, anti-immigrant views on... they say “climate.”

But what they really are is they're nature lovers who've assimilated climate change into that worldview. But that is the sort of social and cultural origins of the environmental movement. They’re people who... You want to go live in a cabin somewhere and do composting and drive your Subaru to the mountains and walk around.

And you don't really care that the Subaru actually burns a lot of fossil fuels. The important thing is that there not be too many people on the road, so it doesn't get that smoggy and you can see a nice view.

Julia: Right, those are not fully aligned goals.

Matt: Right. Well, that's just not really what climate is about. And so this is what I do talk about in the book -- that if you want to have solar panels... There's the nuclear piece of this, where I think people are familiar with the tension between climate goals and traditional environmentalism.

But utility scale solar plants consume incredible amounts of open land. That exact same tension just recurs throughout the climate conversation. Are we going to build transmission lines? Are we going to build renewables? Are we going to build nuclear? Are we going to have carbon capture? Are we going to replace my old-ass row house with a modern, more energy-efficient house?

There's this battle between a sort of green, NIMBY worldview and a techno-modernist climate-centric worldview. And I think it's internal divisions on the left – but like, internal to individual human beings, where they have unreconciled differences of opinion with themselves about this.

Julia: Well, an important thread running through your book that we haven't talked about yet is what the impact of a large population boom, would be on our housing stock and our transportation systems.

And so I want to segue into talking about another topic I've been dying to pick your brain about, which is YIMBY.

So for our listeners, that's a movement devoted to building... well, especially more housing, especially in expensive cities like New York and San Francisco. YIMBY is named as a retort to what are called NIMBYs, an acronym standing for 'Not in my backyard', i.e. people who oppose building stuff in their neighborhood. And so YIMBY is a retort to that, and it stands for 'Yes, in my backyard'.

And Matt, one of your earlier books is basically a YIMBY manifesto. It's called, *The Rent Is Too Damn High*. And in *One Billion Americans*, you revisit some of those arguments, because obviously building more housing is relevant when you're talking about a huge population growth plan. So could you summarize the case for building more housing?

Matt: Yes. The case for building more housing is that it's good for people to have places that they can live.

Julia: Slightly longer summary!

Matt: I think the big thing here is that, to an extent that is increasingly appreciated, but I think under-appreciated, that the United States starting in the 70s and really continuing throughout the concluding decades of the 20th century, drastically raised the barrier to constructing new houses anywhere other than pure greenfield, where you consume open land and build new tract houses.

And then in the kind of coastal areas, we went further and also started to curb that greenfield development, in that case I think for somewhat valid reasons. But the upshot of it is that you can't infill with apartment buildings almost anywhere. And you can't sprawl that much, on the East coast, at least. I think in the West Coast too, actually more so in some West Coast cities.

And as a result housing has gotten very, very expensive. And this has come to have a lot of cascading downstream impacts on American politics and society.

And we're in a weird situation where, if you go to Aspen, and you ask people there like, "Oh, is it really bad that this is all just like rich people with vacation houses?" I think they would say, "No, that's fine. That's, that's desired outcome here in Aspen."

But if you go to San Francisco, if you go to New York, if you go to Arlington County in Virginia, people will say that this is not the outcome that they want. That affordable housing is important to them, it's an important

issue. But they are not doing the things that would address this. In part because...

You know, I feel weird about the YIMBY concept, just as a name.

Julia: How come? Is it because it's not actually their backyard?

Matt: Yeah, I think it misconstrues the issue. And it's weird, because I am so aligned with all of the legislative initiatives that groups that have adopted that label are behind.

But I do think it's important to clarify that the whole point of the YIMBY reform movement is actually not that everybody should show up at the community meeting where NIMBYs shout about how development is evil, and shout back at the NIMBYs and say, "No, it's good. Yes, build in my backyard."

The point is to change the decision-making process so that high level entities like city governments -- or even in California, state governments -- are making decisions about land use. So California YIMBY's big idea is that the California state legislature should say, "You have to allow more housing in places that meet criteria A, B, C and D."

And that's a great idea, but it's actually not about saying, "Yes, in my backyard." It's about saying, "Housing growth is a desirable outcome for the state of California." And I think that's amazing, and I 100% subscribe that agenda and I'm proud, I think, to have helped inspire and shape it.

But I do think that the name is a little misleading. I do, as a matter of conscience, I email my local board guy every time there's a development controversy in my back yard, to be like, "No, you've got to let them build it." But that's not a scalable solution. And it's not actually what the proposal is.

Julia: Yeah. Although, it is a pretty catchy acronym, so I can't really blame them for going with that, even if it wasn't 100% accurate.

Matt: I've always been a fussy pedant, even before I was an aspiring rationalist, which is not always the best way to make slogans.

Julia: Well, there is a big ongoing, evergreen debate among rationalists about: Should we adopt a different label because we don't actually think we're all rational? So maybe we should say, "Aspiring rationalist." Or “aspiring rationalist-adjacent..." And then people will tack on more and more qualifiers until it's not a thing that anyone will actually ever say in conversation anymore, and so we're back to square one.

So, it seems to me that there are three different justifications for the YIMBY case, for building more housing in expensive cities. And I'm going to list the three, and then I'm curious, first if you think that's a good breakdown, and also if one of those three justifications is more central to you than the others.

So I'd say the three reasons for being a YIMBY are, one, building more housing will lower housing prices, or lower rents. Two, building more housing will boost productivity because it allows more high skilled people to cluster in the same places. And three, building more housing will just let more people live where they want to live, which in itself is a good thing.

I'll call them affordability, productivity, and choice, I guess. So do you agree that those are the three main reasons behind the call to build more housing? And is one of those more central to you than the others?

Matt: Yes. I mean, I think those are the sort of three pillars.

To me, the productivity case is the most important. I think the affordability case has come to be very prominent, I think in sort of practical activist circles. There's been a kind of left YIMBY synthesis that has made some clout, and so it naturally emphasizes affordability.

There has been some... people don't pay as much attention in the media to things that happen in state legislatures in red states. But there has been some right YIMBY progress made in several of those states, where as you would expect, the sort of “choice” synthesis comes in more.

To me, I'm like a productivity person on this regard, and I want to make whatever partnerships I can with whomever. I used to play in a poker game with a lot of libertarians, so I was used to the choice framing. But then it sort of came back around more in the affordability lens.

I do think it's important not to over-index on the affordability point. Because it tends to end in these kind of rabbit holes of people debating public housing in Vienna in the 1920s, which is like... real socialists want to say, "Okay, there was this incredibly successful public housing program in the red Vienna era, and that's really what we should do."

And I think there's a lot of problems with that analysis, but the big thing is that, yes, if your only concern is the affordability of housing, there are other ways to get it. What is most important about letting more housing be built in dense areas is its sort of really big picture economic impact.

But of course, you want to answer the question, “Well, is this going to leave existing people worse off?” Because that would be a good reason maybe not to do it, or to oppose it politically. And I think the evidence that it

would make them better off is quite strong, and that's an important part of the conversation, but it's not the-

Julia: You're talking about low income people in neighborhoods where YIMBYs want to build new market rate housing, and...

Matt: I wouldn't say neighborhoods exactly, but cities. Working class people, renters, living in expensive metro areas. They worry a lot about their personal housing situation. And they want to know what the impact of changes to housing policy will be on them.

And I think the evidence is very strong that with loose housing supply, you can have gentrification without displacement, and people end up better off than they ... Not just better off than they are now, but better off than they *would be* in this kind of lefty, "they think it's going to be a utopia, but it's actually going to be probably bad," where we have big concentrated public housing developments.

It's actually better to build some big new towers, let some more affluent people come in, not have you be displaced by rising rents, but have a more diverse economic and political infrastructure in your city and your community. So you see, for example, less residential segregation in the big Texas metro areas than you do in the more liberal ones. And it's because the housing mix is just more diverse and more scattershot, hither and yon.

And you could... like in Singapore, they both have the government build apartments for most people, and they also have an ethnic quota system for the apartment blocks. So it's not that you can't create different things with a statist approach, but I just think realistically, that is not what we're going to do. Even if you get the political support together to build more public housing, it's not going to be located in the rich neighborhoods or implemented in an integrationist way.

Whereas a more choice-based solution actually gets you closer to those kind of social justice values.

Julia: Yeah. Did you read Nathan Robinson's critique of YIMBYs in Current affairs recently?

Matt: I did.

Julia: His argument was basically that YIMBYs pay lip service to low income housing concerns, but in practice, they don't really focus on it. They only push for market rate housing and act like the market will take care of poor people somehow.

What did you think of his argument?

Matt: It's really bad. It's a very bad argument.

Julia: Matt, what do you really think??

Matt: This is like... Nathan, he's an entertaining writer, and obviously a smart guy. But he operates in such a straw-manning kind of dynamic. He literally just doesn't ask himself, "What is London Breed's record on subsidized housing for people? What do the handful of YIMBY members of the House of Representatives do on section eight grants? What is my actual position on this?"

And he doesn't look at the empirical literature. Market rate housing alone is not a sufficient answer to the problems of low income people in high rent cities. But market rate housing alone does in fact improve their situation. Even if you didn't do anything else, that is still better.

And that's an important reality. It's a tough L for socialists to take, that a market solution alone would improve the situation.

It's of course true that some people are poor. Food is pretty cheap in America; nonetheless, there are people who are too poor to get by without SNAP benefits. We need to do things to support low income people. And that's true on housing. It's true on healthcare. It's true everywhere. And it's fundamentally an incomes problem.

But what I would say to leftists about this is that the problem is that it's shitty to be poor. Right? And what you want is really big solutions to make people not be poor, not to hammer in on super specific areas and say, "Well, the free market's not going to help the poor here."

A free market in, I don't know what... an iPhone 12X is not affordable to low income people. But that's not because there's anything wrong with a free market for cell phones. It's just, being poor is shitty. And that's why it's important to lift people's incomes.

I don't know. I don't have that much else to say about it... Other than that I wish he would engage with what people... Because so much of it is, it's this character-based attack, right?

So to flip that around, I see a lot of people who want to say that they are advocates for public housing, who don't do any of the legwork of looking at: Why is it challenging to get public housing built in the United States? And it's the exact same regulatory apparatus that makes it hard to build market rate housing, makes it hard to build public housing, makes it hard to build solar panels. It's not domain specific. It's a procedural requirement. And they're bad, they're bad requirements.

Julia: I tend to get really frustrated when it seems like people are ignoring the evidence and just making character-based arguments.

But I've been steel-manning it recently, and I think that if you don't feel like you can really trust the very complicated, empirical, technical arguments for the other side's position -- and I think many people, including to some extent myself, feel like I can't quite trust the argument...

I can't evaluate the economic literature for myself in a way that I'm totally comfortable with. I can read the paper and see if it seems sound, but maybe there's a good rebuttal to it, or maybe they left some important things out that I didn't notice. Who knows? And I think for most people, the problem's even worse than it is for me.

And so if you don't feel like you can really evaluate those arguments for yourself, then maybe it kind of makes sense to fall back on: “Well, what are the motives of that side? You know, those are economists, of course they're going to support free market stuff. And the YIMBYs are allied with them.”

And so maybe it kind of makes sense to not be all that responsive to the empirical evidence if that's the epistemological state you're in. Does that make sense?

Matt: Yeah, I mean, but that is why I do think it's important to be, at least, rigorous in your character assessments. You know?

Julia: Yes. I agree, I agree!

Matt: If you're going to rely on character... So, there's people arguing about the minimum wage, which is a broadly similar kind of dispute. I am really struck by the number of people -- right of center economists -- who I read every day, and they never, ever, ever, ever advocate for wage subsidies for low income people. And then suddenly, the minimum wage pops up on their radar, and they say, "Oh, this regulation is terrible. What we really ought to have is wage subsidies for low income people."

And, you know, it raises my eyebrows. Right? I recognize that's not a logically valid argument against their read of the empirical evidence, but it makes you wonder. Right?

When you see that low income workers themselves favor a minimum wage increase; that the people who you see doing the work, day in and day out, to bolster low-income people's living standards in other dimensions favor a minimum wage increase; and the people saying, "No, it's bad, and we should do subsidies instead," never seem to actually care about this... It undercuts them a little.

And I think we're going to talk about Iraq at some point. Right?

Julia: Yes, definitely.

Matt: So to me, Iraq was the ... I remember, I was a college student, and this is similar to what you tweeted, but I remember sitting around being like, "I am hearing from all these people, like really dumb ad hominems like 'Bush sucks, so the Iraq war sucks.'"

And I'm sitting here with my Ken Pollack book.

Julia: *The Threatening Storm*. Yes.

Matt: And I'm like, "Man, I've got really good argument and evidence on my side. And you hysterics are out here talking about how Dick Cheney's a liar. I'm like, who fucking cares?"

And in retrospect, obviously that did not work out so well. And a sort of broad heuristic that these are bad people who were ... And to be clear, I never thought that George W. Bush was a good president. I never thought that Dick Cheney was a moral person. And I never thought that the presentation of the evidence that Bush and Rice and Rumsfeld and all those people were making was honest.

I had all the building blocks of "These are bad people, they are liars. What they're putting on the table is going to be a catastrophe."

But I pushed back. I was like, "No, man. I'm way smarter than you. It's fine. They need to dupe the sheep-like people into seeing this as closely connected to 9/11, because that's just the smart politics. But really, it's a good idea for these other Ken Pollack reasons."

And it was a horrible mistake, you know?

Julia: Interesting. Do you want to talk about Iraq now? I have a few more YIMBY questions, but I could leave them be, since we're ...

Matt: I don't know, I talk about housing all the time and I never talk about Iraq, so I'm into Iraq.

Julia: OK, yeah. So, for our listeners, I mentioned to Matt recently that I was in favor of the Iraq war at the time. I would've been, I don't know, 19 or 20. And it just recently occurred to me last week that I've never done a real postmortem on my thinking at the time.

By which I mean: Now, obviously, I think the Iraq war was a bad idea. And I'm just curious whether that should have been obvious to me beforehand. And if so, where exactly did my reasoning process go wrong?

And so I've been doing this postmortem, only 18 years late! And I wanted to talk to Matt about this because I saw you had been in favor of the war at the time, and wanted to compare notes.

So you mentioned Ken Pollack's book, *The Threatening Storm*, in which he argued that Saddam was ... Well, at least, the part that was most compelling to me, that changed my mind and made me pro invasion, was where he argued that Saddam, A, had a track record of aggression, and B, was actively pursuing nuclear weapons, and would likely be able to get nukes within a few years if he wasn't stopped.

And so I found that to be a pretty compelling argument for war. And lots of other people at the time, including lots of liberals, were similarly convinced by that book.

What do you think was wrong with his case in that book? Or, how should we have known to not be convinced by that at the time?

Matt: I think that the American national security community has some just really misguided basic premises about the importance of deep US military engagement in the Middle East. And that Pollack's book, as you would expect from somebody with his job and at that time, is just written entirely from inside that worldview.

And it's very convincing, it's a really good book. It's really well argued --

Julia: Yeah. And it also sounds very much like a liberal who is reluctantly being forced to conclude that war is necessary. As opposed to a jingo, gung-ho-for-war conservative. Which I think was a big part of its influence.

Matt: Absolutely. And I just think that ultimately, the takeaway from that is that his mistake is ... I mean, you could say some specific things he gets wrong, but everybody gets some stuff wrong when they're talking about the future. But it's two big picture premises: One, which is that it's incredibly important for the United States to be micromanaging the geopolitics of the Persian Gulf region, is wrong.

And the other is just that... I don't know how to say this other than the absolute most simplistic, naïve case against the war is correct, which is that wars are really bad. They unleash really hard to predict, incredibly destructive forces. And you just really shouldn't do them unless it's clear that there is absolutely no alternative to it.

And this is what ultimately guided me correctly, I think, in the Obama-era Libya debate. Where again, you had a lot of people... I think Anne-Marie Slaughter was probably the sort of Ken Pollack of the Libya war, in the sense of a liberal person who had sort of compelling, heart-stringing arguments.

But if you just say, “Look, the expected value of discretionary wars is really, really bad, I'm not going to engage with the incredible micro specifics of this one,” I think you get to the right conclusion on Libya, which is like... I did not say, "Oh, look, if we intervene in the Libyan civil war that's going to lead six years down the road to exactly this bad outcome." But just, like, some bad shit is going to happen.

And if what you want to do is be a humanitarian in the world... then, it's like get some fucking malaria nets, we know that that works, right?

Julia: I just wanted to clarify, sorry -- it sounds like maybe yours and my support for the *Threatening [Storm]* argument, maybe they were a little different.

My support for it was... weapons of mass destruction, like chemical weapons and biological weapons, are bad, but that alone wouldn't be worth invading another country for. It was specifically the nuclear weapons, and the argument that he was likely to get them in a few years if we did nothing, that clinched it for me.

It sounds like for you maybe it was a broader sort of... well, I won't put words in your mouth. What was the-

Matt: Yeah, I mean I was more gung ho about regime changing in general.

But here's where I don't actually want to be sure that I remember my own views a hundred percent correctly, but what was so bad about Saddam Hussein having a small nuclear arsenal?

Julia: Having nuclear weapons? I mean, again, it's been a long time but didn't he invade other countries and make threatening noises about Israel and Kuwait, and like...

Matt: No, right. But so this, to me, I think at the time I also found this pretty compelling. That it's like, well, if he has a nuclear deterrent then he might take advantage of that nuclear deterrent to invade Kuwait again, and this time we wouldn't be able to kick him out. And now I’m kind of like, well is any of that true? What has North Korea done with their nuclear deterrent?

Julia: Yeah. I mean I remember thinking at the time people did bring up the whole like, “Well if you support invading Iraq to because of his nuclear capabilities, then you should support invading North Korea as well.”

Again, it's been a long time but I remember being under the impression that there was less opportunity to actually influence the outcome in North Korea, than there was in Iraq. Is that right?

Matt: No, I mean I think it is right. But I think one of the things… when people talk about the war going wrong we mostly talk about the specific circumstances on the ground. But one of the big things that happened as a result of that is, I think it had a pro-proliferation impact on North Korea, on Iran, on Pakistan, on Syria maybe. It indicated that the United States could be deterred, as was done by the North Koreans, but could not be reasoned with. So you should get nuclear weapons, right?

Then we wound up in this Iran policy debate where I think the Obama administration, in its diplomacy with Iran, really tried to sort of un-pop the top on that, and convince the Iranians "No, no, no, no, no, no, you can enter a disarmament deal with us. It'll be fine."

Then the Trump administration came in and indicated that maybe that's actually not true, and the United States will just unilaterally abrogate deals with you if you make them. But again, if you're North Korea, if you have nuclear bombs, we will treat you as scary and stay away.

And that strikes me as… that's like the tough problem in American proliferation policy, is that we can't seem to credibly commit ourselves to deals, right? We don't want other countries to get nuclear weapons, but we also don't really want to just go invade everybody. We don't want to fight nuclear armed powers.

And so we're actually unleashing proliferation I think, with a scattershot approach, and it's troubling.

Julia: That was definitely not part of my calculus at the time. It just seemed like "Invading definitely reduces the risk of nuclear war and yes, it comes with these risks of collateral devastation," but the risk of nuclear war increasing was only on one side of the equation, in my head, at the time.

Matt: Right. The other thing I remember very specifically arguing to people, that was erroneous in retrospect, was: I thought that my friends, my anti-war friends, were being insufficiently deferential to the expertise of the policymakers.

I thought that, whatever you made of Dick Cheney and George W. Bush and Don Rumsfeld as people… that they were re-election seeking politicians, who had access to classified information, to highly expert military and intelligence planners, and that they would not be embarking on this course of action unless they had a very high degree of confidence that it would work out well and reflect well on them personally, right?

Julia: Yeah.

Matt: I also took note of the fact that Tony Blair was supporting the war, Hillary Clinton was supporting the war, Tom Daschle who was the democratic leader in the Senate at the time, Joe Biden, who was the top person on the foreign affairs committee.

I thought look, if you're not impressed by the fact that the majority of the people in a position to know things that you don't know have decided this is the right way to go, that there's something wrong with that, right?

Obviously, that was off base. It turns out that the collective political establishment can all go do something crazy. That Bush managed to get re-elected even though there were no WMDs and problems were evident there. That Tony Blair's administration, that their view of the geopolitics was not really about Iraq at all but that it was about the relationship with the United States of America, and they wanted to support the Bush administration.

I thought I was being very sophisticated, but I had actually adopted a very naive view of power and politics.

Julia: So, earlier I was talking about "Should I have known better than to support the war? Where did my reasoning process go wrong?"

But I do want to make a distinction between: "I used a reasoning process that I should change, I should update for the future," versus, "I had all the information I needed at the time to know that I was using an imperfect reasoning process."

And so it seems – again, maybe I'm still being naive, but -- it seems to me that the inference you made about all of these establishment figures who have skin in the game seeming to agree on the course of action... That seems like, given the information you had at the time available to you, that seems like a reasonable inference.

And now you know it was wrong, and so you should update going forward -- but I'm not sure if I would say you made a *mistake*. What do you think?

Matt: I mean, it's hard to know. That's interesting. That's maybe a deeper distinction than I had really thought about.

I do think that, given my current attitudes, I think that I should have taken a less bullish view on the Clinton-era military interventions in the Balkans. That my read of post-Cold War history, as of the day after September 11th, 2001, was that the hawks had been right about Bosnia and Kosovo, that it was a huge shame that we had not intervened in Rwanda.

I was not a dogmatic humanitarian interventionist, as I guess we called it at the time. But I thought that that school of thought sort of had the facts and the history on their side, and that influenced my thinking.

I think that it was in fact knowable at the time that that was not correct. I think looking back, I think the contemporaneous criticisms of humanitarian militarism were perfectly correct and persuasive at the time, and that there was a kind of real error in judgment that a lot of elite actors participated in and that I sort of got swept along with.

You know, in defense of myself I'll say, "You know, I was 21. I was a junior in college. If Joe Biden and Hillary Clinton and Tom Daschle can make these errors in judgment so can I." At the same time, I think excessive deference to political consensus is not a great habit of mind in the world.

But the American public as a whole has I think updated since Iraq to be more distrustful of our political leaders, and I don't know that that could have ever happened without the actual demonstration that they are less trustworthy than they had seemed. The nineties went really well in America, right? So you would come out of that experience -- you know, the collapse of the Soviet Union, dot com boom, full employment, rising wages, then out of nowhere these crazy guys murder thousands of people -- with a high level of trust in the political system.

I think I understand why that's where I was, and that's where most people were at the time.

Julia: Yeah. One thing that I realized in doing my post-mortem, and I'm curious if it resonates with you, is that I didn't really have a good sense at the time of what would actually be strong evidence of, for example, a nuclear program.

The question I wish I'd asked myself is, "If a country were secretly pursuing a nuclear program, what would that look like from the outside? Would it be pretty obvious? Or would it be easy for them to hide it, and so it would be not that unlikely that we would only have indirect evidence of such a program?"

And because I didn't have a sense of what we should expect it to look like, if it were in fact true, I didn't have a good way of evaluating the strength of the evidence that people like Ken Pollack presented, to support his claim that Saddam had a nuclear program.

Like for example, the fact that Saddam was reluctant to allow inspections. Is that good evidence, or really weak evidence of a nuclear program? I don't know. So I basically just defaulted to assuming "Well, experts like

Pollack seem to think this is strong evidence of a nuclear program, so I guess it is."

So, I wish I'd been more Bayesian, I guess.

Matt: Well, and on process... I mean, I at least at the time was not well-versed in, "How do I seek out the best arguments against? Where do I find people who are knowledgeable about nuclear weapons?"

Julia: Yeah. As opposed to the people around you in college who are making dumb arguments against war.

Matt: Right, and what happens is that if you pit 12 random people from Kirkland House against some Brookings Institute fellows, on any policy issue, the Brookings people are like, they're just better informed. That is true. And it turns out that being well-informed about a topic has a relationship to reaching the correct judgment about it -- but it's a loose relationship, right?

Unless you are actually pursuing the most informed people on both sides of an issue, you really sort of load the dice. And it was precisely because I knew so many people who are anti-war, "I was like, all right I got it, I know what the anti-war crowd is saying."

Julia: Exactly, me too.

Matt: "I'm going to seek out these strong arguments for the pro-war side." And strong arguments are better than arguments made by randos, but that's really neither here nor there, right? The internet, social media, all these things that we have now have both taught me that you can find incredibly bad arguments in favor of any position. No matter how correct the position is, there's somebody arguing for it in an incredibly stupid way.

I also understand better, like, how do I find the person who thinks that capital gains tax cuts are a really good idea, and read it? I was not habituated to doing that, or knowledgeable about even how you would go about doing it.

I mean it's so basic. But if you want to be genuinely open-minded about something, you need to make sure that you are actually listening to the evidence on both sides, not just kind of tuning one group of people out because you find them annoying. There's just lots of annoying people and it's not good to let them overly color your views.

Julia: Right. Yeah, I agree. I don't know if I made this clear before, but I was a sophomore at Columbia and surrounded by what I felt, with irritation,

were dumb arguments against the war. There were people I remember outside my dorm one day protesting for North Korea's right to have nukes.

Matt: Uh-huh. Yeah, the Spartacist League, right?

Julia: Oh, I don't remember. Maybe.

Matt: We had them too. I was obsessed with these jackasses, with their pro-North Korea signs.

Julia: Me too!

Matt: And in retrospect, it's like: Why was that important? It felt important, but it had nothing to do with anything.

Julia: This was something that Noah Smith and I were talking about in that thread that sparked this whole post-mortem. That, in retrospect, it's clear that the bad arguments of annoying anti-war college students played a significant role in my eventual support for the war.

And I was kind of telling myself that that was a reasonable Bayesian update. That if the best arguments you hear against something are terrible, then it's maybe somewhat reasonable to think "Well, maybe this thing is actually a good idea, if the arguments against it are terrible."

And there was maybe some of that going on. But it was also, I think, an identity-based thing. Where I just really found these people annoying, and enjoyed distinguishing myself from them by supporting the thing that they opposed.

It's hard to avoid that conclusion, when I look at it now.

Matt: Absolutely. I feel a hundred percent the same way. Also, I think the heuristic that the prominence of bad arguments should undermine your strength of support for something makes sense, but I wasn't applying it correctly.

Julia: How so?

Matt: Well, so one reason that so many of us enjoyed Pollack's book so much is that the argument he offered was different from the argument the Bush administration was making.

Julia: Right, yeah, "I'm not someone who listens to the Bush administration arguments. Those people are dupes and losers."

Matt: Right. So the fact that the president of the United States was engaging in all of this hand waving about 9-11 -- which according to Pollack was irrelevant -- that should have *drastically* undermined my level of confidence in what they were saying, right?

I mean, the fact that the people who supposedly had the spy satellites and all this other stuff were being so shady about what they were actually saying and what was actually going on should've raised, I would say, at least as much if not more suspicion than the fact that other people on my dorm LISTSERV were making arguments that I didn't think were strong, right?

It is absolutely true, I think, that assessing whether people are making bad arguments has a legitimate role in your decision making calculus. But if the people actually in charge of the process are making bad arguments, that should I think give you some cause to doubt the overall wisdom of what's going on.

But it's very flattering to be like, "Oh, I'm smarter than these dumb-ass college students" and I'm also part of this secret cool clique who understands what the president is really doing here. It felt like you were in possession of secret knowledge, right? Which is very, very flattering, but not great.

Julia: There was a thread on Reddit the other day from someone who had been a QAnon believer, or follower, and then kind of like deconverted. And the quote that I remember was he said, "this stuff feels like critical thinking from the inside, it feels like you're being really epistemically responsible and skeptical and virtuous by questioning the common wisdom."

And that is kind of what it felt like... I mean, not to compare supporters of the Iraq war to QAnon believers, but you know, it's on a spectrum.

I did listen to arguments against my views, but there was always an argument against that argument. And then I kind of was like, "Welp, I'm done. I found a rebuttal to that argument, and I've been a critical thinker."

I remember people pointing out, "Well the UN inspectors didn't find anything. Isn't that evidence that Saddam doesn't have WMDs?"

And I think Pollack's response to that was always like, "Well, but there's this 'inspections trap,' where Saddam will always comply just enough to reassure us, but he'll never actually let the inspectors have free rein enough to find the WMDs."

And I found that convincing at the time. It's like, "All right, great. I've swiftly dispatched that anti-war argument." But I didn't go a step further

to say “Well, but if that's the criterion we're using, then isn't it kind of impossible to find evidence that we shouldn't go to war?”

Matt: Yeah, I mean I actually think that the Iraq war as “centrist QAnon” is not a terrible analogy. Because the way that “inspections trap” argument worked, right, was both-

Julia: You remember it?

Matt: Yeah, it was both classic conspiracy theory stuff, where like the fact that the inspectors can't find the WMD just goes to show how good Saddam is at concealing them...

Julia: Yeah! Oof.

Matt: But also the reason it was a “trap,” right -- because he obviously couldn't advance the nuclear program while the intensive inspections were going on, right? Even though it was supposedly hidden?

So it would block the advance of the program. But it was a trap because the extent of the inspections process was going to sap our political will, and we would eventually walk away from the inspections regime. And then Saddam would be able to go back to his building.

So we had to avoid that trap, right? We had to go for war and not settle for the inspections as a concession.

It's such a multi-layered thing, of like, we need to trick our own public into believing that there's no alternative to war, because even though there is an alternative to war -- AKA intrusive inspections -- we can't trust the public to keep up the will to conduct those intrusive inspections. So because Saddam is tricking us, we need to trick the voters...

It's very convoluted, when you actually get into it. Versus, like, can't inspections handle this? And the answer is yes. Why are the inspections a trap? It's like a real spun out kind of thing there, right?

It's not the same as “The Q clearance guy is going to execute the whole cabal,” but it has some of that same stuff. It's like, well you're an insider. The people who can see the intelligence know. You were talking about this too -- it was like, what the fuck did I know about nuclear weapons programs, right? But well, these guys, the experts, they say this blurry photograph is strong evidence... and there was the thing about the aluminum tubes, right? So it seemed cool.

And I think there was a lot of that kind of stuff going around at the time. I remember being in a class on *Globalization and its Discontents* in college,

and Tom Friedman was a guest professor along with some cranky old lefty academics and-

Julia: You're really taking me back.

Matt: No, but it was the spirit of the times. There was so much there about how, “Well the real reason we need this free trade agreement is like, blah blah blah, ‘Golden Arches theory of peace,’” something like that, right?

And I'm not a super populist person who's like, "Well, the public can never be wrong." But I do think the argument that in politics we need this fake argument, but then there's really some secret, totally incompatible other argument that's the reason it's a good thing to do... I don't think that works, as a policymaking paradigm. It's such an open invitation to special interests, and just like scammers, to hop on your policy bandwagon, when you say "No, the politician shouldn't articulate what they're doing in a transparent way".

There's more to life than trusting the wisdom of the people. But politicians just lying all over the place is not good.

Julia: A bold claim!

Matt: It's way out there, but I promise in 2002 this would have been a striking claim.

Julia: Do you feel like you now have, kind of, better taste for arguments? Where you can kind of get a sense that like “This argument is starting to feel overstretched,” or it's starting to feel too convoluted, or something, and that causes you to kind of take a step back and reevaluate?

Matt: I mean, I hope so. It's hard to know, right? I mean, I have become a person who is a little more infused with self doubt about things.

Mostly though, my biggest takeaway from Iraq was not a metacognitive point about assessing arguments, but was actually about the credibility of the American foreign policy community, and the wisdom of their overarching conceptual frameworks. I am constantly blown away, like anew, on a weekly basis, by how little the discourse around Iran seems to have incorporated-

Julia: Incorporated the lessons?

Matt: The just giant fuck-up of Iraq, right? Nobody there has really reassessed anything, other than the specific technical implementation of an extended occupation of a Middle Eastern country. When I just think the takeaways

about WMDs, and hegemony, and the significance of the region are just all so much bigger than that.

Julia: Is that update you're talking about, with respect to the foreign policy establishment -- are you talking about intelligence analysts at the CIA and everything? Or are you talking about the high ranking, Colin Powells of the world?

Matt: I'm talking about the people who cycle between political appointments and think tanks. I don't want to be too harsh on think tank people because some of my best friends cycle between think tanks and political administrations, but it's really wrong to think of those people as neutral experts in some sense.

They're part of a political process. And if you have confidence in a whole thing – like, I think the people who do higher education policy for the Democratic party in fact are pretty smart and well-intentioned, and are trying to make things better, even as they, their expertise melds with electoral politics.

But the people on the national security side... I really don't know, man. I like them better than the ones on the Republican side. But I don't like either of them very much. And it's not the same as talking to a scholar of Iraq somewhere who just has some takes about Saddam.

If the politicians feel that they have to vote for the war to preserve the viability of their future presidential campaigns, the experts at the think tanks are going to tailor their analysis to support the elected officials, and not vice versa. That I know now. And I think it should have been knowable when I was in college, but I did not understand it.

Julia: Well, not to bring it back to metacognitive updates, but I was wondering whether there's an update in here about trusting expertise.

Because with the mistakes that public health communicators have made -- in communicating whether masks work, and how big of a deal COVID was going to be -- there've been a series of debates this year about whether people should just “trust experts,” on a topic that they aren't an expert in. And a lot of people have pointed out that the failure of the public health establishment kind of undercuts that “trust the experts” policy.

So do you think there's a similar thing that should be said about the Iraq war? Where the, not politicians, but the “experts” in the intelligence community really fucked up, so should that update us away from “Trust experts in general”?

Or is it kind of an exception, for some reason?

Matt: It's hard for me to know what the alternative to trusting experts is exactly --

Julia: I mean, it's like having a higher prior on... If you're pretty confident that war is really bad, and should be avoided unless absolutely necessary, then... If you have lower trust in the intelligence community, it should mean you should need a really, really compelling case, with strong evidence, before you go with their recommendation.

Matt: Yeah, I think in both foreign policy and public health that... particularly thinking after the pandemic, which has shook me in a variety of ways, is: I feel like I need to be raising the bar for what is the actual subject matter, that the subject matter expert is an expert in?

A lot of what we get is adjacent expertise. So somebody who studies viruses, and maybe knows a lot about the protein structure of viruses, will opine about masks, right? And you've got to ask yourself, "*Do* they have subject matter expertise in this mask thing? Whose expertise do we need here?"

Because one thing that I think clearly came out of the whole masks controversy is that public health experts underrated how easy it would be to get cloth masks in everybody's hands. It didn't occur to them as a solution to the PPE shortages that we could just get everybody a cloth mask.

And that's because they're not experts in textile manufacturing. And it's no shame on them for not being experts in textile manufacturing. But they were thinking about, "Will masks give people a false sense of security?" Which is a psychology question. They were thinking about "Can we substitute away from surgical masks?" Which is a textile supply chain question. They were thinking about "Well, what are the antiviral properties of cloth masks?" Which again is a textile question. That's not a public health -- it's obviously relevant to public health, but it's a material science question.

They didn't have expertise in those areas, and were in fact just on a par with me, or anybody else, right? But they had the, sometimes, arrogance that comes with believing you're being asked about your area of expertise.

And so I'm really trying... it's like, if somebody has published research on the immune response of vaccines, I don't think it's a great idea for me to question them on that, like what do I know? I can read, I can try to do work, but I don't know. They are experts.

But what are you an expert in? Because there is so much social psychology, individual psychology, economics, right? This COVID pandemic is such a

big problem, that I don't think anybody has actually done deep scholarly work in all the relevant areas. So it's like the hour of the foxes, right? Rather than the hedgehogs. Because it's such an interdisciplinary problem.

Julia: Right. Yeah. Probably one of the worst offenders, in my opinion, was the debate over vaccine distribution, and who should get a vaccine first.

Matt: Oh my god...

Julia: You know where I'm going with this!

And there were a number of bioethicists -- or just bioethicist fanboys, I guess -- who got really angry at anyone questioning the draft recommendations for vaccine distribution from the CDC, and said, "Stay in your lane, you're not an expert."

We're not even talking here about, like, virus transmissibility. We're just talking about, What is a fair and reasonable way to prioritize different people over each other?

And it's horrifying to me that we can have some people who think they're the only ones qualified to have opinions about that.

Matt: I would like to know more, this is on my to-do list...

Julia: What do you mean?

Matt: Like, what is the field of bioethics? I don't understand how that's a purported domain of expertise. Because I've clashed with bioethics Twitter, on both this vaccine distribution thing and on human challenge trials for vaccines.

And honestly I say this as a... I was a philosophy major in college. The number of people who have tenure track jobs doing normative ethics in philosophy departments is tiny, because the world does not... It's an interesting subject matter, but it's not... The world needs a lot of engineers. The world doesn't need a lot of "Experts in normative ethics." Because people have their own opinions.

And, I don't know, the ethics experts just disagree about the big picture, obvious controversies. The trolley problem, et cetera. I was blown away, on the human challenge trials, that Christine Korsgaard, my former professor -- I think the leading Kantian deontological thinker -- she had her name on the 1Day Sooner challenge trials thing. And then there's these, I don't know who, being like, "Well, that's not good ethics."

And I'm like, "Well, according to whom?" Right? Obviously in consequentialist terms, it's good ethics. I happened to know the top expert in Kantian ethics, she thinks that's a good idea. So, who the fuck are you?

Julia: Even by their own standards of who is allowed to have opinions, they should be taking that seriously.

Matt: Right. But then I feel weird about it. It's like, okay, she's not a high priest of Kantianism. People are allowed to disagree with her. But then it's like, "What is this subject area?"

Whereas if somebody wants to tell me they have expertise about spike proteins? You absolutely do. I know, I guess, what a spike protein is, because we've talked about this enough on Twitter. But I've never used an electron microscope, I don't think I could correctly define a virus.

There's a lot of stuff that experts know that's relevant to this pandemic, but then like... "I'm an expert in right and wrong"? That doesn't sound like a real thing to me.

Julia: Yeah, I agree.

Matt, I want to make sure we loop back to the YIMBY topic before I let you go.

I was wondering if you think that there is a principled case against YIMBY or his opposition to YIMBY arguments, basically just the result of some combination of ignorance about economics and, or selfishness.

Matt: I think selfishness is a big factor, although not an illegitimate issue in politics. I don't think YIMBY works if, at the end of the day, it's really bad for everyone, but just beneficial in some other way.

So I think it's in good faith if people think their neighborhood changing will be bad for them personally. I don't see that as necessarily an illegitimate move to make.

I think that there is a left NIMBY view that I wouldn't characterize as rooted in ignorance of economics, exactly -- I think that's that's mean spirited -- but it's rooted in a kind of utopianism. In a desire to not evaluate the specifics of some proposed change to the zoning code, but a desire to uphold a basically hypothetical central planning of urban land, that will be way better than the actual one that we have.

And I don't think that that style of doing politics is very good, but I don't quite know how I would prove that it isn't good.

I think it's bad. I think that assessing things in terms of “How does this correspond with some other ideal scheme?” versus “What's the impact in the here and now?” is mistaken.

Julia: All right. Let me throw another argument at you that I've heard a few people make. This one is specifically about the “Building more housing is good because it boosts productivity, due to clustering effects” argument:

Do you worry at all about a lack of robustness or dynamism or something, in the long run, if we have only a few superstar cities where all the high skill people are clustering? For example, some people are arguing that it is a good thing, actually, if the tech industry spreads out and starts new clusters in Austin or Miami or Pittsburgh.

And part of that is, I think, rooted in thinking it's good to revitalize dying cities by spreading some of the booming tech industry wealth their way. But it also seems plausible to me that there are benefits to having new industries form in new geographic locations. Like, the computing industry was born in Silicon Valley and it seems to me like its location played an important role in shaping the culture of the industry -- that kind of hacker, utopian, youthful spirit of the industry does owe a lot to Northern California.

So I'm just wondering if you think we're missing out on some of that by concentrating our industries in a few cities that have historically been the locations of those industries.

Matt: I think there's a strong case for dispersal on those grounds. And then there's a cost benefit about, how destructive is our dispersal effort?

I think it's important to note that scarcity in San Francisco, New York does not have the desired impact of pushing industry clusters to Cleveland and St. Louis, right? That in fact the tendency of the spillover to go to Austin reflects the fact that it doesn't really work. Because Austin is already educated upscale affluent city, right? And it just gets bigger as a result of leakage out of the Bay area.

It's not the worst thing in the world, right? But it doesn't help the places that are most in need of help. So if we decide... The US political system is geographically based. Whether you think it should be or shouldn't be, it just is. And Missouri and Ohio and Wisconsin have geography-specific elected officials. So they have to come up with policy ideas that are plausibly good for Missouri.

So if it were true that restricting housing development in Northern California and the Bay area was doing great things for St. Louis and

Kansas city, I'm not sure there would be a road to halting that, or a good argument for why Josh Hawley should change that.

But it's not what's happening, right? So, I don't think that's quite as strong a case as it might be.

Now, I think it's interesting, the new industries problem just seems harder to quantify. At least I don't know exactly how one would quantify it. It seems correct to me that the computer industry is a mix of objective facts about how bits and silicon wafers work, and lifestyle characteristics that are common in the West coast of the United States, in a sort of weird way...

Julia: And values. Like the lack of credentialism.

Matt: Yeah. And well, it's like people who like hiking have certain attitudes that correlate with that, that then also influence how they run their companies, right?

So, some people put a ton of weight on, California's non-enforcement of non-compete agreements, as why industry shifted from the 128 corridor in Massachusetts over to Northern California. I've never been sure how credible that is. Because it's like an n=1 study. In which you have a plausible theoretical mechanism, but there could be a lot of reasons for that.

The Boston area does really well in biomedical, but they also have the same non-compete agreements. So what's the actual difference there? It seems a little... It seems to me that this is a bit of conventional wisdom that the software people have, that is not actually that well backed up.

And maybe if the software industry had been birthed in the Midwest where more people knew factory managers, maybe there would have been a whole more hardware orientation. I don't know.

Julia: Yeah. It is definitely one of those things that people say at dinner parties, and it's really fun to talk about. And it might well be true, but it's really hard for me to think of how we would ever have confidence, justified confidence, that it's true. So, yeah --

Matt: As far as I know, the internal office culture at Microsoft and Amazon is way less fun and wacky than at the Bay area tech companies, which maybe has something to do with Seattle versus California? But, it's like, who fucking knows.

Julia: Well put, well, put.

There's another case study that people often bring up in discussions about YIMBYism that I wanted to ask you about, and that's Tokyo. So Tokyo is this gold standard example of a city that has had its population grow steadily over the years, but has kept its rents pretty affordable -- I think the rents have been flat or something, for 10 years, or something like that -- and that is attributed to the fact that Tokyo builds a ton of housing. They have much less strict zoning laws than the US does, and other things that make housing construction much easier there.

Which makes a lot of sense to me. But I want to run an alternate theory by you and see if it makes any sense as well.

So it seems to me the housing crisis in cities like New York and San Francisco is in large part a result of the fact that those cities attract the top 1% who are a lot richer than the median American because of the distribution of incomes in the US.

And so that 1% can really easily bid up the prices of housing in New York and SF by a lot.

Whereas in Japan, they've had weaker GDP growth, but also a much slower growth of the incomes of the top 1%. So their top 1% isn't nearly as rich relative to the rest of their population as our top 1% is relative to the rest of our population. And so, in Japan they just don't have this super wealthy upper-class bidding up housing prices in their big cities, i.e., Tokyo.

And so I'm just wondering -- couldn't a skeptic say, "Well, that's the reason why housing is more affordable in Tokyo, it's not about how much they're building."

Matt: Yeah, if the housing crisis was limited to New York and San Francisco, I would find that a pretty compelling counter-argument.

But it's actually pretty widespread at this point, to all of coastal California, Seattle, the entire Northeast corridor and then also a lot of sort of college town type places... Obviously Madison, Wisconsin is cheaper than San Francisco, but it has become a lot more expensive than other comparably-sized towns in the Midwest.

And I don't think that's really because billionaires are seeking Madison out, exactly, but there is disproportionate migration of college educated professionals to Madison because it's a college town in a state capitol. And then in Austin, which has those attributes, but also good weather, and people like barbecue... and prices there have gotten very elevated compared to San Antonio. So I think the issue is too widespread.

One version of this that gets pitched all the time, particularly by writers based in New York, is that this is all about billionaires with their pied-a-terres. And my view of this is pretty heavily influenced by living in Washington, which is an affluent Metro area, but also a less hyper-skewed one. We don't have bank CEOs or tech company founders here in DC. We have, I don't know, lawyers, just like people with six figure incomes rather than nine figure incomes.

And you bid up housing because housing assets, the ownership is very dispersed, right? Compared to the ownership of stock or equity. So even Jeff Bezos owns... He owns three houses, when a normal person might own one, but --

Julia: Yeah, I mean I think the argument has way less force if it's about the 0.0001%. But the 1% might actually be numerous enough to have a huge impact on the housing market.

Matt: So I mean, it is true, that inequality impacts asset prices. I think that's undeniable. But the basic question for housing -- because the asset is land, but the commodity is housing -- is like, "Why do high land prices have so much throughput into housing prices?" And I think that's pretty clearly because you're not allowed to build multiple dwellings on the single piece of scarce land, right?

Julia: Yeah.

Matt: And then that dominates. So if you want to ask, "Well, why is land in San Francisco more expensive than land in Tokyo?" That's maybe an inequality story, and probably means that the differential can't be reduced to zero.

Obviously the fact that in Japan, nationwide, they have negative population growth is also a factor here. To me, my original Tokyo housing story that was interesting, is just that the population of Tokyo keeps growing, even though the population of Japan is shrinking. Which just tells you something about the demand for urban living.

Because in many circles, the main argument you hear against YIMBY is just something like, "Cities are bad." I used to hear, when I was in my twenties, "Well, you'll think differently when you're married and have a kid, right? Then all you're going to want in life is a yard and a car and ample parking."

And I am now married and I have a kid, and I'm more sympathetic...

Julia: But that doesn’t say anything about the overall demand for urban living relative to supply of urban living!

Matt: Yeah, no. It's a stupid argument. But is an interesting question -- if there were no quantitative limits on urban development in the Bay area, how big would it get? And I think the evidence from Tokyo is it would get really big. Possibly bigger than Tokyo. There's an infinite demand suction, that it stays cheap, but people keep coming, which is interesting.

Julia: Well, so that actually reminds me of my last YIMBY question for you which is another really common argument I see against YIMBYs, which is not obviously wrong to me is look, we would have to build a ton of new housing to make a dent in housing prices, because there's just tons of, I don't know what to call it, but pent up demand.

So, yes, supply and demand -- that relationship holds. But it would just take so much new supply to soak up all the latent demand. Say you increase supply and make prices a little bit cheaper, there will now be tons more people who weren't willing to buy before, but now are. And so they flood into the market and the price goes back up.

And so you increase supply again, which lowers the price slightly. And now tons more people are willing to buy at that slightly lower price, and so on and so forth. So you are pushing prices down, but it's just going to take a huge amount of new supply to lower prices by a meaningful amount.

And sometimes what people say to this objection is, "Great, let's just build a ton of new housing." But this is in tension with the thing that YIMBYs often say, which is to reassure people, "Look, we're not talking about building Hong Kong here. Look at Paris, that's what we're talking about."

Matt: Yeah. I do think that if a person struggling to pay the rent is like, "What are you going to do for me?" that the answer in the short term has to be, "I'm going to give you more money." Or some discount, sub-market housing.

I'm not sure that that argument is correct about how much new housing it would take, but I'm not sure that it's wrong either.

Julia: Is it an empirical question, or a logical --

Matt: I think it's an empirical question that we sincerely don't know the answer to.

And it also matters quite a bit, actually, what is the housing change we're talking about? Every city and its suburbs in America simultaneously YIMBYing seems like would have very different consequences from just the city of San Francisco YIMBYing.

And so if you are a YIMBY advocate, you both advocate for the general case, like “We all YIMBY,” but you also advocate for all the specific cases like, "Yes, Washington DC should YIMBY." But if you want to know what's the short-term price elasticity, those are totally different scenarios. Whereas, fully funding section eight vouchers has a very predictable relationship to people's incomes.

So, this is why I said I'm more of a productivity-centric person.

Julia: No, yeah, I know...

Matt: No, because I think it's really important to deliver more subsidy to low-income people. And I think that's a potentially powerful tool, to push for zoning reform and other things that I would load onto the policy bus. But the impact is hard to know, right? We're trying to generalize from a handful of cases of countries that have very different demographic dynamics, are just different in different ways.

Also, even the most ambitious YIMBY proposals actually leave quite a lot of density restrictions in place, right? Which is fine. People are trying to do politics, right? But like, Scott Wiener's bills are not talking about turning everything into Hong Kong. Quite literally, he's talking about six story buildings. So, that's how tall the buildings would be.

I don't think we know exactly what the impact of that on California would be, other than, it would accelerate GDP growth and population growth. But there's a lot of known unknowns, until we try it.

Julia: Yeah. Well, Matt, thank you so much. This has been such a delightful and enlightening conversation. I will finally let you go drink some water after talking with me straight for almost three hours.

Matt: It's grueling. It's like Joe Rogan, but a little more high tone.

Thank you.

[musical interlude]

Julia: That was Matt Yglesias, co-founder of Vox.com, who is now publishing a fantastic blog and newsletter called "Slow Boring." at slowboring.com.

I'll link on the podcast website to Slow Boring, and to the books and articles we talked about, including Matt's most recent book, "One Billion Americans: The case for thinking bigger," and his earlier book about building more housing, "The Rent is Too Damn High: What To Do About It, And Why It Matters More Than You Think."

That's all for this episode! I hope you'll join us next time for more explorations on the borderlands between reason and nonsense.