

Weekly ICBM EAR Report



Image: Illustration of the Sentinel next-generation ICBM. Credit: Northrop Grumman - Space News

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ICBM EAR, Prepared by Peter Huessy, President of Geostrategic Analysis and Senior Fellow at the National Institute for Deterrent Studies and Senior Fellow at the Gold Institute for International Strategy.

Week of June 21st 2026

Dear Friends and Colleagues in the Nuclear Enterprise.

I hosted our 27th bi-annual nuclear Triad Symposium at the beautiful LSUS campus on the 18th of June and that week I also moved to a new home with my adopted daughter to Frederick, Maryland. So, the ICBM Ear this week will be a more simplified format. I am sending you a variety of important essays and commentary on nuclear deterrence, not all of which I agree with but which needs to be considered. Next week I will be sharing with you the presentations to the Triad Symposium as well as a summary and transcript of Admiral Week's lengthy exposition on the current submarine fleet especially the Ohio and Colombia fleets.

Key ICBM Development

Senator Deborah Fischer: That reality should inject urgency into everything we do — from force modernization to industrial capacity to alliance coordination to modernizing the bedrock of our national security: our nuclear triad.

Our nuclear arsenal remains the foundation of American security, which means that maintaining the credibility of our deterrent must be a national priority.

This means getting Sentinel back on track.

The missile and warhead components are progressing, while much of the challenge lies in the infrastructure — the launch facilities and command centers that support the system.

We now have a Direct Reporting Portfolio Manager overseeing the ICBM enterprise, with centralized authorities and direct reporting lines to the Pentagon's senior leadership.

Major design and contract decisions are expected soon, which will provide greater clarity on the program's cost and schedule.

Getting Sentinel right is critical to maintaining credible deterrence.

Golden Dome Update

Secretary of War Pete Hegseth: "[On Tuesday], the first milestone test of Golden Dome for America (GDA) was a full mission success. Cutting edge directed energy was harnessed and the Dynamic Defense Autonomous Defeat (DDAD) system flawlessly and autonomously cued, targeted, and eliminated a multitude of incoming threats. This test was executed on schedule — and dynamically defeated every threat. Our elite warfighters integrated with next-generation technology to stop incoming drones and cruise missiles dead in their tracks. Traditional Primes and emerging Primes are competing, collaborating, and winning—delivering on President Trump's priority. This historic milestone was only made possible by the One Big Beautiful Bill—giving us the funding to deliver on the ultimate shield to protect America. President Trump is making President Reagan's Strategic Defense Initiative (SDI) vision a reality. With Golden Dome, the War Department will defend our homeland more powerfully than ever before. Golden Dome is real, powerful, and on track."

Summary

This week's material includes from Stephen Blank an important review of Russia's emerging and dangerous nuclear strategy which he wanted to share; Senator Deborah Fischer, the chair of the Strategic Forces Subcommittee in the SASC, lays out her prescription for nuclear deterrence.

In stark contrast, Professor Stephen Walt writes (wrongfully!) that much of the US strategic nuclear deterrent modernization effort is unnecessary and wasteful.

Rebecca Heinrichs writes with her usual top notch expertise about a key aspect of US security—the emerging Iran policy.

General (Ret) Mike Flynn of the Gold Institute writes about the changing nature of nuclear deterrence and the emerging and more dangerous balance of power among key nuclear armed nations but warns that elements in the USA want to jettison the whole notion of nuclear deterrence.

Finally, while generally not commenting on the current Administration's Iran strategy, the ICBM EAR lays out its interpretation of what the USA is seeking to achieve in what the EAR sees as a multifaceted, multi-phased goal that over time has a significant chance to succeed.

The EAR then brings you for the first time a summary of our new book--hopefully, which will be completed by the end of this year. It will be the story of two fierce but opposed nuclear camps, one of abolitionists vs another dedicated to peace through strength. The book will follow this fight between the two camps, starting when the Ear first worked nuclear deterrent issues---the SALT and ABM treaty process. The book will end with an assessment of today's complex and dangerous nuclear balance, and the role of the two aforementioned camps in putting the US where it is today.

Senator Fischer's Remarks

Senator Deb Fischer (R-NE):

<https://www.fischer.senate.gov/public/index.cfm/news?ID=0497B97F-0DF7-4E55-A16E-B77414F1FEDE>

Good morning. It's a pleasure to be here with all of you.

I want to spend my time today discussing the strategic environment America faces in the Indo-Pacific, the steps Congress is taking today to modernize our forces to meet tomorrow's threats, and the work that lies ahead to ensure the United States deters the Chinese Communist Party.

Informed discussions about U.S. investment priorities — whether nuclear modernization, shipbuilding, or autonomy — require a clear understanding of how fundamentally the geopolitical environment has shifted.

For the first time in history, the United States faces two peer nuclear adversaries at once. In addition to Russia, China is expanding its nuclear arsenal at a breathtaking pace – consistently exceeding U.S. estimates.

China is building new missile silos, increasing its warhead stockpile, and rapidly developing the full range of nuclear delivery systems.

This is not the strategic environment we planned for. The structure of our nuclear forces today was determined during a very different geopolitical moment.

The prevailing consensus was that China would remain a more limited strategic competitor. Those assumptions have been proven wrong.

China is now an increasingly capable strategic rival. President Xi is working with our persistent adversaries — Iran, Russia, and North Korea. They are sharing weapons, technology, resources, and strategic objectives.

Together, these countries are working to challenge American power, undermine stability, and threaten international security.

That reality should inject urgency into everything we do — from force modernization to industrial capacity to alliance coordination to modernizing the bedrock of our national security: our nuclear triad.

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Beyond the ICBM force, we must also ensure the rest of the nuclear triad remains strong.

The current force structure – which again was set forth in a very different geopolitical environment – is not sufficient. We must size our forces to meet tomorrow's threats — not yesterday's assumptions.

We must expand our bomber force beyond just the program of record. Considering STRATCOM's and PACOM's requirements, 100 bombers won't be enough. We need at least 200 to meet current demands.

Additionally, given the threat posed by China, the president should have a full array of options to respond to limited nuclear strikes and deter our adversaries from employing an escalate-to-deescalate strategy.

That's why I fought to authorize over \$250 million for the nuclear-powered sea-launched cruise missile in the Senate version of this year's NDAA.

It's also why I included a provision to authorize the development of two additional theater-range nuclear capabilities.

Without these theater-range capabilities, the United States risks ceding strategic advantages to China in the Pacific that could undermine U.S. maritime power in the region.

Of course, having a modern, credible nuclear deterrent with the right mix of capabilities is of little use without the assured ability of the president to command, control, and communicate with those forces.

That's why a major focus of mine is not just modernizing our nuclear deterrent but also our NC3 systems.

In the Senate FY27 NDAA, I included a provision limiting funds for the Secretary of the Air Force until the acquisition strategy for the Airborne Command Post capability has been delivered.

This capability is important to ensuring command and control of nuclear forces in a crisis.

There is another hard truth we must reckon with. The demand for ships and submarines is outpacing our building capacity.

Meanwhile, China's shipbuilding capacity, in tonnage, is roughly 230 times greater than ours.

The bipartisan Strategic Posture Commission said it clearly back in 2023.

We need more nuclear-capable shipyard capacity. We need higher submarine production rates. And we need more missile capacity across our existing fleet.

I believe the Navy should build additional shipyards that can maintain nuclear-powered ships and submarines.

This will be expensive. It will take time. But we simply cannot meet future demand without more nuclear shipyards.

During the Cold War, we had twice as many public shipyards as we do today.

Right now, we're not even on track to meet our basic goal of producing two Virginia-class submarines and one Columbia-class submarine every year.

And we're certainly not ready to take on any additional nuclear shipbuilding.

We will need more Virginia-class submarines for the AUKUS security pact we agreed to with Australia and the United Kingdom.

We will likely need more SSN(X) and Columbia-class submarines in the 2030s and 2040s.

I also continue to prioritize strengthening our nuclear industrial base. After the Cold War, we essentially abandoned our nuclear enterprise. We let facilities age and capabilities atrophy.

Now, we must modernize our entire nuclear enterprise – much of which contains one-of-a-kind facilities or date back to the Manhattan project era – without disrupting weapons production.

The Strategic Posture Commission was clear that the nuclear industrial base is a national security vulnerability. The U.S. is not producing enough scientists, engineers, or skilled technicians.

Part of remedying this means providing NNSA and the National Labs with the flexibility to recruit and retain talent competitively.

But the private sector must play a larger role in developing the workforce needed to sustain this industrial base.

These investments must not just focus on capital assets but must also include workforce development.

We should be building stronger vocational pipelines, apprenticeship programs, and partnerships with technical colleges across the country.

We need more welders, machinists, pipefitters, engineers, and technicians — and we need to treat workforce development with the same strategic urgency as weapons design.

At the end of the day, our ability to modernize U.S. shipbuilding and scale the industrial base hinges on a workforce aligned with the magnitude of the task.

Although it may not seem like it, another key influencer of U.S. maritime power in the Indo-Pacific region is homeland defense.

That's because China has systems capable of holding U.S.-based assets at risk.

The greater our vulnerability to homeland attacks, the more challenging it will be to project and employ power in the region during a conflict with China.

This brings us to Golden Dome. The United States needs a stronger missile defense system.

That's why, in 2024, I introduced legislation requiring the Secretary of Defense and Chairman of the Joint Chiefs of Staff to develop a comprehensive integrated air and missile defense architecture for the United States, which was ultimately included in the FY2025 NDAA.

When President Trump began his second term, he supercharged these efforts. He brought the attention, the energy, and the resources needed. He did this by establishing Golden Dome for America. His focus here is welcome because the threat is real, and it's growing.

China has built the world's most advanced hypersonic arsenal. And China has historically run up to twenty times more test flights than we have.

It should alarm every American that our adversaries are racing ahead with these weapons.

While the United States is protected against a limited ICBM attack from a rogue nation by ground-based interceptors in Alaska and California, these systems were never built to stop

advanced cruise and hypersonic missiles.

This is precisely why Golden Dome is essential. As Chair of the Strategic Forces Subcommittee, I'm working closely with General Guetlein and Department leadership as they finalize the design, the schedule, and the long-term funding needs.

We provided initial funding last year. And I used this year's NDAA to update the annual reporting requirement for Golden Dome to help keep it on track.

But this is going to require sustained investment over many years.

Last August, I traveled to the Indo-Pacific. I visited Taiwan, Palau, Guam, and the Philippines. And earlier this year, I visited China.

These trips made one thing clear. It is critical that we support our allies and partners in the region.

We also need to ensure our U.S. presence in the Indo-Pacific is well defended, including over 170,000 U.S. citizens on Guam. I also secured a requirement for full, 360-degree radar coverage around Guam in this year's NDAA. And I authorized the funding to make that happen.

Taken together, these provisions send a clear message that America's capabilities remain strong and credible to project power and deter Chinese aggression.

Let me close with this. We face serious challenges as we navigate China's growing military buildup in the region. But with strong leadership and sustained investment, we can maintain a free and open Indo-Pacific.

Two Windows & No Net: Fifty Years of Nuclear Highwire

For the past half century there has been a bitter and fierce fight among American nuclear experts over the future requirements of nuclear deterrence. On one side have been abolitionists. They have often and variously sought a world of a small even a minimal USA nuclear arsenal, a freeze on US nuclear development, a ban on missile defenses, and arms control as a priority. Most recently they have adopted a campaign to actually eliminate nuclear deterrence itself. These are determined advocates, intellectually clever and often well-funded but also intellectually able to capture public support by securing the embrace of academia, Hollywood, much of the news media, and powerful elements in Congress. Recently, two movies, *Oppenheimer* (2023) and *Dynamite* (2025) have led this abolition campaign along with Annie Jacobsen's book *On Nuclear War* (2024).

On the other side are the peace through strength advocates. These folks have fought the abolitionists and freeze advocates for most of the nuclear age, starting with the conflict over the development of the H-bomb in the 1950s to the various nuclear modernization efforts under Eisenhower and Kennedy, Reagan and Bush, and now Obama, Biden and Trump, including proposals to build missile defense, and sharp arguments whether the Russian and Chinese have adopted an escalate to win nuclear strategy that threatens to engulf the globe in a nuclear conflagration.

The strength folks are smart and passionate advocates but have witnessed some serious mistakes as the US pursued various nuclear developments, including seeing the adoption of detente, the SALT arms control framework, unilateral theater arms cuts and an assumption that with the collapse of the USSR there was no longer a need for a robust, second to none, USA nuclear deterrent.

The stakes in this fight could involve the future fate of western civilization itself. One of these parties could be disastrously wrong and thus the future outcome of this fight is not to be lightly dismissed as unimportant. Both sides have made significant mistakes, but thankfully with the country saving itself by going in the right direction, but only after as Churchill quipped, the US tried everything else first.

The fights we explore from 1969-2026 the author has witnessed, especially the multi-long decades fight over the ICBM leg of the US nuclear triad. This fight, especially in Congress, epitomized the fight between the abolitionists and the peace through strength parties. The ICBM leg of the USA nuclear force has been the target of more attempts to stop funding than any other element of the USA department of defense. In the 1981-88 period, House and Senate opponents of the MX missile proposed 54 separate votes trying to kill the ICBM leg of the triad, particularly noteworthy the spring 1985 where there were 16 sequential votes from April through May just on funding the Peacekeeper ICBM.

America faces an uncertain security future. Russia appears to be unwilling to admit it's losing in Ukraine and will prolong the destruction in Ukraine until such time as the security forces in Russia remove the reckless leadership. China despite its serious demographic and economic challenges, seems determined to accelerate its all-encompassing and unrestricted war against the West and particularly the United States having adopted a nuclear strategy favoring proliferation for its friends and coercion and blackmail against its enemies.

These two camps often don't take each other seriously. The peace through strength folks are described as war mongers and military profiteers while the abolitionists are often dismissed as appeasers, (a failing this author admits to having grasped a few times.)

This book—*Two Windows: The Perilous Nuclear High Wire Act*—is the story of this fierce fight starting with what then private citizen and candidate Ronald Reagan called the "window of vulnerability" to a second open window of

vulnerability—the presence of two nuclear armed peers that both have adopted battlefield escalate to win nuclear strategies.

The Iranian Project by the ICBM Ear

The Iran project if you will is sequential & not all at once ... timing is critical. Here is what has been accomplished, and what still needs to be accomplished. Of significance is that Iran pledged to stop making war on the Middle East. Are they lying? Probably but never before has the government of Iran ADMITTED they are making war on the Middle East. That is in itself a major admission which is central to the US objectives of correcting portraying Iran as the rogue terror element in the region.

First the US took down the Iranian conventional military so they could not significantly harm international shipping - and oil production and refining in the Gulf area.

Second the US buried the enriched uranium under rubble as well as the centrifuge halls where the machines operate.

Third the US sought to gather all the Gulf state Arabs on the US/Israel side and expand the Abraham accords.

Fourth the US blockaded Iranian oil exports and refined Iranian oil product imports so as to reduce the Iranian exchequer by some \$450 million a day.

Fifth the plan was to cause a schism within the Iranian leadership so that the IRGC doesn't call all the shots. The US would accept the word of the non-crazies and simply ignore the word of the jihadis.

Sixth the US opened Hormuz (yes, the IRGC will subsequent continually claim they control the Gulf but they don't.

Seventh, create an alternative insurance system from Lloyd's of London, who along with the British government attempted to sabotage the agreement under the strange idea that regime change in Iran will splinter the country and give us more than one active nation devoted to Armageddon. An alternative shipping insurance system is reportedly being backed by the elements of the Greek Shipping Industry which owns 40-60% of the world's ocean going fleets. This allows the Hormuz strait to open and oil to fall below \$70/barrel.

Eighth most industrial nations were running out of oil as their reserves were quickly dwindlinghuge diplomatic pressure was being put on Iran to agree to a deal.

Ninth: we know what Iran does with its nuclear material, including if they seek to enrich it further.

Tenth get IAEA to inspect and down blend all enriched material (which has been agreed to although Iran did say they are the only ones that can make such a decision.)

Eleventh; extend negotiations for 60 days to determine the disposition of the Iranian nuclear fuel, which will be the only subject of discussion how to get rid of dispose of and eliminate this nuclear material, not as was done under the JCPOA to discuss what better centrifuges the United States could provide the Iranians, which was required by the agreement. The alternative to an agreement getting rid of the nuclear material it's to further destroy IRGC infrastructure and other critical elements of the Iran economy.

Twelve, while there will be the release of some escrowed or sanctioned oil revenue to the Iranians, it will be in part only for the purchase of food and agriculture products, healthcare, and other necessities for the population at large, including the purchase of American agricultural production. The transactions are in American dollars and regulated by the international banking system to further provide at least some transparency and incentives so the funds are not diverted to terrorist organizations.

Twelve: the US treasury will continue to go after the financing of Hamas Hezbollah, Islamic Jihad and the Houthis in a campaign to reduce their capabilities and eventually put them out of business.

Taken together, no American president has attempted to do this primarily because with USA oil production at an historical 5 million barrels a day average for decades, (peaking at 10m b/d in 1973), the US was continually subject to blackmail by Iran and other Arab state petroleum producers.

This blackmail artifice was started by Arafat and the PLO who promised not to attack European soil or kidnap or hijack their airplanes or assassinate their officials in return for being left alone, left in a sanctuary to carry out their terrorism including against Israel and apostate Arab nations, such as Jordan or Morocco. The PLO was largely an invention of Moscow and the Patrice Lumumba (aka as Terrorism University), where Khomeini, Soleimani, Arafat, Abbas Ortega and other terrorist luminaries were educated. A top ranking PLO official as far back as 1964 admitted the cause of “Palestinians” was a wholly made up fiction. <https://www.amazon.com/Comrade-Ayatollah-Islamic-Revolution-Khamenei/dp/1595845216>

Thirteen, with the current production of oil over 14 million barrels of oil a day and 26 million barrels a day of petroleum and natural gas liquids, the United States is independent of foreign and especially Persian gulf oil and therefore has the diplomatic leverage to take on the Iranian regime without risking a nationwide recession.

Fourteen, the Iranian regime has had nearly 50 years to establish, maintain and sustain their terrorist organizations, and therefore it will take some time for the United States to significantly degrade the capabilities of these terror organizations, but here the only serious question is hopefully when not what. (The extent to which Hezbollah has established military infrastructure in Lebanon, for example, is astonishing, even as the US funded the Lebanese government to help counter Hezbollah and Iran.

Fifteen, another phase of the deal will take an ongoing effort. The Kurds and others within Iran need to be organized and supported to go after the IRGC. Seizing territory is an option while declaring that the new resistance will not recognize the authority of the IRGC and its allies. An objective will be to coalesce other minority groups in Iran which collectively make up 51% of the population. Add in the Iraqi Kurds and you have a significant resistance force against the regime—which the current split in authority in Tehran helps considerably.

This then are the tri-partite short, mid, and long term plans re eliminating the regime in Iran. It cannot be done all at once and requires new elements in Iran to go into a different direction than the IRGC or mullahs, with the mullah leadership decimated and the IRGC running out of money with a great number of defections.

This is the plan which was crafted with great thought and specifically with the USA not putting boots on the ground. This is a struggle that must be won by the Iranian people and is the only way forward. It may or may not succeed. But it is the first such plan that has a high chance to succeed. No previous President has tried this. Critics and skeptics should read Mr. Warren Norquist's essay in 2000 “How Ronald Reagan Won the Cold War.” It is published in the National Intelligencer and was first published in a management consultant journal. It details in graphic form the financial, diplomatic, political, economic, and military campaign that President Reagan led against the USSR. It worked despite all the grand smarty pants in the media, academia, and Hollywood who said it would fail.

Professor Walt Says It Makes No Sense for the US to Modernize Its Nuclear Forces

Professor Walt thinks the US DoW should save tens of billions by eliminating what is describes as unnecessary nuclear weapons, as these weapons are being acquired to achieve both nuclear superiority and go beyond what previous arms control agreements allowed. He is actually totally wrong. Everything the USA is building and in the current numbers is allowed by the 2010 New Start treaty —400 Sentinel land-based ICBMs, 12 Columbia submarines, and 100 Raiders of which 20 would be nuclear armed. Most of the funding for nuclear systems is not for building new systems. In FY2026 Senator Hoeven explained that the US was spending \$17 billion annually on new modernization. That number is probably now just above \$21 billion but the remaining funding upwards of \$31 billion for NNSA and another \$20 billion is for the sustainment and maintenance of the existing US Triad including NC3, warheads, and ICBMs that are 56 years old, submarines that are 30-42 years old, B52 bombers now approaching 70 years and a B2 bomber that stopped production in 1997.

His proposal makes zero sense.

To acquire Sentinel, Columbia and its upgraded D-5 missile and 20 B21 nuclear bombers and their cruise missiles costs \$375 billion over the next 20+ years. The new systems together over 20 years would save if completely shut down no more than an average of \$20 billion over the next year, or about equal to what the Somalians defrauded the government in Minnesota and Ohio and Michigan. Senator Hoeven says the FY2025 mods are legged at \$17 billion a year, now about \$21 billion in FY26. As Admiral Charles Richard, the former commander of US Strategic Command explained, not spending this modernization funding leads you to disarmament. The current systems

are 40-70 years old and will soon be obsolete, rusting to obsolescence as Clark Murdock put it. The only way modernization makes no sense is if you believe unilateral disarmament is better.

In short, Professor Walt is clever and perhaps even popular. But dead wrong.

In the Nuclear Age, Is Victory Worth It? By General Mike Flynn

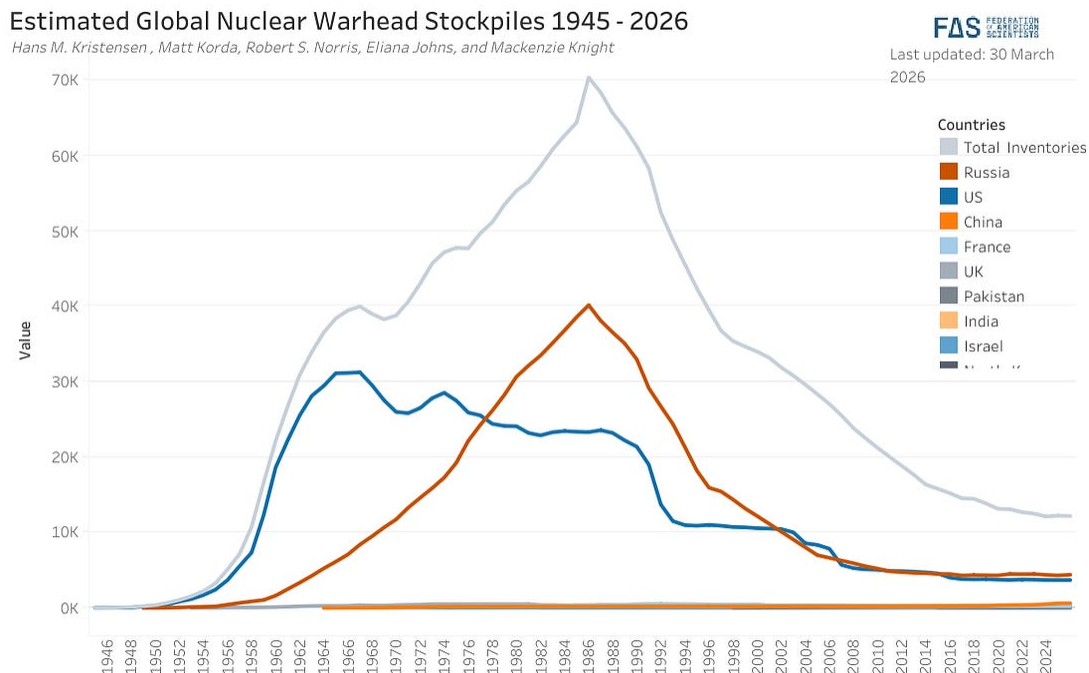
The Doomsday Clock reads 89 seconds to midnight. Reflecting growing concerns about multiple risks, including:

- Biological threats and advances in biotechnology.
- Increasing geo-political tensions
- Failures of international leadership and cooperation.
- Artificial Intelligence.
- Nuclear tensions

Nine nations are widely recognized as possessing nuclear weapons, yet many of the major Cold War-era nuclear arms control agreements have either expired, been terminated, or are no longer being implemented. This is the reality we face, and we must be prepared to navigate it with resolve, adaptability, and purpose.

What we are witnessing leaves no room for complacency. This is a defining moment that calls on all of us, across the globe, to awaken to the challenges before us and respond with the urgency they demand.

In February 2026, the New Strategic Arms Reduction Treaty **expired**. For fifteen years, that treaty capped Russian and American deployed nuclear warheads at 1,550 each. The treaty was imperfect and compromised by counting rules that permitted ambiguity. But it existed. It provided communication channels between Moscow and Washington. It established red lines that both sides understood. It reflected an assumption that both superpowers feared nuclear war more than they feared each other.



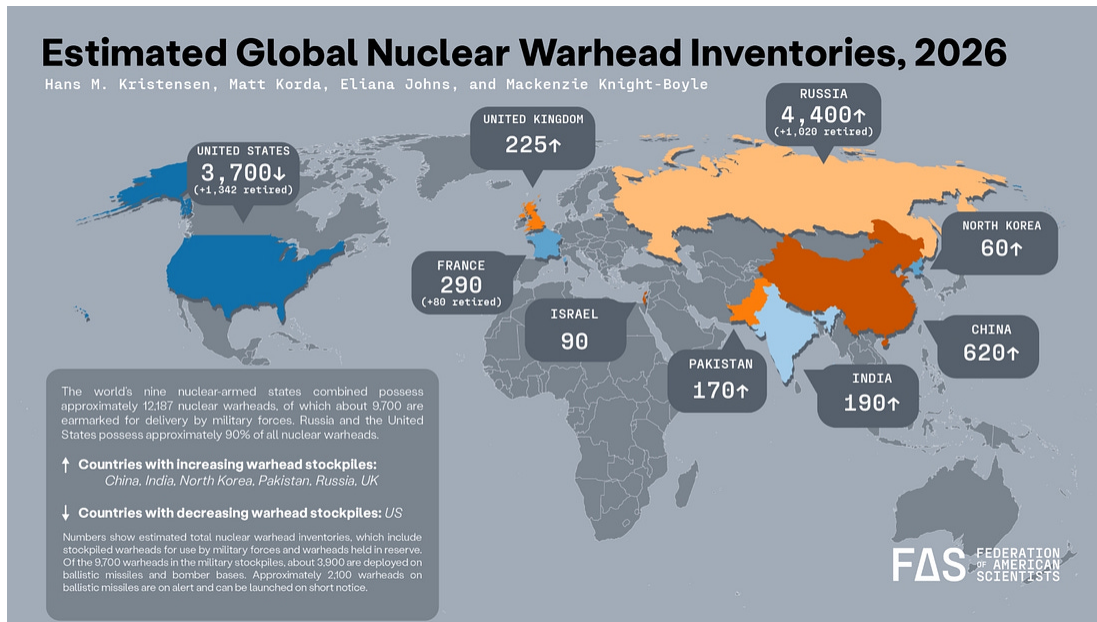
Source: Federation of American Scientists

That framework no longer exists. There is no successor agreement in place. The United States and Russia are not engaged in arms control negotiations. There is no bilateral dialogue on nuclear doctrine, escalation thresholds, or crisis management. Moscow is modernizing its arsenal without constraint. Beijing is doing the same. ***Washington is debating whether nuclear weapons should even be part of American strategy.***

This represents strategic malpractice at the highest levels.

The reality we face is stark and demands clarity. Russia maintains approximately 5,977 nuclear warheads, with over 1,700 deployed on active systems. The United States possesses roughly 5,044 warheads, also heavily deployed. Together, these two nations control 87% of the world's nuclear inventory. China operates about 600 warheads and is expanding aggressively, with projections placing its arsenal at over 1,000 by 2030. France maintains 300 warheads. The United Kingdom holds 225 warheads. India and Pakistan each possess roughly 160 warheads, locked in a rivalry that erupted into open military conflict in May 2025 and could escalate to nuclear war at any moment. North Korea has assembled roughly 50 warheads and is receiving technological assistance from Russia. Israel maintains approximately 90 warheads under a policy of deliberate strategic ambiguity.

That is the picture confronting the United States. **Nine nuclear powers** collectively control 12,200 warheads without an international framework constraining deployment or use.



Source: Federation of American Scientists

Five flashpoints demand American attention and immediate strategic focus:

- **Russia and NATO.** Moscow's military doctrine explicitly permits nuclear first-use in response to a conventional attack deemed to threaten Russian territory, and with New START expired, Russia operates under no numerical ceiling on warhead deployment.
- **Iran and the Middle East.** The Trump administration correctly assesses that Iran does not currently possess nuclear weapons, yet significant uncertainty remains regarding Iran's intentions, the status of its nuclear program, and Tehran's willingness to escalate regional conflict in ways that could trigger miscalculation and uncontrolled escalation between American, Israeli, and Iranian forces.
- **India and Pakistan.** These two nations clashed militarily for 88 hours in May 2025, involving drones, missiles, and active nuclear brinkmanship, and the boundary between controlled conflict and uncontrolled escalation remains razor thin.

- **North Korea.** The regime is actively developing intercontinental ballistic systems and receiving technological assistance from Russia in exchange for troops deployed to Ukraine.
- **China and Taiwan.** China is preparing military options for the unification of Taiwan, while the United States has committed to Taiwan's defense, creating a scenario where escalation from conventional conflict to nuclear exchange becomes plausible.

These are not theoretical exercises or academic scenarios. These are operational contingencies that military planners in Washington, Moscow, Beijing, New Delhi, and Seoul are actively preparing for.

The non-proliferation regime that successfully prevented nuclear proliferation for decades is collapsing. Saudi Arabia signed a mutual defense agreement with Pakistan in recognition of shifting regional security dynamics. South Korea and Japan are publicly discussing weapons programs. Turkey and Poland are questioning the credibility of American nuclear guarantees and considering whether domestic nuclear capability is necessary for security. France has announced plans to expand its nuclear arsenal. When the political leadership of allied nations concludes that America's nuclear umbrella cannot be relied upon, they pursue their own deterrents. This proliferation cascades. When one regional power acquires nuclear weapons, others inevitably follow. Proliferation becomes self-reinforcing, creating instability that benefits no one.

The collapse of the international framework that managed nuclear risk for fifteen years demands strategic reckoning at every level of American leadership and society. The absence of successor agreements, the silence on bilateral communication channels, and the decision to permit two decades of arms control progress to evaporate represent a fundamental departure from the strategic discipline that defined the Cold War and the post-Cold War era.

American forces must be prepared for contingencies that we hope to avoid but must nonetheless plan to manage or defeat. The assumptions that governed military planning for the past thirty years are no longer valid. Doctrine, training, force posture, and strategic communication must reflect the world as it exists, not as we wish it to be.

American citizens must understand that this is not a foreign policy abstraction debated by specialists in think tanks. It is a foundational question about whether the nation can sustain the principles and institutions that have governed its survival. The nation has a Constitution that limits executive power and preserves civilian control over matters of war. The nation has inherited from previous generations a strategic position earned through military sacrifice and strategic discipline. The nation has a responsibility to the generation that will inherit the consequences of today's choices. That responsibility cannot be outsourced or delayed.

For eighty years, since Hiroshima, no nuclear power has employed a nuclear weapon in anger. Not once. That record is remarkable and reflects deliberate decisions made by political and military leadership to constrain escalation and fear the consequences of nuclear war more than they feared each other. Those decisions are no longer being made. The political will to restore strategic frameworks has evaporated. The sense of shared vulnerability that once unified adversaries around mutual survival has dissolved into competitive posturing and strategic ambition.

The moment to rebuild strategic stability is here. American leadership, military and civilian alike, must act now with the clarity and urgency that characterized the Cold War generation.

The price of delay is incalculable and irreversible.

Rebecca Heinrichs

In [National Review](#), [Rebecca Heinrichs](#) says that there isn't much for Americans to like in the memorandum of understanding between the United States and Iran, which requires the US to lift its naval blockade of the Strait of Hormuz and ease sanctions on Iranian oil. On [Fox Business](#), Heinrichs also argues the US should not be excited about the Islamic regime allowing international inspectors into the country. Instead, she says international authorities should be able to conduct intrusive inspections of Pickaxe Mountain and other military installations.

Read the article [here](#) and watch the interview [here](#).

Commentary from Moscow

Speaking at a foreign policy forum on Wednesday in Moscow, Kremlin spokesman Dmitry Peskov warned that the global security system was “eroding” and said that nuclear deterrence is the “only” bulwark protecting the world from a “global war.”

IAEA Director General Rafael Mariano Grossi reaffirmed that Iranian nuclear enrichment sites would be visited by inspectors from his agency, citing language from the recently signed U.S.-Iran agreement.

“Taiwan says warning time for any China attack is shortening.”

Speaking at a foreign policy forum on Wednesday in Moscow, Kremlin spokesman Dmitry Peskov warned that the global security system was “eroding” and said that nuclear deterrence is the “only” bulwark protecting the world from a “global war,” Agence France-Presse reported. Separately, North Korean leader Kim Jong Un said that the commissioning of a new 5,000-ton destroyer shows that the program of equipping the DPRK’s Navy with nuclear weapons “is following its planned course unerringly,” according to Agence France-Presse, which cited state-run media published on Wednesday. And IAEA Director General Rafael Mariano Grossi reaffirmed that Iranian nuclear enrichment sites would be visited by inspectors from his agency, citing language from the recently signed U.S.-Iran agreement, the Associated Press reported.

Social Media

“Taiwan says warning time for any China attack is shortening,” according to a post from the Straits Times. Separately, Secretary of War Pete Hegseth wrote: “[On Tuesday], the first milestone test of Golden Dome for America (GDA) was a full mission success — and I was honored to witness it firsthand. Cutting edge directed energy was harnessed and the Dynamic Defense Autonomous Defeat (DDAD) system flawlessly and autonomously cued, targeted, and eliminated a multitude of incoming threats. This test was executed on schedule — and dynamically defeated every threat. I watched our elite warfighters integrate with next-generation technology to stop incoming drones and cruise missiles dead in their tracks. Traditional Primes and emerging Primes are competing, collaborating, and winning—delivering on President Trump’s priority. This historic milestone was only made possible by the One Big Beautiful Bill—giving us the funding to deliver on the ultimate shield to protect America. President Trump is making President Reagan’s Strategic Defense Initiative (SDI) vision a reality. With Golden Dome, the War Department will defend our homeland more powerfully than ever before. Golden Dome is real, powerful, and on track.” And Inside Defense posted: “Army easing White Sands logjam with new test ranges modeling Ukraine’s [electromagnetic spectrum] environment.”

Admiral Blair Essay on China

The Mirage of China's Military Edge

Panic Is Misguided—and Counterproductive

Dennis Blair

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Matt Murphy

If China were to seize control of Taiwan by force, it would be a disaster, not only for Taiwan but also for the United States. A nearly \$1 trillion economy would leave the free-market system and be incorporated into China's state-directed, mercantilist one. A vibrant democracy nurtured and defended by the United States for many years would be snuffed out. American power and influence would be gravely diminished in East Asia, and China would become the region's dominant power. Other governments there would be pressured to accommodate China's political, economic, and even territorial demands. Beijing would certainly insist that they kick out U.S. forces. China's global ambitions, meanwhile, would only grow.

Whether any of this might come to pass, however, hinges on China's ability to take and hold Taiwan. The high-paced military buildup Beijing has undertaken over the past 30 years has yielded impressive improvements, and China's interest in expanding its power and influence is obvious. But until China can be confident that an invasion of Taiwan would succeed—a lofty threshold to reach—improving capabilities and clear ambition are not enough reason for Beijing to use force. Military aggression short of a full-scale invasion would be foolhardy: it would not deliver the Chinese Communist Party the political ends it seeks, and it would risk the party's grip on power.

The reality today is that China is not capable of conquering Taiwan. Nor is it likely to gain this capability any time soon. China's buildup once threatened to shift the military balance in Beijing's favor, but trends in military technology now favor Taiwan and the United States, not China. Recognition of China's threat has motivated not just Taiwan and the United States but also Japan, the Philippines, and other countries both in the region and beyond to act to deter aggression by Beijing. Chinese leaders can still issue threats, run simulated attacks, and violate Taiwan's maritime borders. For the foreseeable future, China can at any time inflict massive damage on Taiwan with military force. The danger is great enough to constrain Taiwan's policies, deterring Taipei from declaring independence and compelling it to make the occasional political concession. Yet without the ability to conquer, China is constrained, too, and any rational Chinese government will avoid taking military action in the first place.

This stalemate has persisted for the past three-quarters of a century, since Chiang Kai-shek lost the Chinese Civil War on mainland China and fled to Taiwan. Maintaining it depends, in part, on understanding the current military balance. Alarmist predictions that China is outpacing the United States and will soon be able to win a war for Taiwan can encourage China and discourage combined action by Taiwan and its supporters. These pessimistic readings make it more difficult for Chinese leaders to accept the reality of the stalemate and return to their strategy of biding time when it comes to Taiwan.

COMING UP SHORT

Around 1990, Chinese leaders decided that the country was sufficiently wealthy to increase its military spending. The question was what to spend the money on. If Beijing had been single-mindedly focused on "reunification" with Taiwan, it would have put all its defense resources into a short-range amphibious and air assault capability to invade and conquer the main island. This would have included short-range anti-aircraft and antisubmarine defenses to protect the invasion force against Taiwanese and American counterattacks until it could defeat the Taiwanese army and occupy the entire territory. China's People's Liberation Army would have invested in thousands of landing craft and hundreds of amphibious ships to transport tanks and other vehicles. It would have procured surface-to-air missile systems to shoot down targets in Taiwanese airspace, as well as nonnuclear submarines, antisubmarine mines, and maritime patrol aircraft to take out enemy submarines near the Chinese coast.

But that is not what China did. Instead, it distributed its investments to serve multiple objectives. It built a force that could project modest maritime power globally; help China better defend its maritime borders, where Beijing has long felt vulnerable; and harm Taiwan but not conquer it.

To project power, China built blue-water amphibious ships capable of deploying worldwide—but not enough of them to land the forces necessary to invade Taiwan. It also built large, expensive aircraft carriers, which are useful for diplomatic signaling and shows of force in peacetime but require too much support and defensive protection to be used in a Taiwan invasion. It invested heavily in space capabilities, which are needed for global operations but not a localized conflict. And more recently, it has been expanding its nuclear arsenal. Before this buildup, its arsenal was perfectly adequate for deterring potential American nuclear escalation in a conflict over Taiwan. Yet Beijing now seeks nuclear parity with Moscow and Washington to ensure that China's interests and demands are taken seriously in every region of the world.

China's military buildup is not as dazzling as it may appear.

To bolster its maritime defenses, China developed long-range missile systems and submarines, supported by surveillance systems, to engage U.S. air and naval forces in Japan, Guam, and the western Pacific. Today, its air-independent propulsion submarines can remain underwater for about two weeks, and its nuclear submarines for months, enabling them to attack American battle groups thousands of miles from China's coast. Its medium- and long-range missiles can strike fixed targets ashore and surface ships at sea. These investments in submarines and missiles gave China an advantage because it costs much more for the United States to defend against them than it does for China to produce them. China also built formidable air and missile defenses to protect its forces and bases in the military districts along its coasts. Beijing's strategy in this case was to overcome an enemy's offensive advantage with quantity, amassing a thick belt of radars and missile batteries. Finally, China has developed and deployed space- and ground-based long-range reconnaissance systems (used to find and track American battle groups) and sophisticated electronic warfare systems. All this would be useful in a potential invasion of Taiwan—Chinese systems could target the American forces that would come to Taiwan's aid—but the capabilities are designed primarily to protect China's maritime frontiers.

On the whole, China's military buildup is not as dazzling as it may appear. The People's Liberation Army in 1990 had virtually no maritime power-projection capability, so although it is advancing at a rapid pace, in absolute terms it is now roughly comparable to those of France, Japan, or the United Kingdom. And despite the recent emphasis on maritime capabilities, the PLA is still dominated by the army and led by officers with education and experience in ground operations. In my conversations with Chinese army generals since 1999, many have shown breathtaking ignorance of the basics of maritime warfare. Long-range antiship missile systems are not even operated by the navy or integrated with other naval forces, which will hamper their effectiveness in combat. Meanwhile, massive corruption has not only wasted some of China's military investment but also undermined the combat leadership skills of senior PLA figures. An aptitude for bribery and displays of personal loyalty do not transfer to mastery of maritime operations. Finally, and most important, China's military buildup alarmed Taiwan, the United States, Japan, and the Philippines. All four have responded with military buildups and tighter cooperation.

This is not to say China's military buildup has not produced weapons systems that would eventually be valuable in conquering Taiwan; it has. And in the meantime, it has deterred the Taiwanese government from declaring independence and raised the military cost of U.S. intervention on Taiwan's behalf, thereby undermining Taiwanese confidence in the likelihood of American support in the event of conflict. But China's large submarine and surface combatant fleet, modest numbers of amphibious ships and aircraft carriers, arsenal of medium- and long-range missiles, dense air and missile defenses, and worldwide surveillance and electronic warfare systems do not add up to the capability to take and hold Taiwan. The most important shortfall, as a December 2025 Pentagon report highlighted, is amphibious lift—the ships and aircraft needed to transport vehicles and troops in sufficient quantities to invade the main island. China's navy does not have enough guns to soften up landing areas and neutralize defending support forces ashore, either. Its air force cannot fill the gap with precision airstrikes. And the PLA's large-scale exercises do not emphasize improvisational skills among lower-level commanders; the ability to take initiative is often decisive in amphibious assaults that never go according to plan.

American war games confirm that, although the new systems the PLA has fielded in recent years have cut into Taiwanese and American advantages, they have not overcome them. China, in these simulations, has been able to inflict increasing levels of damage on Taiwanese and American military forces and on Taiwan itself, but not to seize and hold the large, strongly defended island. A few well-publicized war games conducted by American civilian think tanks using unclassified data resulted in Chinese victories. These results occur when the United States is slow to respond to an attack and when the game models give too much weight to China's superior numbers of long-range missiles and do not account for various countermeasures that can render these Chinese systems ineffective. These models simply cannot replicate decisive maritime battles that involve an invasion and engage large naval forces. In more sophisticated simulations of a Taiwan invasion that the Department of Defense held in the past decade, played with all the highly classified systems from both sides, China was consistently thwarted in achieving its objective of conquering the island.

NO GOOD OPTIONS

Chinese forces could successfully conduct offensive operations against Taiwan short of a full invasion. The trouble for China is that these limited military options, even if initially successful, would not achieve its goal of reunification. In fact, they would make reunification more difficult for Beijing to achieve—and undermine the party's authority at home.

Consider air and missile strikes. With its present capabilities, China can strike a variety of targets in Taiwan, and Taiwanese defenses can only partially blunt the attacks. The most likely targets would be military bases. Yet the damage would be limited because Taiwan has buried many of its important military sites and developed plans to disperse and conceal mobile systems such as aircraft, missile launchers, and armored vehicles. Strikes against critical infrastructure, industrial sites, or government facilities are also possible. But they would damage property and kill or injure the citizens that China claims as its own, encouraging international opposition to China's actions and hardening Taiwanese determination not to surrender. American campaigns against Serbia in 1999 and Iran this year have shown the limits of relying on airstrikes to bring about rapid capitulation to political demands.

It is also within China's power to impose a sea and air blockade; Taiwan alone cannot prevent it from doing so. Yet blockades come with complications that undercut their coercive power. There is no legal justification for a blockade that stops neutral merchant vessels with nonmilitary cargoes, and such a blockade invites international retaliation. When shipping is threatened, insurance rates increase, but the Taiwanese economy has the capacity to adjust. The United States and other countries in the region friendly to Taiwan would most likely help it lift a sea blockade by organizing a convoy system. These countries would send their own naval forces to escort and protect merchant vessels, following a northern route that could run largely through Japanese territorial waters and a southern route through Philippine territorial waters. China could announce an air blockade, but the only way to enforce it would be to shoot down airliners. Countries that have done so—such as Russia in its downing of a passenger jet flying over Ukraine in 2014—have paid a heavy price in international condemnation.

Another option would be to seize outlying Taiwanese islands. Taiwan administers and defends scores of islands, including some that are close to the Chinese coast, a large cluster in the Penghu archipelago off the Taiwanese coast, and several in the South China Sea. Taiwan cannot prevent the PLA from occupying some of the islands, but none is vital to the Taiwanese economy. Nor does Chinese occupation affect Taiwan's defense of the main island.

A news report on Chinese military drills around Taiwan, Beijing, December 2025 Tingshu Wang / Reuters

A final option would be to decapitate Taiwan's leadership and then bring about a coup. China actively courts and rewards friendly politicians and citizens in Taiwan and undoubtedly has recruited agents among them. If these agents, with the assistance of Chinese special forces, could capture or assassinate elected Taiwanese leaders, it might be possible for China-friendly politicians to subvert Taiwan's legal succession mechanisms and take power. This would be an extremely high-risk gamble for China. Success would depend on its ability to neutralize Taiwan's security forces, both military and police—a difficult feat.

Any of these operations would almost certainly draw a strong global response. In addition to diplomatic censure, many countries would likely introduce sanctions and suspend trade and investment. China is especially vulnerable in the energy sector; the country imports a large portion of its energy, much of it by sea, and the United States could quite easily block China-bound oil and liquefied natural gas from passing through the Strait of Malacca. Sanctions that curtail China's access to the international financial system and to commodity markets could set back the country's growth, too. Beyond economic punishment, Chinese military aggression would provoke a rapid military response. Washington's current limitations on military assistance to Taiwan would end. The United States would quickly supply weapons and munitions to the Taiwanese military and deploy reinforcements to Japan, the Philippines, and probably Taiwan itself.

The only favorable outcome for China from any gambit against Taiwan would be Taipei's capitulation to Beijing's political demands. But the chances of any concession—much less Taiwan's agreement to become a province of China—are slim. The populations of countries under attack tend to become angry, patriotic, and supportive of their governments' efforts to stand up to the aggressor, and the Taiwanese public would likely be no different. Encouraged by worldwide condemnation of and economic pressure on China, military reinforcements from the United States, and the support of Japan and the Philippines, Taiwan would most likely defy China.

It would be reckless of China to count on Taiwanese capitulation.

Some analysts cast doubt on whether Taiwan would fight back if it came under attack. They point out that Taiwan's military budgets have been inadequate for years, its reserve forces are poorly trained, and its civil defense measures have atrophied. They contend that many citizens do not think Taiwan has an effective deterrent against China other than Washington's ambiguous security guarantee. In their view, if deterrence failed, Taiwan would surrender.

Yet I have been visiting Taiwan since 2002 and have seen more cause for optimism. The Taiwanese armed forces have serious defensive plans that are backed by impressive capabilities. They carry out exercises to test these plans under realistic conditions, and they will defend their country. Elected politicians have been raising Taiwan's defense budget substantially, from roughly \$10 billion in 2015 to \$18 billion in 2025. Taiwanese defense planning is now based on the assumption that Taiwan must hold off a Chinese attack for several weeks until American forces can arrive in numbers. The government has extended the term of conscription for military service in Taiwan from four months to a year, and civil defense planning and drills have been incorporated into Taiwan's annual defense exercises. It would be reckless of China to count on quick Taiwanese capitulation.

And if Taiwan does not make concessions after a Chinese military operation, Beijing's remaining choices are risky. It could back down: stop the air and missile strikes, pause its amphibious operations against outlying islands, or withdraw the blockade. China would of course cover its retreat with a barrage of propaganda telling its population that it had taught Taiwan a lesson and set back Taiwanese independence, that China can endure international sanctions, that reunification will happen someday. Yet these claims would ring hollow, and much of the Chinese public would see the military action as reckless and unsuccessful. Their support for the party would weaken. The other option for China would be to escalate. It could strike more targets in Taiwan, invade another outlying island, or enforce a blockade by engaging U.S. and other forces deployed to circumvent it. As long as Taiwan did not capitulate, however, China would continually face the same choice of retreat or escalation. With each escalation, China would find it harder to back down. Eventually, China would have to decide whether to invade.

Only by that point, the political and military risks would be even higher than before. International diplomatic and economic penalties against China would have risen, as would the expectations of the Chinese public. There would have been time for Taiwan to mobilize its forces and deploy planned defenses, for the United States to deploy forces to bases in Japan and operating locations in the Philippines, and for the Japanese and Philippine armed forces to prepare their own defenses. American forces might well have deployed onto Taiwan itself. What was previously a difficult military operation for the PLA would become virtually impossible.

SHOCK, NOT AWE

As an alternative to a time-consuming escalation sequence with a high likelihood of failure, China might consider a surprise attack on Taiwan. Its objective would be to secure control of the main island quickly, before American help could arrive, thus deterring the United States from what would be a challenging counter invasion. China would be betting, too, that it could withstand international economic sanctions for as long as they are in place.

Yet a surprise invasion runs significant risks of its own. To preserve the element of surprise, an invasion force and its support must be smaller in scale than a full mobilization of the Chinese military. If China used a routine PLA exercise around Taiwan as cover, it would still need to use a smaller force to maintain the deception that it was planning an exercise, not an invasion. As Russia learned in 2022, ahead of its attack on Ukraine, large-scale military preparations are difficult to hide. Chinese planners could not be sure that China's communications networks had not been penetrated by Taiwanese or American intelligence services, as were Russia's. Even if communications were secure, the movement of major forces, logistic preparations, and measures such as clearing airspace and establishing security zones would be detectable. Intelligence analysts can distinguish peacetime force buildups from invasion preparations. A few days of warning would provide plenty of time for the Taiwanese armed forces to move troops and set obstacles on the beaches and landing fields it has long been preparing to defend. The United States, too, would have more than enough notice to arm and deploy its substantial naval and air forces in the region and strengthen the defenses of its bases before the invasion could begin.

Once the attack got underway, China would face additional disadvantages. A surprise attack would forfeit the option of a preinvasion campaign to establish air and sea superiority and to degrade coastal defenses. The invasion force would therefore need to fight its way across the Taiwan Strait, and whatever forces landed would face dug-in and well-supplied defenses at their full strength. Most preparations for follow-on attack waves would

also need to be delayed until the first attack was launched. This means that the assembly and loading of units for later attacks would be slower and conducted under fire. In amphibious and airborne operations, the first attack simply establishes a beachhead. It is the subsequent reinforcements that break out to secure territory, including ports and airfields, and then to defeat counterattacking forces and occupy the area. Anything that reduces the speed or size of follow-on forces jeopardizes the success of the invasion. Ultimately, China would have no guarantee that the element of surprise would give its smaller and more slowly mobilized forces enough of an advantage to take Taiwan.

LOSING GROUND

The military balance is only growing less favorable to China, further diminishing the prospect of a successful military operation against Taiwan. The United States is gaining combat experience and developing and deploying new generations of maritime, air, and weapons systems that take advantage of PLA vulnerabilities. Taiwan is making improvements in its defenses, inspired by Ukraine's resistance to Russia's invasion. Japan and the Philippines are stepping up their own security measures in response to Chinese aggression.

The war with Iran has demonstrated several of Washington's advantages. U.S. Navy battle groups were operating within range of Iranian missiles, and both China and Russia were attempting to track American ships and pass the information to Iran, yet in the nearly six weeks of fighting before the April 8 cease-fire, no long-range missile struck an American ship. Beijing must now be wondering how effective its own missile systems would be against American warships. American military commanders and forces have also gained further experience in conducting complex, long-range air and maritime attacks; many Chinese senior commanders, meanwhile, have little operational experience, especially after Chinese leader Xi Jinping's recent purges of military leadership. What is more, contrary to the fears expressed by some analysts, the war with Iran has not cost the United States too many of the precision weapons it would need to defend Taiwan. As of this writing, U.S. forces have used only a small portion of their antiship missile inventory against Iranian ships, and U.S. submarines fired just a single torpedo. Although they used larger numbers of surface-to-air missiles, an adequate supply to defend Guam and U.S. battle groups remains.

Military trends were favoring Washington before the war in Iran, too. The United States was not idle during the early years of China's buildup. New and more capable fighter jets, airborne command-and-control units, and maritime patrol fleets replaced earlier models. New generations of anti-aircraft missiles and long-range reconnaissance drones were sent to the Pacific. Submarines were deployed to Guam, where U.S. bases have been extended and fortified. More recently, the United States' military buildup has been explicitly designed to take advantage of Chinese vulnerabilities. The shift began around 2016, when the Department of Defense first publicly described China as a serious threat. It accelerated in 2019, when the first Trump administration withdrew from the 1987 Intermediate-Range Nuclear Forces Treaty, allowing the United States to develop missiles that could strike targets in the South China Sea and eastern China from naval ships and from launch sites in Japan and the Philippines.

The Department of Defense has pursued modernization programs that are reversing China's relative military gains. Procurement has reflected the priorities highlighted in the 2018 U.S. National Defense Strategy, which included faster and more effective long-range weapons and missile defense; improved space and cyberspace capabilities; more flexible forward deployment locations and expeditionary bases and better-defended forward bases and logistics supply lines; and ongoing improvement of autonomous vehicles and what is known as C4ISR: command, control, communications, and computers, and intelligence, surveillance, and reconnaissance systems. The U.S. military has rapidly improved its long-range ground attack missile systems, expanded its presence in the Philippines and the Ryukyu Island chain, reinforced its submarine fleet's substantial advantage over China's antisubmarine systems, and developed more resilient space systems, such as jam-resistant GPS III satellites. All these capabilities are specifically designed to counter China's improved military in the event of a conflict over Taiwan.

Recent U.S. investments are also taking advantage of developments in military technology that favor the United States and Taiwan. One is long-range hypersonic missiles. Both China and the United States are deploying these missiles, which cannot be intercepted by current missile defense systems and can strike fixed targets—airfields, command centers, naval bases, radars, space control centers, and weapons. The entire military infrastructure in southeast China that would support an invasion of Taiwan is therefore at risk. Beijing has deployed capable air-defense systems around these locations, but American ground-launched hypersonic missiles already in the Pacific (and air- and sea-based versions that will soon be deployed) can overcome them. The American systems could swiftly neutralize the seven Chinese fortified reefs in the Spratly Islands in the South China Sea or destroy

the piers in ports along the coast of southern China from which Chinese invasion forces would be loaded to invade Taiwan. Even without hypersonic missiles, the United States and Israel neutralized most of Iran's air defenses, which are based on the same Russian technology as China's, in a few hours using electronic, cyber, and direct attacks. The addition of hypersonic missiles to the American attack capability creates an advantage that will persist for at least a decade until new generations of air defenses—which the United States also has a lead in developing—can be deployed.

The geography of a conflict over Taiwan gives the United States an additional advantage. Long-range strikes against moving targets, ashore and at sea, are more difficult than those against fixed targets. Tracking is complicated, and the technology used to guide missiles to their targets is vulnerable to countermeasures. The American ships and mobile ground systems that China would need to neutralize if it were to invade Taiwan are spread across thousands of miles—from Guam to the Ryukyu Islands, from Kyushu to Luzon. The most important Chinese mobile targets that the United States would attack are the few dozen amphibious invasion forces crossing the less than 100-mile-wide Taiwan Strait and maneuvering along a few hundred miles of the Chinese coast opposite Taiwan. This concentration would make American long-range reconnaissance and strike systems far more effective than the Chinese systems trying to cover a much larger area.

Technological trends in ground defense also favor Taiwan. Over the last three years, Ukraine has developed devastating new tactics for defending home territory. Drones have made it suicidal for attacking ground forces to operate in large formations. The determined, innovative, and fast-adapting Ukrainian defenders have held back numerically superior Russian forces. Ukrainian drones have also proved effective in a confined maritime area against surface ships, forcing Russia's Black Sea Fleet back to its base.

Employing methods like Ukraine's, Taiwanese maritime and ground forces would have an advantage defending the island. Chinese amphibious ships that must come close to shore to offload landing craft and helicopters would be extremely vulnerable to drone and short-range missile attacks. Any units of a Chinese assault force that made it ashore would also be vulnerable to Taiwanese drone-equipped defenses reinforced by dug-in and concealed artillery. They would struggle to break out from beachheads to capture Taiwanese cities and ports. Taiwan is preparing to mount a drone-centric defense: its focus is shifting from traditional platforms—ships, aircraft, and tanks—to expanding its arsenal of drones and missiles. In November 2025, the Taiwanese government proposed an eight-year, \$40 billion special defense budget for these weapons. Even if the main opposition party succeeds in reducing the size of this budget, the additional spending and industrial production will still provide the Taiwanese army with a much greater defensive capability than it already has. As Ukraine has demonstrated, a numerically inferior force employing these weapons systems can halt an invader. And as Iran has demonstrated in its closure of the Strait of Hormuz, an inferior military can also keep a larger and more powerful air and maritime force from operating freely near its shore.

Recent moves by Japan and the Philippines are further undercutting China's ability to invade Taiwan successfully. Alarmed by Chinese aggression, Japan's leaders have been strengthening their country's security policies. Prime Minister Sanae Takaichi said late last year that a Chinese military operation against Taiwan would be a "survival-threatening situation" for Japan. Over the past decade, Japan has increased its defense budget, purchased counterstrike weapons with a range that includes eastern China, and deployed air and sea fortifications in the Ryukyu Islands that are strong enough to prevent Chinese air and naval forces from breaking out into the Pacific. Philippine leaders, too, have grown wary of China under the administration of President Ferdinand Marcos, Jr., who was elected in 2022. The Philippines has challenged China's incursions into contested waters in the South China Sea, and in 2022 it authorized upgrades to the military facilities the United States operates on its territory under the two countries' 2014 Enhanced Defense Cooperation Agreement. Washington allocated roughly \$100 million for the projects.

STAY THE COURSE

For at least the next decade, favorable trends in hypersonic weapons, drone systems, electronic warfare, and cyberwarfare put the United States and its allies and partners in a strong position to deter China from an attack on Taiwan. China would need much greater military expenditures to overcome these advantages. Yet these positive trends are not self-sustaining. The technology of warfare does not stand still, and maintaining deterrence will require investment in innovation, particularly in space operations and artificial intelligence systems. Taiwan, the United States, Japan, and the Philippines must continue to commit resources, engage in effective military planning and exercises, and respond to China's aggressive actions. When China fortifies another reef in the South China Sea, the United States must deploy more hypersonic missiles to the Philippines' Palawan Island. When China closes air and sea space around Taiwan for weapons demonstrations, the United States, Japan, and

the Philippines must counter with their own live-fire exercises. When China protests the passage of American naval ships through the Taiwan Strait, the United States must send more ships through.

As long as Taiwan and its defenders stay on their current paths, the gap between China's aspirations and its ability to realize them will only increase in the coming years. Beijing's public rhetoric will continue to highlight its determination to accomplish the historic mission of taking Taiwan, but Chinese leaders will recognize that conquering Taiwan is unrealistic in the near term. They will understand that it is dangerous to base the government's legitimacy on a goal it cannot achieve. There will still be competition between authoritarian China, with its state-directed economy and aggressive mercantilism, and the democratic United States, Japan, Philippines, and Taiwan, as well as their other allies and partners, with their market-based economies and commitment to the international economic system. But it will be a primarily economic and ideological contest, not a military one.

Keeping the competition stable and peaceful requires that both Beijing and Washington change the way they perceive and talk about the military balance. China must acknowledge the high risks and low probability of success of an attack on Taiwan, and tone down its nationalistic boasts of military prowess and exaggerated claims of American weakness. The United States must continue to devote attention and resources to maintaining its military edge and display confidence in its abilities rather than give credence to alarmist and hyperbolic warnings of imminent defeat. If all sides recognize the military reality, they can avoid outright conflict—and even preserve the possibility of cooperation that benefits them all.

[The Mirage of China's Military Edge by Dennis Blair](#)

With relevance to immediate events, Hoover's Tad and Dianne Taube Director [Condoleezza Rice](#) provides clear guidance for an [Iran policy](#) that has been in constant flux. Contrary to the image put forth by Islamic Revolutionary Guard Corps officials and the new cadre of negotiators for Tehran, the Iranian military, economy, and nuclear programs are all floundering as a result of American and Israeli actions: "Iran is far weaker today than it was in February." Additionally, the author asserts that Israel and the United States enjoy greater security in the region as Arab allies have made a clear choice to side with them. Her call to our European partners is straightforward: "Iran isn't only our problem." As for Washington, the former secretary of state encourages "strategic patience" and the resolve to accept no deal rather than a bad deal. Ultimately, "no American president has had a better chance to build a different and more stable region." And the consequences for American security are profound.

Deep Blue Sea from Hoover

Admiral [Gary Roughead](#), Hoover's Robert and Marion Oster Distinguished Military Fellow, writes about the importance of the Eurasia landmass and, in particular, the significance of its [southern maritime rim](#) with its four vital choke points. "It should not be seen in its piecemeal parts of West Asia, the Middle East, South Asia, Southeast Asia, and East Asia. This vast maritime region is on the cusp of emerging as a massive blue economy." This blue economy encompasses commerce, trade, shipbuilding, gas and oil exploration, mining—collectively worth trillions of dollars. And US-India cooperation in this "mega-region" is key. As the author concludes, "Who leads in shaping the mega-region will be strategically advantaged, and that leadership will determine the economic and security trajectory of Eurasia for decades to come."

<https://www.reuters.com/world/europe/russian-hawks-urge-putin-escalate-war-drop-us-talks-ukraine-strikes-deep-2026-06-26/>

About the ICBM EAR

Peter Huessy's ICBM EAR Report was originally prepared for the USAF in 1981 to help inform US nuclear deterrent policy professionals at the height of the Cold War. Eventually it was provided only to key elements of the Nuclear related Aerospace Industry. The objective: help build an informed political community on nuclear deterrent issues, especially the deployment of the US nuclear deterrent, especially the MX (Peacekeeper) missile. The report covered developments in the nuclear arena on a weekly basis, including developments in Congress, key events, threat assessments, remarks of top US officials, international activity key to US security interests, nuclear budget and program element issues, and arms control and proliferation matters as well.

Weekly ICBM EAR Report

Prepared by Peter Huessy

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