Weekly ICBM EAR Report



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

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ICBM EAR Week of October 26th

Prepared by Peter Huessy, President of GeoStrategic Analysis, Senior Fellow at the National Institute for Deterrence Studies and the Gold Institute for International Strategy, as well as a weekly guest on the John Batchelor Show

New Analysis on The Window of Vulnerability

Kyl Balzer of the AEI asserts that the US has historically over-estimated the threat from our nuclear armed adversaries, including estimates made in the 1970's by then former Governor of California Ronald Reagan and organizations such as the Committee on the Present Danger. At issue was what was termed the Window of Vulnerability, which was the projected fear that the USSR deployment of what were termed heavy (multiple warhead) and highly accurate ICBMS, alert nearly 100% of the time, could unleash such a deadly attack on the US nuclear forces as to seriously undermine US retaliatory deterrence. Here are some facts: the USSR deployed 360 SS19 ICBMS by 1984 each with 6 warheads or about 2180 warheads. And that 308 SS18s were deployed each with 10 warheads or a total of roughly 3080 warheads also by 1984 but beginning deployment in 1979. The sources I have seen generally put the initial accuracy of both missiles with a CEP (circular error of probability) of 500-550 meters but improving to a CEP of 220-260 meters as early as 1979. Interestingly, the Committee on the Present Danger in 1976 concluded that the SS18 would have a CEP of between 500-900 meters which actually turned out to be a less accurate estimate than what turned out to be the case. Sources indicate both SS18 and SS19 missiles had an eventual accuracy after multitude mods of missile types of around 200 meters. Balzer does not use any numbers but cites studies in the 1980s that claim the threat analysis from the 70's over-estimated the accuracy of the SS19 although his essay doesn't mention the SS-18. Balzer does agree that the USSR heavy missiles and their current theater systems are used for coercive and blackmail strategies especially given the current imbalance in US vs Russian theater nuclear force levels. The link to the essay is here.



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Commentary and Quotes of the Week

Kim Jong Un: Calls for 'absolute superiority' in drones, essential for modern warfare, at expo featured an apparent new flying-wing drone, suicide drones and a live-fire 600mm rocket launcher test.

USFK Commander General Brunson: "With daily jamming of U.S. forces on Korean Peninsula, industry needs resilient solutions."

Secretary of War Pete Hegseth/ROK Minister of National Defense Kang: The U.S.-ROK Alliance is built on peace through strength—ready forces, decisive capability, and combined lethality that deters aggression. America stands with allies that are serious about their own defense.

USSTRATCOM: "During exercise #GlobalThunder 27, an @AFGlobalStrike bomber integrated with our @RoyalAirForce & @Luftforsvaret #AlliesAndPartners, visibly demonstrating our shared commitment to global security and stability."

Air Force Chief of Staff Gen. Ken Wilsbach: “Fielding ARRW enhances our ability to hold targets at risk anywhere around the world. This hypersonic weapon provides the Joint Force a flexible and rapid response option for highly contested environments.”

International Strategic Developments of Interest

Zhang Xiaogang, Chinese Defense Ministry: China’s nuclear submarine development has followed a path of self-reliance and independent innovation, reflecting a major country’s efforts to forge its own sword. This has provided solid support for responding to a complex external environment and safeguarding national strategic security.

South Korea: North Korea fired around 10 short-range missiles toward the sea off its east coast.

News Sources: Three of Britain’s four nuclear deterrent submarines are out at sea, the first time in five years this has occurred.

Russia’s Generalissimo Suvorov nuclear-powered strategic missile submarine successfully test launched a Bulava intercontinental ballistic missile (ICBM) from a submerged position in the Sea of Okhotsk.

The United States and South Korea: Conducted Iron Mace tabletop exercise to integrate conventional and nuclear capabilities, to strengthen Washington’s extended deterrence against Pyongyang’s nuclear and missile threats and jointly integrate Seoul’s conventional capabilities to support U.S. strategic operations.

Secretary of War Pete Hegseth/Japanese Defense Minister Shinjiro Koizumi: Agreed on the importance of continued strategic alignment to enhance deterrence amid increased military activities by China.

A U.S. B-52 bomber was escorted by British F-35Bs and Norwegian F-35As over the Arctic region during USSTRATCOM’s Global Thunder 27 nuclear readiness exercise.

Administration Strategic Developments of Interest

Pentagon officials have asked several NATO countries over the past several weeks to tone down their rhetoric regarding the threat posed by Russia, saying that some comments by European leaders and officials have undermined security in Europe.

Pentagon orders study of new strategies to defeat hardened targets.

Air Force awarded Lockheed Martin a $694 million contract for the production of AGM-183A Air-Launched Rapid Response Weapon (ARRW) hypersonic missiles, for the B-52 and B-1 bombers.

Update on the Ukraine-Russia War

A study published by The Economist estimates Russian military casualties at between 1.4 million and 2.1 million killed and wounded, with fatalities ranging from 374,000 to 770,000. In comparison, tracking site UALosses records 116,000 Ukrainian soldiers killed and 106,000 missing. The study notes that Ukrainian forces recaptured 73 square kilometers of territory over the last three months, erasing half of Russia’s 2026 land gains, while ACLED recorded 290 Russian strikes on civilian infrastructure killing 62 non-combatants in the month to Oct. 23.

ICBM EAR Essay of the Week

Is It Déjà vu All Over Again: The 2012 Report on Global Zero

A Commission report was completed in February 2012 on moving to global zero for US nuclear weapons. It was chaired by former Senator Chuck Hagel from Nebraska who became Secretary of Defense in 2013. This was two years after the 2010 New START treaty reduced US warheads deployed for strategic forces to 1550, although special treaty rules allowed a warhead count closer to 2000. A review of that report from January 2013 prepared by the RSC of the Senate notes: "The Global Zero organization was created in 2008, and proposed a 75% reduction in US nuclear weapons," [or roughly leaving the US at the 500,warhead level]. Perhaps it is not coincidental, but an October 2025 bill by Senators Warren, Sanders and Markey proposed the US unilaterally act to keep only 150 Minuteman missiles (150 warheads) and as few as 4 submarines with an estimated 300 warheads, (4 subs each with 16 missiles, each carrying 5-6 warheads), implying a total strategic nuclear force of roughly 500 warheads as well. Perhaps reflecting this idea, one current candidate for Senate called for all $200 billion in nuclear weapons spending to be cut annually from the defense budget, although total strategic nuclear DoW and NNSA related spending is roughly $60 billion.

The 2013 Senate report continued: "According to its web site, the Global Zero movement advocates the elimination of nuclear weapons. In furtherance of that goal, Senator Hagel and others issued a report last year for this organization proposing a U.S. nuclear force posture and policy for the 21st century. This past Monday, co-authors of that report issued a press release purporting to set "the record straight on Chuck Hagel's global zero position on nuclear weapons." Of critical importance, the Commission report characterized itself as "**not unilateralist."** The RSC explains further the Commission post-report press release goes on to say the authors only support bilateral, negotiated, verifiable U.S.-Russian arms reductions, to be followed by multilateral negotiations, as it recommends a 75 percent reduction in the number of deployed nuclear warheads. But page 1 of the Global Zero report itself reads as follows: "These steps could be taken with Russia in unison through reciprocal presidential directives, negotiated in another round of bilateral arms reduction talks, or implemented unilaterally." The report also reads: 'The reductions and de-alerting proposed under this illustrative plan could be carried out in unison by the United States and Russia through reciprocal presidential directives, negotiated in another round of bilateral arms reduction talks, or implemented unilaterally."

The RSC report further explains that while acknowledging that unilateral implementation is a 'less good approach,' page 18 of the report says 'a strong case' could be made for 'unilateral deep U.S. cuts.' The Global Zero report therefore by its own terms is unilateralist, recommending that one potential course of action for massive U.S. nuclear reductions is that they be completed unilaterally. More concerning, from the Senate's point of view, was that the Global Zero report recommends as another course of action wholly ignoring the Senate in arms control agreements with Russia, saying nuclear reductions could be "carried out in unison by the United States and Russia through reciprocal presidential directives." Secretary of Defense Panetta, on the other hand, took the correct position that arms reductions would take place in the Obama Administration only as a result of an arms control treaty process. He said, "reductions that have been made, at least in this Administration, have only been made as part of the START process and not outside of that process; and I would expect that that would be the same in the future." This makes sense, as nuclear reductions are almost always completed by treaty. [The 1972 SALT I nuclear deal with the USSR was an executive agreement without Senate confirmation but it was an agreement confirming an arms buildup.] As the Congressional Research Service has observed, "[a]rms control treaties are the only category of agreement in the political-military field that have been concluded primarily in treaty form." The Global Zero Commission recommended the United States implement nuclear reductions via presidential directive as opposed to the current Obama Administration position that nuclear reductions will take place only under the treaty-making power of the President articulated in Article Two, Section Two, Clause Two of the Constitution, requiring consent of two-thirds of the Senate.

The press release by the Global Zero report co-authors also goes on to say, "the United States and Russia must lead the way with a bilateral accord for deep reductions." Then the Global Zero report on page 18 says its recommendations of "deep cuts...would strongly validate the Non-Proliferation Treaty and help preserve it in the face of challenges by North Korea, Iran and other prospective proliferators." However, the RSC analysis explains that while the United States has been reducing its nuclear arsenal for the past 40 years, the recommendations of the Global Zero report would benefit only the proliferators. In the past 40 years, the RSC notes while the US has been setting the example of reducing our nuclear arsenal, China, North Korea, Pakistan, and India have done nothing but expand and modernize their nuclear arsenals. There is little empirical evidence in support of the proposition that any of these countries will cut their nuclear arsenals as we [the US] cut our arsenal, like we have been for the past 40 years. Finally, the press release by the Global Zero report co-authors goes on to say the current alert posture of U.S. nuclear weapons "poorly serves our security needs." The U.S. Strategic Posture

Commission, on the other hand, made the following analysis in evaluating “de-alerting” recommendations: “The alert postures of both countries is highly stable.”

Not content to just unilaterally cut our nuclear deterrent, the Global Zero report also called for major restraints on US missile defenses. The report says on pages 12 and 17 that a bilateral accord with Russia to constrain U.S. missile defenses would “reassure Russia that its strategic missile force would not be put in jeopardy” by the U.S. system. The report goes on to observe Russia has sought a formal guarantee that our missile defenses will not be aimed at Russia and will not undermine Russia’s strategic deterrent forces, and the Global Zero report concludes that since the US has not acquiesced to this Russian demand, the arms control process has stalled. However, as the RSC assessment makes clear, the U.S. missile defense system is not directed at Russia’s strategic deterrent. For example, during consideration of New START, an Obama Administration official told Congress, “we have discussed with Russia why we believe our missile defense efforts…are not a threat to Russia’s strategic deterrent.” The head of the Missile Defense Agency said that agency is not “attempt[Ing] to develop a system to defend” against the Russian nuclear posture. Indeed, the Obama Administration’s own Ballistic Missile Defense Review Report says the Russian nuclear capability is “not the focus of U.S. BMD,” and that the U.S. system “does not have the capacity to cope with large scale Russian or Chinese missile attacks and is not intended to affect the strategic balance with those countries.” The Obama Administration in that report also articulates the clear position that it “will continue to reject any negotiated restraints on U.S. ballistic missile defenses.” The distinction is important. Defenses such as Golden Dome seek to provide heightened strategic stability, by making any pre-emptive disarming seeking attack on the United States and its allies as impossible to succeed. During the 1970-1990 period, the USSR sought just such a capability, opening a window of vulnerability that President Reagan eventually closed with his three part (1) peace through strength, (2) strategic nuclear modernization and missile defense and (3) economic warfare campaign. In short, US administrations have generally supported missile defenses as a means of so complicating offensive designs of our adversaries as to make such plans unworkable. As former defense official Paul Nitze once explained, I want the Russian Generals to get up in the morning, review the strategic balance and the US forces, and always conclude: “Not today, Comrade.”

The John Batchelor Show

On the John Batchelor Show the ICBM EAR laid out an analysis of the abolition debate

(Broadcast October 30th, 2026)

1. Abolition now has no takers. Reagan in 1986 pushed for a ban on fast flyers/but rest of world not bought in such as India, Pakistan and China

2. Nuclear Non-Proliferation Treaty (NPT) does not require abolition of nuclear weapons first as US would not try and deter USSR, with a massive conventional superiority, without nuclear umbrella and extended deterrent. Abolition in NPT was only in the context of “general and complete disarmament.”

3. In absence of compelling case for abolition, abolitionists are trashing nuclear deterrence itself, from Oppenheimer, to Dynamite, to Annie Jacobsen’s Nuclear War, to Godzilla Minus Zero, & Brink of War.

4. The thesis is that any retaliation using nuke weapons in response to the initial use of nuclear weapons will result in the all-out use of nuclear weapons between 2 nuclear armed adversaries and thus suicide for both countries. So do not respond with nuclear weapons as a retaliatory policy.

5. Nuclear Deterrence would thus be a bluff. Makes the use of nuclear weapons by the other guy more likely as they have no fear of a retaliatory nuclear strike.

6. Extended deterrence is vitiated. Thus Germany, Finland, Poland, ROK and Japan think they need their own nuclear weapons or host other nation’s nuclear weapons. That spurs proliferation.

7. Why not just use conventional forces vs nuclear armed adversary?

8. Military regularly does exercises testing that thesis. Result 100% of the time: “Nothing Holds”, meaning our conventional superiority fails to hold the line and secure US objectives, “we lose.”

9. US military has testified before Congress on this and all have used exactly that phrase---“nothing holds” when asked what happens in a conventional conflict when adversaries use nuclear weapons.

10. Finland says they will now militarily work with nuclear armed NATO parties, change in their laws. Latvia follows suit. Potential to spur proliferation.

11. Summary:

    A. Failing to get support for abolition, opposition to nuke mods esp. theater systems to strengthen extended deterrence led to alternative calls for rejecting nuclear deterrence, don’t build or strengthen such deterrent, becomes a bluff.

    B. That strategy results in nuke war being more likely and proliferation expanding.

ICBM EAR Analysis

An Ambassador Kirkpatrick Echo

It’s Always the Fault of the US and Its Allies

Commentary on the Eric Heginbotham (MIT) Essay

(1) Japan could deploy US nuclear forces and this would strengthen deterrence. (Thx!)

(2) But it wouldn’t do any good because China has a quest to have good military options re Taiwan and would build more nuclear weapons. (So well, no thx!)

(3) While China is markedly increasing its nuclear force, the analyst misses completely that while the US is modernizing its deterrent, it does so because it is replacing an aging, legacy deterrent that will relatively soon be obsolete, and is NOT increasing its overall nuclear force with additional deployed forces.

(4) Thus, the conjecture that the US is engaging in an arms race with China is incorrect.

(5) China is racing to nearly triple its force (600 to 1500) and Russia is deploying numbers higher than allowed by New START (which Russia pledged to maintain) or current US deployed forces.

(6) So far, the US has not indicated it will deploy more nuclear warheads than the New START levels although it is perfectly capable of simply adding warheads to its D5 and MMIII missiles up to the 2900-3100 warhead level vs the current strategic missile warhead level of 1550.

(7) By the early 1930’s, the US is projected to deploy some number of SLCM-N—cruise missiles aboard submarines.

“In the short term, positioning nuclear weapons in Japan could strengthen deterrence by signaling that the United States might be prepared to engage in limited nuclear operations in East Asia,” Eric Heginbotham, a principal research scientist at the Massachusetts Institute of Technology’s Security Studies Program and co-director of its Wargaming Lab, told the DCNF. “These would necessarily be so-called tactical nuclear weapons. But China will

not give us its quest to maintain or strengthen its military options vis-à-vis Taiwan, so this will not be the end of the story."

"China is already greatly expanding its nuclear arsenal, and the United States is also poised to dramatically increase spending on nuclear modernization," Heginbotham told the DCNF. [Spending is not the same as expanding.) "Hence, a nuclear arms race of sorts is already underway. Placing nuclear weapons in Japan, however, would still have an effect, most likely in further incentivizing China both to increase the readiness of its nuclear forces and to deploy a wider range of "tactical" nuclear weapons that would give it more flexible options." (China does bad stuff but only because the US and its allies forces it to do so."

Nuclear Weapons and Strategic Security in South Asia



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Elections: International

Election Straws in the Wind:

British Columbia voted for a conservative government for the first time since 1928

France's Marie LePen 37% and rising and is expected to win the election next Spring.

Argentina, Bolivia, Chile, Honduras, Peru, Columbia, Costa Rica, all elected conservative governments in the recent past. Venezuela working to hold new elections. Brazil re-elected Lulu by 52%-48% although his opponent got more votes in the preliminary round.

Essays of Interest

The Excellent, Good, Bad, & Worse

Good:

Washington Times Online, Oct. 27 | Jed Babbin "Iran has been making a lot of threats, including, according to our intelligence agencies, planned attacks on American installations, bases, embassies and individuals. How real are these threats, and how seriously should we take them?" Are Iran's threats real? Trump must obtain his goal to remove Iran's ability to obtain nuclear weapons

Bad:

No, the US Doesn't Need More Nuclear Weapons
Inkstick.com, Oct. 28 | Benjamin Giltner New START ends. China grows its nuclear arsenal. Russia issues more nuclear threats. US President Donald Trump's administration seeks the buildup of America's nuclear arsenal. Each of these events seems to make a nuclear arms race inevitable, forcing the United States to invest billions of dollars toward nuclear weapons to keep pace. But nothing is truly inevitable, and arms races are no exception. US policymakers are perfectly capable of taking action to avoid building up America's nuclear arsenal. The country's security and well-being don't need it. In fact, most people support the deterrent effect of nuclear

weapons and their eventual disarmament. This view seems nonsensical. But it is, indeed, sensible. [The author doesn't distinguish between modernization and increasing the size of the US arsenal. During the 1981-93 era, the US underwent "Build-down"---build a new force but markedly reduce its size.]

Worse/Terrible:
Dismantle, weaponize, or rebuild: Why the Iran nuclear threat isn't going away

By Sina Azodi | Analysis | October 29, 2026

In November 2025, Iran now faces one of the most consequential nuclear decisions. In less than a year, the United States twice used military force to destroy key infrastructure and prevent Tehran from acquiring a nuclear weapon. These strikes have set Iran's nuclear program back by severely degrading its nuclear enrichment capacity. But they have not eliminated the scientific expertise, industrial capacity, and political motivations that sustained the program for decades. Still, the attacks exposed the weakness of Iran's previous strategy, which thought that by advancing its program but remaining below the nuclear threshold, Tehran was effectively deterring attacks from its adversaries. It failed.

Tehran now must choose between three main broad options: Dismantle its nuclear program, weaponize it, or rebuild its latent nuclear capacity while still being under the nuclear threshold. Despite its evident failure to deter foreign adversaries, the third path remains the most plausible. Dismantlement would require Iran to abandon three decades of technological investment in exchange for uncertain external guarantees of nuclear fuel delivery. Weaponization, meanwhile, would invite further military strikes and trigger a nuclear arms race in the Middle East. In contrast, rebuilding a latent capacity is already a tested strategy for Iran, allowing it to preserve its technological autonomy and leverage while avoiding immediate costs of acquiring a nuclear arsenal.

Dismantling. The first—and least likely—option resembles the so-called Libya model. Under that arrangement, Libya agreed to dismantle key elements of its nuclear infrastructure and transfer sensitive enrichment equipment abroad in return for sanctions relief and improved relations with the West. Applied to Iran, such a scenario would require Tehran to dismantle its enrichment facilities and renounce domestic uranium enrichment in exchange for sweeping sanctions relief, trade, access to civilian nuclear reactors, and guaranteed supplies of nuclear fuel from abroad.

At first glance, this scenario appears attractive: It would reconnect Iran to the international economy, including for its civilian nuclear infrastructure. And it would also address Washington's central proliferation concern by sharply reducing Iran's capacity to produce fissile material for a nuclear weapon. In practice, however, several reasons explain why Tehran would have extreme difficulty accepting the full dismantlement of its enrichment capacity.

First, the Iranian leadership has long viewed the Libyan case not as a successful model but a cautionary tale of the West's broader goal for regime change. In a 2011 sermon, Iran's late supreme leader Ayatollah Ali Khamenei strongly criticized Muammar Gaddafi for dismantling Libya's nuclear program, noting that he "collected all his nuclear equipment on the heels of empty threats, loaded it onto a ship and handed it over to the Westerners, saying to them: 'Take it!' Then they decided to attack Libya and take their oil." For Iran's leadership, the lesson was clear: Dismantlement did not produce lasting security; on the contrary, it left Libya more vulnerable once its bargaining leverage had disappeared.

This concern is reinforced by a broader and deeply rooted skepticism in Tehran about the credibility of US commitments and external guarantees. In February 2010, for example, Ali Akbar Salehi, then head of the Atomic Energy Organization of Iran—the main government agency responsible for overseeing and operating Iran's civil and defense-related nuclear infrastructure—advised President Mahmoud Ahmadinejad that Iran should begin enriching uranium to 20 percent to produce fuel for the US-supplied 5-megawatt-thermal Tehran Research Reactor in northern Tehran. Salehi warned that Iran could not assume that other countries would sustainably supply the necessary fuel and argued that allowing the reactor to run out of fuel would be an "embarrassment" for the country. Maintaining an indigenous enrichment capability has therefore been viewed not only as a technological achievement for Iran, but also as a hedge against dependence on foreign supply.

The experience of the Joint Comprehensive Plan of Action (JCPOA; or Iran nuclear deal) further strengthens this perception. When Iran and the United States signed the agreement in 2015, many in Tehran, including Khamenei, remained skeptical that Washington would uphold its commitments under the nuclear agreement. When the first Trump administration withdrew from the Iran nuclear deal, opponents of the agreement were vindicated. From Tehran's perspective, the episode demonstrated that even a negotiated agreement endorsed by a sitting US administration could be reversed by its successor. From this recent history, it seems very unlikely that Iran would accept dismantling its enrichment program in return for the promise of sanctions relief or nuclear fuel for its nuclear program.

Weaponizing. In a second and less likely scenario, Iranian leaders may conclude that the country has already absorbed the costs associated with approaching the nuclear threshold—sanctions, sabotage, diplomatic isolation,

and two wars—without obtaining the deterrent protection of possessing an actual nuclear weapon. From this perspective, continuing to remain just short of the bomb could appear unsustainable and weaponization the only option to restore deterrence. While Tehran might attempt to rapidly produce a nuclear weapon using its remaining nuclear materials, acquiring a single device would not necessarily translate into a credible nuclear deterrent. Therefore, while the weaponization and rebuilding options are not mutually exclusive, their distinction lies in Tehran's main objective.

Ever since the October 7 attacks against Israel, and the deterioration of the strategic environment in the region, public calls for revising Tehran's nuclear doctrine have intensified. A year later, in October 2024, as Iran and Israel had a second round of missile and drone exchanges, 39 Iranian lawmakers publicly urged Ayatollah Khamenei to permit a revision in the country's defense doctrine. Public opinion also appeared to shift toward weaponization. A survey conducted between February and May of 2024 found that more than 69 percent of Iranian respondents supported their country pursuing nuclear weapons. By August 2025, that figure had risen to 73 percent. The new Iranian leadership may now conclude that a nuclear deterrent is necessary to deter foreign aggression in the future.

A breakout decision would be a high-risk, high-reward path for Tehran.

In practice, if Tehran recovers its 60-percent enriched uranium, the destruction of its enrichment infrastructure would not necessarily eliminate the possibility of a future nuclear test. The stockpile could still hold enough fissile material for a crude device, although Iran would still have to process the highly enriched uranium into a weapons-usable form, assemble a functioning explosive package, and prepare an underground test site. A nuclear test would generate political shockwaves throughout the region.

But the weaponization scenario would also risk triggering a nuclear arms race in the Middle East. Saudi officials have repeatedly threatened to acquire their own nuclear weapons if Iran develops a bomb. This would put Iran into a nuclear arms race with Saudi Arabia and Israel, both of which have superior conventional firepower, better financial resources, and stronger military alliances.

Rebuilding. The third, and most likely, scenario is a return to pre-June 2025 threshold status, in which Iran reconstructs its nuclear capacity but refrains from crossing the finish line. Publicly available information indicates that Iran is rapidly rebuilding its pre-war nuclear infrastructure and working to finish a more fortified enrichment facility at Pickaxe Mountain. Rather than abandoning enrichment or rushing toward the bomb, Tehran could seek to restore a latent nuclear capability while making the program more resilient to future attack. Rebuilding the program may not represent a credible means of restoring deterrence, but an effort to preserve Iran's nuclear options while avoiding the other alternatives.

The threshold status offers Iran a compromise between two unattractive alternatives. Dismantlement would mean surrendering a decades-long national nuclear enterprise, in exchange for sanctions relief and external guarantees that the Iranian leadership views as inherently unreliable. This scenario would also carry substantial symbolic costs. Internationally, it could be portrayed as a capitulation under military threats. Domestically, it could look like a humiliating abandonment of a program that successive Iranian governments have defended as a sovereign right and the symbol of Iran's modernization.

The weaponization path, too, carries the risk of renewed military confrontations, further diplomatic isolation, and a proliferation cascade in the region. But the threshold path would provide Iran with greater room for diplomacy.

By remaining within the Nuclear Non-Proliferation Treaty (NPT) and accepting robust international inspections, Tehran could negotiate limits to its nuclear program, stockpile, and inspections in return for verifiable sanctions relief, trade, and foreign investment. That flexibility could prove especially valuable after the enormous damage that the sanctions and the two recent wars have done to the Iranian economy. Early estimates have placed the cost to Iran's economy as high as $270 billion. With reconstruction likely to require substantial capital, Tehran will have strong incentives to seek sanctions relief and renewed access to international markets. A threshold strategy would not only allow Iran to retain its nuclear leverage, but also to use negotiated constraints on the program to secure the economic resources badly needed for recovery.

Moment of truth. The recent war with the United States and Israel produced mixed lessons for Tehran. Iran's threshold status failed to prevent military attack. But nuclear weapons themselves played little to no role in the conflict, and there is no public evidence that either the United States or Israel threatened nuclear use despite some concerning rhetoric about destroying Iranian civilization. For a large part, Tehran was able to retaliate using large barrages of conventionally armed ballistic missiles, drones, and other capabilities developed domestically.

Iranian strategists could therefore reach a different conclusion than advocates of weaponization. Rather than cross the nuclear threshold and enter the unknown, Iran may be better served by preserving a latent nuclear capability while investing in more survivable and effective conventional forces, particularly ballistic missiles and drones that played a central role in Iran's wartime response.

The destruction of Iran's nuclear facilities may have bought time for Washington, but military force alone cannot resolve the Iranian nuclear challenge. If the United States is to prevent an Iranian nuclear arsenal, the central policy challenge is therefore to alter the incentives surrounding that choice. Any durable agreement would need to combine verifiable limits on enrichment and uranium stockpiles with robust inspections and tangible economic benefits for permanent restraint, while preserving substantial costs for a move toward weaponization. Without such an arrangement, repeated military strikes may delay Iran's program without resolving the calculation that sustains it and could ultimately strengthen the argument inside Iran's political system that only nuclear weapons can provide lasting security.

[**Editor's Note: Iran chooses the option to maintain a readiness to build nuclear weapons as an ongoing threat to prevent the West, including the US and Israel, from fully preventing Iran from engaging in terrorism and spreading Islamic jihad. A latent nuclear capability gives Iran a sanctuary from attack and prevents the elimination of the regime. Preserves Iranian revolutionary status as a threat to the entire Middle East. Preserving Iran's nuclear options means preserving Iran's option of going nuclear---which is actually a requirement to implement the end of times and the return of the Mahdi. Not an option but a requirement. Only issue is when Iran decides to implement such an option. It is not a matter of national pride or "right to enrich. Its preserving the right to implement "Death to Israel and Death to America.]**

Excellent: Hello, this is Victor Davis Hanson for the Daily Signal.

There's a lot of acrimony right now about a planned summit with the three most powerful leaders, at least in terms of nuclear weapons and military: Vladimir Putin, President Xi Jinping of China, and Donald Trump. And the West is furious right now because they are accusing Donald Trump of selling out Ukraine because he said some negative things about them, the Ukrainian war. And they feel that the Europeans are shut out and the American Congress is shut out, and Trump will deal away Ukrainian sovereignty. But why are they meeting? Why does Trump want to? What's he want to get out of this? The obvious thing is he's mentioned it so much before that he would like to be a triangulator. He would like to tell Putin, "I don't want you to be friendlier to China than you are to us." He wants to tell Xi, "I don't want you to consider us a greater enemy than you consider Putin. We want all three to balance each other out." Where does he get this? It's traditional Henry Kissinger triangulation. There's a second reason that Trump wants to meet. During this lull in the Iranian war, it's pretty clear that we have not hit facilities on the Caspian Sea, nor have we stopped all the highway and rail links by land out of Iran that find their way into Russian provinces, former Soviet provinces, and eventually Russia. And Iran is getting some materials. Trump wants to say to Putin, "I would like to negotiate the United States' role with Ukraine if you will stop all of that, and we can finish." The last thing Donald Trump wants is two wars at the same time. Three, of course, he wants cheap oil prices. Right now, 24 million barrels are going out of the Gulf. That is at the same level, if not a little greater than before the war. But gas prices haven't yet felt that decline or that open Hormuz. They haven't seen it because of refineries. And the Ukrainians are hitting refineries in Russia. And we don't have enough refineries due to our regulatory and green mania of the last two decades. So, the problem is not going to be oil, it's refineries. And Trump wants to talk to Putin and say, "Let's finish the war and let us—we will stop the Ukrainians from hitting your refineries, and we'll take the sanctions off, and the price of gas and oil will drop, and the world economy will flourish." Now, the Ukrainians are scared stiff, and they are thinking that he's going to give Putin everything. He's not. From what has leaked out, it is what we call uti possidetis, as you possess it. It's a formula for the status before the war. In other words, before the war, there was a sovereign Ukraine and there was aggressive Russia. You're not going to change that. But as you possess it also means that the battle line between the two parties will be the new armistice line. Ukraine, in that 500- or 600-mile corridor, has linked towns, roads, and has a viable defense front. It has to have that, otherwise, the Russians will keep going into Kyiv. Russia has got about 6 to 8 million Russian speakers by annexing Crimea and annexing Eastern Ukraine. There is no way that Ukraine, which has lost 25% to 30% of its population and suffered a devastating loss to its economy, will ever have the wherewithal to take back Crimea or to take back Eastern Ukraine. And you add into that factor that Crimea has traditionally been a part of Russia since the late 1700s. It was only autonomous as an independent country for about three years after the fall of the Berlin Wall and the collapse of the Soviet Union. And Ukraine grabbed it before the Russians could grab it. And Ukraine's eastern part was ceded to Ukraine by Nikita Khrushchev, partly to assuage Ukrainian national liberation sympathies. In other words, cool an independence movement. So, there's a checkered history there. This is very reminiscent, this meeting that will occur, of the Finnish War, the Winter War of 1939. Russia, as aggressive as ever, attacked little Finland, just like Putin attacked Ukraine. And they said they were going to roll over Finland. And the Finns fought completely outnumbered 10 to one. They fought ferociously for the whole fall and into the spring of 1940, just like the Ukrainians. And then they realized they could not defeat this Soviet juggernaut. So, they cut a deal and they said you wanted us to surrender 10% or 15%. We went to war to preserve that. You've got that now. You can take it. However, we will fight you to the death, or we will promise not to attack you and keep to ourselves. The Germans are our allies. Should there ever be a war, we will not join the Germans in attacking you on Russian soil. Gen. [Carl Gustaf Emil] Mannerheim kept his promise, and Finland, for all the jokes about Finlandization during the Cold War, that it was like Austria or Switzerland, kind of a neutral opportunistic nation, it survived. That's a good

model for Ukraine. It can say, “I don’t want to be in NATO. I want to be armed to the teeth. I’ll be the bulwark of Europe on the front lines, but we cannot be openly a part of NATO and openly aggressive to Russia, but we will be in a position to repel Russian aggression.” That’s the outline of a deal that I think they’re going to make. Why else do they want to do it? Besides the Iran war, besides the unrest in the Middle East, and besides the humanitarian consideration that almost nobody on the Left is talking about, probably two and a half million total casualties. This is Stalingrad and the Somme and Verdun combined. This is the worst massacre in Europe since the German invasion of the Soviet Union, and it’s endless. There’s no end in sight. Nobody has come up with a peace plan. Nobody has come up with an end to it. Ukraine has not folded to the Russians’ anger. It won’t fold, and Russians won’t stop. They’re very ironic. As I said, they’re in the reverse Stalingrad position where the German army, remember, couldn’t go forward and beat them, but it wouldn’t go back. It refused to go back and be saved. The Russians will not withdraw, but they can’t advance, and so it’s in everybody’s interest to find an end in humanitarian terms. Finally, there is the question of Taiwan. When you have Russia and Europe and the United States occupied in Ukraine and you have the United States occupied in Iran, China sees an opportunity and they might move on Taiwan. So, it would be better to talk to Russia and Taiwan, especially to Russia, that China going into Taiwan is not in their interest. I know that they’ve lost Syria, they’ve lost Iran, they’ve lost Venezuela, they’ve lost a lot of clients. But the last thing you want to do is have an aggressive ascendant China right next to Russia that’s underpopulated with the largest area in the world and the richest natural resources in the world. So, there’s a lot of self-interest among these three countries. The criticism, to end, is from Europe because Europe feels it’s left out, and Trump is evil, and he’s Putin’s pup. They have absorbed all the propaganda from the first term. But if Europe wanted the United States to be engaged more, and we’ve given somewhere between 100 and 200 billion, depending how you calibrate logistics, reconnaissance, intelligence costs. But if you really want Europe to be engaged in this high-stakes diplomacy, then you might have said to the United States we have to have Russian natural gas. We’re the biggest customer, so I can understand why you also are worried and might buy diesel. They didn’t do that. They blasted Trump. They might have said, “Just as Russia represents an existential threat to Europe, much less to Ukraine, much more to Ukraine, and we wanted you to give weaponry and to intervene and spend a lot of money and support. So too, you were in an existential war with Iran to stop Iranian nuclear missiles pointed at you and us especially. And therefore, we wanted to help you with Iran like you’re helping with Ukraine on our borders.” And what did they do? They said, “Not only are we not going to help you, but you’re also not going to use any of our NATO bases. You’re not going to use any of our airspaces. We’re not even going to provide adequate security for your bombers in the UK, and if they’re the object of an Iranian-inspired terrorist attack, we’re going to let the terrorists out on bail.” That’s what they did. So, you can see why they are left out. And when you add into the equation that they would have never armed themselves to 2% unless this person that they despise forced them to, Donald Trump, for their own interest. And even then, they’re barely reaching the 2%, at least in Western Europe. And so, the reason the Europeans are not there is some of the countries are in total chaos with riots in the streets, Italy, Belgium in some cases, but especially France, Albania. In addition to that, their economies are weak, and they’re anemic, and they were not reciprocal. They said, “We’re buying Russian energy, but you are satanic because you might do the same. We want you to come in as a NATO partner and help us and give aid to Ukraine to stop the common enemy, but we won’t do that for you when you’re trying to stop the common enemy of Iran.” And the result of it is they were ostracized, and they’re losing influence, and they’re furious, and they’re mischaracterizing what is a realpolitik meeting with a leader of the largest democracy in the world with two autocrats. But believe me, the United States, Marco Rubio, and Donald Trump know whom they’re dealing with.

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.

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