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**Special Report: The ICBM Ear has prepared a review of the current strategic nuclear balance today and projected into the next 10-15 years. The Ear wants to thank Franklin Miller, Mike Pillsbury, Christopher Yeaw and Mark Schneider, for their help and guidance on this project, as well as a number of members of the US military. (Pages 1-5)**

**A Nuclear Review Assessment**

**Introduction**

The US is indeed facing two peer adversaries in China and Russia which are projected to have combined some 11,000 nuclear warheads in 2035, some multiple thousands greater than their combined number of warheads today.

A key question is to what extent do nuclear weapon numbers matter? Certainly, they should in any treaty which mandates force levels, although the 1972 SALT I limits on ICBMs and SLBMs were unequal in Russia’s favor. But since 1972 and in the seven strategic nuclear weapons treaties between the United States and the USSR and then Russia, numbers of warheads allowed for each side were the same although deployed differently.

Prior to the first SALT arms deal, in 1965 the US had 6000 strategic warheads vs the USSR at 600. By 1983, after the SALT I/II treaties of 1972 and 1979, respectively, the US had 8900 strategic warheads and the USSR had 7800. And at the time projections were that by 1993, absent arms control [such as the proposed START agreements], the USSR would have between 14,000-23,000 deployed strategic warheads.

Absent new arms control agreements, the 2010 New START agreement expires in February 2026. The future nuclear balance may be very disparate even after the current US nuclear modernization plans are completed. That may have political consequences with the US public, Congress and our allies.\* And may lead our adversaries to miscalculate and take risks threatening US interests.

However, if the United States has sufficient warheads to cover all of the targets of deterrent interest in Russia, China, North Korea (plus a reserve), does it need even more nuclear warheads above that number simply because the Russians and Chinese forces combined are much larger?

The Posture Commission of October 2023 addressed this question and concluded that while the US may need a greater future nuclear deterrent capability, the United States did not necessarily have to match the Chinese and Russian nuclear weapons forces “warhead for warhead” for targeting/deterrent purposes while also concluding (with strong caveats about the future) the US nuclear deterrent was strong today.

**The Current Situation**

Having said that, it is without question the recapitalization of the TRIAD is required. And for a myriad of reasons including these three keys:

- End of life/operational viability of the current nuclear fleet (MM III, B-52H, B-2, Ohio, NAOC)
- Cost of sustaining legacy weapons systems coupled with lack of vendor support
- Operational threats that require modernization—as the operational margin would be insufficient

Recapitalization of the TRIAD does not equate to an arms race, it's absolutely the opposite—the US is the only nation that is executing a rationale, deliberate, and balanced recapitalization of the TRIAD. The US strategic posture and weapons system capability are dictated by what the US is required to hold at risk for deterrence objectives both today and in the future and is not based on an artificial number based on other nations stockpiles.

Every single nuclear modernization program is also required to assess the feasibility and cost of an alternative service life extension on the current weapons systems. When examined, it has been determined to be greater in cost and the capabilities less while facing an ever-increasing threat from China, Russia, North Korea and an aspirational Iran.

The current New Start Treaty expires in Feb 2026 well before any of the current recapitalization programs are operationally fielded, so although they are “compliant” with the existing treaty, it will not be in force when fielded. But it is important to point out that the modernization force would be completely consistent with New Start even if the treaty were still in force.

The last 11 administrations, political party agnostic, have studied the threat and our national security needs and directed our nation maintain a TRIAD. If the country is going to explore other national security needs or whether or not the country can “afford” the nuclear recapitalization, the nation's leaders must also ask whether the nation can “afford” not to do a recap with the subsequent impact to our national security and those of America's allies to whom the American deterrence umbrella is extended. In short, if America does not aggressively pursue the recapitalization of the TRIAD, the country will by default mortgage our standing as a world power.

### **Background**

Before laying out an assessment of the US nuclear enterprise in the context of other nuclear threats, some points need to be made about the US modernization effort, especially about cost and alternatives to modernization and current deterrent strategy.

First, the US modernization effort of acquiring a minimum of (from the 2018 NPR) 12 Columbia class submarines, the requisite number of D-5 missiles, (16 per submarine), the 400 Sentinel ICBMs, and some at least of the 100 nuclear capable B21 “Raider” strategic bombers are entirely consistent with the 2010 New START nuclear arms agreement and US obligations under the Nuclear Non-Proliferation Treaty.

In short, the US modernization effort is consistent with international law and is not in any way engineering or beginning an “arms race.” **It is insulting to the nuclear industry given their heroic work to overcome multiple decades of nuclear neglect to claim their current work is somehow endangering** US security through pursuing some kind of “arms race.”

Second, the cost of the US nuclear modernization is not \$1.2 trillion over thirty years as CBO (the Congressional Budget Office) claimed in their initial 2010 assessment. A very large portion of the cost of the nuclear enterprise is sustaining and operating or otherwise **supporting the legacy US nuclear forces. These forces are aging as they are being kept well** beyond their intended life-cycle. They are also costing significantly more each year to sustain and operate and will at the end of the next decade be required to go out of service due to operational, technological and cost factors that can only be marginally changed.

In fact, as SAC defense subcommittee member Senator John Hoeven explained at a TRIAD conference in September 2024, the research development, test, evaluation and acquisition costs of the new modernized Triad **elements are \$19 billion in FY2026 as approved by the Senate Appropriations Committee.** By comparison, the overall nuclear enterprise in the current fiscal year (FY2025) costs a total of \$52 billion, (including only the portion of the B21 Raider program to be deployed in the nuclear role and not the full planned acquisition of 100 strategic B-

2 bombers all of which are nuclear capable.) To underscore, the \$52 billion total nuclear modernization enterprise consists of one third modernization costs of \$17.4 billion for the new modernized elements of the nuclear TRIAD.

Third, the choice isn't between keeping or extending the life of what we now have, exercising "restraint" and foregoing modernization vs the current modernization program of record.

As Senator Shaheen of New Hampshire has explained, relying on our legacy systems only and not modernizing risks the danger of what Clark Murdock described as "rusting to obsolescence." And the administrator of the National Nuclear Security Administration (NNSA) Dr. Jill Hruby has also pointed out, the \$22 billion NNSA budget (part of the overall \$52 billion referenced earlier) is necessary to sustain the US nuclear warheads without which the US would also have to get out of the nuclear business.

The bottom line is clear: as the former Commander of the US Strategic Command Admiral Charles Richard explained, **the alternative to modernization is not keeping what we have but it means unilaterally disarming and getting out of the nuclear deterrent business. Thus, there are** only two choices. Modernize or disarm.

Fourth, however much some may seek a nuclear weapons free world, there is zero chance any such deal is on the horizon. As North Korea's leader is purported to have told a US official about the idea of global zero being adopted by the DPRK, "Sure, you first." **Therefore, claims that the US nuclear deterrent strategy is immoral, or in the words of best-selling author Annie Jacobson "mad," are dangerous. What would be the current alternative?** If nuclear global zero is not achievable and nuclear deterrence won't work as Jacobson and the New York Times both argue, in her book "Nuclear War: A Scenario" and the Times series "At the Brink," respectively, they both have an obligation to tell us what is the alternative. Like previous nuclear initiatives such as the nuclear freeze, such ideas as "global nuclear zero" have to be tested in the context of the real world.

### *The Nuclear Balance*

#### *The United States*

The US nuclear deterrent consists of those forces currently in the field, as well as those that could be placed in the field in a relatively short period of time, and the overall force that in the much longer term could be fielded by the United States. The New START agreement of 2010 laid out what force could be deployed, but it did not restrict the total available inventory of nuclear warheads the US maintained as a "hedge" in case the assumptions that underpinned the New START agreement might change. **That hedge gives the United States a total of about 3100 strategic long-range nuclear warheads we could deploy over time compared to the near 2000 we could deploy today.**

Currently the US can deploy up to 1090 Ohio class submarine based warheads as allowed by the New START agreement, with some number less than that now being deployed day-to-day. For our ICBM Minuteman force, we have very close to all 400 missiles and their 400 warheads deployed, (actual alert rates are 99.5%). In addition, New START rules allow the United States upward of 60 allowable B2 and B52 strategic bombers, none of which are on-alert on a day to day basis. These bombers can each carry from 8-20 gravity bombs or cruise missiles.

The US now has 14 Ohio class submarines but only 12 are counted as deployed [this is to the US benefit because in previous treaties we were assessed for submarines in overhaul], each with 20 D-5 missiles. The US has 400 Minuteman III missiles, and 60 nuclear strategic bombers. But starting in 2032, the Columbia class submarine and the Sentinel ICBM will gradually replace our legacy systems so that between 2035-42 the US should have fully modernized at least 652 strategic nuclear platforms, consisting of 192 sub missiles, 400 Sentinel ICBMs, and 60 strategic bombers, although some legacy system ICBMs may remain in the force.

Now the US could add 50 ICBM silos still available but not now used. The Sentinel or in the interim the Minuteman III missiles could hold 1-3 warheads and thus increase (an arbitrary guess on my part) the US deployed arsenal by 500 warheads. Similarly, the existing D-5 missile can carry up to 8 warheads and if all 192 missiles aboard 12 Columbia class submarines were uploaded, the US could deploy 1536 SLBM warheads. And with 60 strategic bombers each with a notional 10-12 weapons, the US bombers could be deployed with some 600-720 warheads. All combined, the US could over time deploy an estimated 1536+800+720 warheads, or 3056 warheads, somewhat

short of the warheads available in our nation's stockpile. Some 300 additional warheads are gravity bombs that could be deployed aboard regional/theater capable US and NATO allies' fighter plans based in Europe---none are now currently deployed in the Pacific.

Such a relative balance that is portrayed here should be a catalyst for a renewed urgency for the US nuclear modernization effort, especially improving the quality of the force, in addition to missile defense, cyber and space security and conventional force elements, all of which contributes to the US deterrent capability of the country.

### *Russia*

First Russia no longer abides by the New START agreement. Second, a number of Russian strategically capable systems are not counted against the New START treaty limits. Third, because Russia places so many of its warheads on large, multiple warhead capable missiles, it only deploys roughly 540 what are termed SNDV or Strategic Nuclear Delivery Vehicles although the New START agreement allows 700 SNDVs. That means the Russians could add considerably more such platforms and thus thousands of additional warheads if they wished to do so given the relative size of their arsenal today. Fourth, to fit within the New START limits, Russia is assumed by the US State Department to have [until recently] limited its warheads per missile to a number consistent with the New START agreement, especially as required treaty inspections have been stopped by Moscow as well.

If Russia uploaded with more warheads per its currently deployed long range nuclear systems, the Russian strategic nuclear force would easily exceed 3500 deployed warheads, without having to add any additional land based or sea based missiles than what they have today. Mark Schneider of NIPP and Chris Yeaw of the University of Nebraska both project Russia's strategic nuclear force is headed to 3500-4500 warheads by the middle of the next decade.

### *China*

As for China, the current buildup has been described by retired Admiral Charles Richard as "breathtaking." The current nuclear force is according to US intelligence sources around 600 strategic long range deployed warheads, having grown by at least 100 this past year. The Chinese are building the H-20 stealth bombers, 096 SSBNs or submarines, and the land based missiles including DF-45/51s, all of which are in some stage of development and from 1-2 yrs to 5-6 years to production.

Included in the Chinese force structure are 360 new ICBM silos, along with 150 mobile ICBMs. And under development, 100 new DF-45/51 missiles some of which may be rail mobile plus a long range DF-27 ICBM. In addition, six submarines each with up to 12 JL-2 or JL-3 missiles are in service, with the latter having multiple warheads. Six next generation 096 submarines each with 14 missiles carrying 3-10 warheads will enter service at the end of this decade.

The ICBM silos are capable of holding the DF-31 or DF-41 which each have between 3-10 warheads, respectively. The newer submarines will carry the JL-3 or JL-4 missile, with the capability to carry some 1-4 warheads each. The US Navy Pacific commander says the PRC is currently beginning to deploy the advanced multiple warhead submarine launched ballistic missile the JL-3.

And finally, the PRC has some 150 H-6 and H-6K strategic bombers, each with the capability of deploying 6 and potentially 12 nuclear weapons including cruise missiles.

The current build or acquisition rate of these new systems is 1-2 years in the near term and 4-5 years for the long term. Projected from today's level China will have in 2035 at least 1400 strategic long range nuclear warheads .

### *Theater Nuclear Weapons*

In addition, China and Russia have what are termed theater or regional, short range nuclear weapons. Officially, Russia has 1900 such weapons according to the US intelligence services, while China according to unofficial estimates is estimated to have only a few hundred. According to Yeaw and Schneider, however, Russia could easily have 4000 such theater weapons today. As for China, Yeaw says China today has 578 theater weapons and by 2035 he projects that China will have 2184 such weapons.

Taking this data into account, combined, Russia will have some 7500 theater and strategic warheads by 2035 and China will have some 3500. There are no technological barriers to this projected growth. The PRC is building new production facilities for nuclear weapons grade material, with significant help from Moscow. And the balance reviewed here does not include the current North Korea force, nor what Iran might produce. As for Israeli, French and British forces those are estimated to collectively be around a hundred warheads for each arsenal.

### **Conclusion**

The US faces within the next decade the prospects of two nuclear armed peer adversaries with between a three or five to one advantage in deployed (in the field) nuclear weapons. Between a three and four to one disparity would occur even if the United States implemented a near 50% hedge increase in its own nuclear forces over the next decade.

The US should accelerate and expand the Congressionally mandated Navy nuclear armed regionally capable cruise missile program, which the Congress has put in the budget and the Navy has now determined to support. The number of such submarine based cruise missiles that would be deployed has not been determined but to strengthen regional nuclear deterrence in the NATO and Pacific regions at least several dozens of such weapons is necessary.

The United States should also build more Columbia class submarines as called for by the Strategic Posture Commission but given the limits of our shipyard capacity, that new acquisition which would expand the existing planned buy of 12 boats but might not begin until 2043 unless the US builds a new shipyard. The United States should also assess whether to increase the planned buy of B-21 Raiders up to 200 aircraft and increase the planned buy of LRSO cruise missiles to ensure every B-52 'hook' will have at least one LRSO assigned to it.

### **Commentary and Quotes of the Week**

**General McMaster of Hoover:** "The Iranians understand the new administration and Trump knows the return address of all this as it all goes back to Tehran."

**Andrey Gurulev, a pro-Putin MP and reservist general:** "If today Britain is hitting our territory with its missiles from Ukraine, everyone realises that they will not fly anywhere without NATO control systems and satellite navigation. I believe that this is a direct reason for Britain to simply not be on Earth."

**Michaela Dodge of NIPP:** "Ukraine's cautionary tale of getting invaded after it gave up nuclear weapons will hardly be lost on U.S. allies—and adversaries. If the United States fails to decisively support Ukraine against its righteous fight against the Russian invaders, it will lose the credibility on which U.S. assurance to allies depends. The implications could be far-reaching: from allies geopolitically aligning with U.S. adversaries to developing their own independent nuclear weapon capabilities."

**Secretary of the USAF Frank Kendall:** "The biggest limitation we had over the last four years has been money, and the length of time it takes to get it. Between budget submission delays, continuing resolutions, and other budgetary obstacles, it took ... two and a half years to get money for things we knew we needed to do."

**Secretary of US Air Force Kendall:** "Maintaining a nuclear deterrent is important. But unlike 50 years ago when Kendall was an Army officer stationed in Germany on the frontline of the Cold War, the world is more dangerous today. "The broader issue of nuclear stability keeps me up at night," he said. "It's a different world when China, Russia and the U.S. all have a thousand-plus nuclear weapons in the field. It gets more dangerous as other countries proliferate weapons. It gets more dangerous as people think about using tactical nuclear weapons ... for military objectives."

**Secretary of Defense Nominee Hegseth:** "[I] would focus on "reviving our defense industrial base, reforming the acquisition process (no more 'Valley of Death' for new defense companies), **modernizing our nuclear triad**, ensuring the Pentagon can pass an audit, and rapidly fielding emerging technologies. "

**A South Korean Defense Ministry official:** “Seoul would like to maintain the “stable operation” of the Nuclear Consultative Group and that the ROK plans to continue jointly developing with the United States “the concept of conventional-nuclear integration.”

**Secretary of State Designee Senator Marco Rubio:** “Washington needs to take a “serious” look at North Korea policy to explore how to lower the risk of “inadvertent” on the Korean Peninsula and “without encouraging other nation states to pursue their own nuclear weapons program.”

**Ukrainian President Volodymyr Zelenskiy** signaled the war that has ravaged his country is more likely to end this year because of U.S. President-elect Donald Trump’s sway over Russia.”

**House Speaker Mike Johnson:** “The future of warfare is different... We have to think about it differently and fund it differently. It’s going to be drone warfare, cyberwarfare, all those things involved, but we have to maintain the greatest fighting force on the planet.”

### **Congressional Strategic Developments**

#### **Intelligence Committee Gets New Chair**

By Allison Mollenkamp, CQ News // Jan. 16, 2025 – 3:12 p.m. [congressional quarterly news - Search](#)

**Arkansas Rep. Rick Crawford** will chair the House Select Intelligence Committee, Speaker Mike Johnson announced Thursday, succeeding Ohio Republican Mike Turner. Crawford is the most senior Republican on the panel in the 118th Congress that’s still serving.

The 8th-term lawmaker previously served as chair of the committee’s Central Intelligence Agency Subcommittee. Crawford sought to chair the Transportation and Infrastructure Committee.

**Turner will retain seats** on the House Armed Services and Oversight and Government Reform committees. Johnson named new GOP members to the Intelligence panel, replacing Turner and other Republicans who’ve departed Congress or will leave in the coming weeks for roles in the Trump administration. They are: Ann Wagner of Missouri; Ben Cline of Virginia; Greg Steube of Florida; Claudia Tenney of New York; and Pat Fallon of Texas. Washington

#### **New DOD Spending Planned**

Congressional Republicans, are planning to include a significant defense spending boost in their party-line budget reconciliation bill with an infusion of roughly \$100 billion to \$200 billion to bolster U.S. defense capabilities, keep pace with adversaries like China and fulfill President-elect Donald Trump’s vision of “peace through strength.”

#### **Trump Administration Defense News**

New NNSA Administrator Nominated: <https://www.defensedaily.com/trump-taps-brandon-williams-as-his-nnsa-administrator-nomination/nuclear-modernization/>

<https://www.airandspaceforces.com/trump-nro-meink-air-force-secretary/>

By: [Chris Gordon](#) for Air & Space Forces Mag // Jan. 16, 2025

President-elect Donald Trump has picked **Dr. Troy E. Meink** to become the next Secretary of the Air Force, he announced Jan. 16. Meink is currently the principal deputy director of the National Reconnaissance Office, a Department of Defense intelligence agency that works closely with the Space Force. If confirmed, Meink would be the first Air Force Secretary to come to the job from the NRO in 52 years

But Meink would be unique given how deep his experience is at the intersection of defense and space. While he served in the Air Force as a KC-135 tanker navigator from 1988-1993, he spent much of his career as a civilian

working for the Air Force in [various space roles](#), including as the deputy undersecretary of the Air Force for space. He has been at the NRO for more than four years, having been appointed to his current role under the previous Trump administration.

Before becoming the [NRO's current No. 2 in 2020](#), Meink was the director of Geospatial Intelligence Systems Acquisition (GEOINT) at the agency and responsible for a \$15 billion budget overseeing acquiring satellite systems. Meink's selection may be a significant boost for the Space Force—USSF leaders have said their service needs more resources and manpower to keep up with a growing mission set, as they face their first ever budget cut in 2025.

Beyond that, however, Meink will face major questions during the confirmation process and early in his tenure about how to handle the Air Force's Next-Generation Air Dominance program, Collaborative Combat Aircraft drones, [and the over-budget and behind-schedule Sentinel intercontinental ballistic missile](#). The Department of the Air Force pick had been a [notable hole in Trump's planned national security team](#).

Trump named John Phelan, a businessman donor with an MBA from Harvard, to be Secretary of the Navy and Daniel P. Driscoll, an Army veteran and Yale Law School graduate, to lead the Army. Driscoll has been a senior advisor to fellow Yale Law grad Vice President-elect J.D. Vance. [Stephen Feinberg, financier, is Trump's pick for Deputy Secretary of Defense, and Elbridge "Bridge" Colby has been named to lead the Pentagon's policy shop.](#)

### **Nominated Secretary of Defense Peter Hegseth**

Pete Hegseth, a former Fox News host and Army National Guard officer, is Trump's pick to be the 29th Secretary of Defense. Hegseth had a confirmation hearing in front of the Senate on Jan. 14 and [appears likely to be confirmed](#) despite allegations of personal misconduct and intense criticism from Democrats. "Troy will work with our incredible Secretary of Defense Nominee, Pete Hegseth, to ensure that our Nation's Air Force is the most effective and deadly force in the World, as we secure **PEACE THROUGH STRENGTH**," Trump [wrote in a post on his social media network Truth Social](#).

### **ICBM News**

#### **Take Sentinel Off the Air Force Books? 'Doesn't Create New Money,' Kendall Says**

Air Force leaders say their budgets aren't big enough for all the service needs to do to prepare for great power competition with the likes of China—[and amid this resource-constrained environment, one of the biggest item on the service's books is the new Sentinel intercontinental ballistic missile](#).

But while some advocates have argued in favor of [pulling out Sentinel and nuclear modernization into their own budget account](#) separate from the Air Force, outgoing Secretary [Frank Kendall is lukewarm on the idea, saying it wouldn't really solve any of the services' budgetary problems](#). "You could separate it. You could put it into a separate account. That doesn't make it cheaper," Kendall told Air & Space Forces Magazine. In another interview, he said such an approach "doesn't create new money."

Another persistent issue advocates say complicates perceptions of the Air Force budget is the ["pass-through,"](#) a collection of funds that placed under the Air Force for space and intelligence but that it does not control, instead going to various classified efforts. Kendall said he never attempted to get rid of the "pass-through" for reasons similar to the nuclear modernization account. "The people that do our budgets understand this," he said. "I don't think it's a factor in their thinking about how they allocate resources."

**When the "pass-through" is taken out, the Air Force typically receives fewer resources than the Army and Navy, even though the National Defense Strategy for eight years has said that the Air Force and Navy have a disproportionate burden of preparing for conflict in the Pacific.**

Kendall did praise Congress for approving the Quick Start authorities he requested, so that urgent programs can get underway outside of the normal budgeting process "I'd love to see that expanded so that we don't have to wait quite

so long to do the early, low-cost, but very important work on a new program. That would be a terrific thing to expand. I think I wish I'd had the opportunity to do that," he said. The Quick Start program has a ceiling of \$100 million, which he has previously said is sufficient for the most urgent programs.

Kendall also thinks he succeeded in raising "a growing awareness throughout the department that we have got to be ready for a pure competitor unlike any that we've probably ever seen before, and that that has to be approached with a sense of commitment and urgency across the enterprise. ... I think we've made a lot of progress in that regard, and that's going to carry us forward."

He's not concerned that such focus will be lost under the new administration, "because I think the focus on China as the pacing challenge really was part of the National Security Strategy during the first Trump term. I think it will be a ... central part of the strategy during the second term, just as it was for us in the last four years. So, I think moving the enterprise in that direction overall is probably the most significant thing that I've done."

## **Strategic Thinking: Nuclear Nonproliferation, Nuclear Testing, Nuclear Dangers, China Not US Enemy, and Iran Policy Options for US and Iran Charm Offensive, and More Russian Nuclear Threats**

### **NIPP and Michaela Dodge**

#### **Ukraine & The Risk of Further Undermining U.S. Nonproliferation Policy**

The effectiveness of U.S. deterrence strategies rests on U.S. credibility, and that credibility is already on the line in Ukraine because Washington was one of the signatories to the 1994 Budapest Memorandum guaranteeing Ukraine's sovereignty and territorial integrity in exchange for Ukraine's decision to denuclearize.<sup>[58]</sup> According to some Ukrainian experts, Russia's invasion constitutes "formal grounds for withdrawal from the NPT [Nonproliferation Treaty] and moral reasons for reconsideration of the non-nuclear choice made in early 1994."<sup>[59]</sup>

During the Clinton Administration, the United States spearheaded Ukraine's denuclearization in its effort to prioritize relations with Moscow "*over all else*" and "*ridiculed Ukrainian concerns over their security, even insinuating that U.S. officials knew Ukraine's interests better than the Ukrainians themselves.*"<sup>[60]</sup> Clinton has since expressed regret over pressuring the Ukrainians to give up nuclear weapons on its territory.<sup>[61]</sup> Quite understandably, Ukrainians feel similarly.<sup>[62]</sup> Recently, Ukrainian President Volodymyr Zelenskyy stated that "Either Ukraine will have nuclear weapons and that will be our protection or we should have some sort of alliance. Apart from NATO, today we do not know any effective alliances."<sup>[63]</sup> Yet, the chance that Ukraine will be accepted into NATO while hostilities with Russia are ongoing and while Russia is occupying almost fifth of Ukraine's territory is near zero due to political divisions within NATO itself.

Ukraine reportedly possesses the technological know-how and material to build a rudimentary nuclear device within months.<sup>[64]</sup> But for now, it does not have near-term options to build it in a way that would advance rather than hamper its security interests—in addition to operational problems of delivering a rudimentary device to its intended target.<sup>[65]</sup>

*Ukraine's cautionary tale of getting invaded after it gave up nuclear weapons will hardly be lost on U.S. allies—and adversaries. If the United States fails to decisively support Ukraine against its righteous fight against the Russian invaders, it will lose the credibility on which U.S. assurance to allies depends. The implications could be far-reaching: from allies geopolitically aligning with U.S. adversaries to developing their own independent nuclear weapon capabilities.*

Russia's nuclear coercion and escalation threats have shaped its full-scale invasion from the beginning. These threats have been aimed at undermining Western unity in supporting Ukraine and have been successful to a degree. Until November 2024, the United States had not authorized Ukraine to use U.S.-provided long-range weapons to strike targets on Russia's territory. The West's rhetoric aimed at preventing escalation of the conflict has likely had the opposite effect by encouraging Vladimir Putin's continuing aggression.<sup>[66]</sup>

Russia's coercive use of nuclear weapons has helped to create space in which states perceive they can rewrite the rules of the post-Cold War security order. This will embolden U.S. nuclear-armed adversaries and make it more difficult for the United States and its allies to preserve the status quo—and the pressing problem of nuclear proliferation would become even worse should Ukraine lose.

## **Conclusion**



The geopolitical consequences of Ukraine's defeat would reverberate across the global system in disastrous ways for U.S. security. They include having to contend with a stronger and more belligerent Russia and its allies China and North Korea, a weakening of the U.S. alliance system, increasing demands on the already overstretched U.S. defense industrial base, and greater global impetus for nuclear proliferation. The United States, as a status quo power and leader of the free world, has an essential interest in seeing Russia decisively defeated in Ukraine, and so do U.S. allies, including in the Indo-Pacific. While comprehensive recommendations to prevent this worst outcome from coming to pass are beyond the scope of this *Information Series*,<sup>[67]</sup> Americans and their political leaders ought to have a proper understanding of the likely consequences of a Ukrainian defeat in order to make better informed decisions regarding U.S. measures to prevent that outcome.

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<sup>[58]</sup> *Memorandum on Security Assurances in connection with Ukraine's accession to the Treaty on the Non-Proliferation of Nuclear Weapons*, December 5, 1994, available at <https://www.pircenter.org/media/content/files/12/13943175580.pdf>.

<sup>[59]</sup> Maxim Tucker, "Could Zelensky use nuclear bombs? Ukraine's options explained," *The Times*, November 14, 2024, available at <https://www.thetimes.com/world/russia-ukraine-war/article/zelensky-nuclear-weapons-bomb-0ddjrs5hw>.

<sup>[60]</sup> Casey Michel, "Ukraine Now Faces a Nuclear Decision," *Foreign Policy*, November 7, 2024, available at <https://foreignpolicy.com/2024/11/07/ukraine-now-faces-a-nuclear-decision/>.

<sup>[61]</sup> Azmi Haroun and Erin Snodgrass, "Bill Clinton says he feels 'terrible' for pushing a 1994 agreement with Russia that resulted in Ukraine giving up its nuclear weapons," *Business Insider*, April 4, 2023, available at <https://www.businessinsider.com/bill-clinton-feels-terrible-convincing-ukraine-to-give-up-nukes-2023-4>.

<sup>[62]</sup> Victor Morton, "Ukraine foreign minister: Giving up nuclear weapons wasn't smart," *The Washington Times*, February 22, 2022, available at <https://www.washingtontimes.com/news/2022/feb/22/dmytro-kuleba-ukraine-foreign-minister-giving-nucl/>; and William Broad, "Ukraine Gave Up a Giant Nuclear Arsenal 30 Years Ago. Today There Are Regrets," *The New York Times*, February 5, 2022, available at <https://www.nytimes.com/2022/02/05/science/ukraine-nuclear-weapons.html>.

<sup>[63]</sup> Seb Starcevic, "Zelenskyy: We need NATO or nukes ... and we want NATO," *Politico*, October 17, 2024, available at <https://www.politico.eu/article/nato-nukes-volodymyr-zelenskyy-war-ukraine-aid-russia/>.

<sup>[64]</sup> Tucker, "Could Zelensky use nuclear bombs? Ukraine's options explained," op. cit.

<sup>[65]</sup> Oleg Sukhov, "Will Ukraine develop its own nuclear weapons?" *Kyiv Independent*, November 6, 2024, available at <https://kyivindependent.com/with-trump-back-in-white-house-can-ukraine-opt-for-nuclear-deterrence/>.

<sup>[66]</sup> Menkiszak, "Winning the War with Russia (Is Still Possible). The West's Counter-Strategy towards Moscow," op. cit., p. 63.

<sup>[67]</sup> For a solid list of recommendations to that effect see *ibid*.

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<https://www.heritage.org/sites/default/files/2025-01/IB5371.pdf>

***Yale University Press Calls It: An informed and urgent critique of U.S. foreign policy with China***

For close to a decade, the U.S. government has been preoccupied with the threat of China, fearing that the country will “eat our lunch,” in the words of President Joe Biden. In *The Rivalry Peril*, Van Jackson and Michael Brenes argue that great-power competition with China is misguided and vastly underestimates the risks that rivalry poses to economic prosperity, the quality of democracy, and, ultimately, global stability.

***WSJ The Bomb Is Back as the Risk of Nuclear War Enters a New Age***

***Fears of nuclear conflict are growing again as arsenals expand, alliances shift and treaties dissolve***

Wall Street Journal Online, Jan. 12 | Laurence Norman, Daniel Kiss, Ming Li and Peter Sidel

*At the end of the Cold War, global powers reached the consensus that the world would be better off with fewer nuclear weapons. That era is now over.*

Treaties are collapsing, some nuclear powers are strengthening their arsenals, the risk is growing that nuclear weapons will spread more widely and the use of tactical nuclear weapons to gain battlefield advantage is no longer unimaginable. The path to resurgent fears of nuclear war began in 1945, with the first nuclear test blast at the Trinity test site in New Mexico.

In 1963, during the throes of America's Cold War rivalry with the Soviet Union, President John F. Kennedy described his fear of a nuclear age without guardrails, in which dozens of nations possess weapons of mass destruction—what he called the “greatest possible danger and hazard.” For decades, arms-control agreements, technological challenges and fears of mutually assured destruction kept such a doomsday on the distant horizon.

As years passed, U.S. and Russian stockpiles of nuclear warheads grew, then shrank—while China, in recent years, began its ascent. The global stockpile reached a peak in the mid-1980s and has since been significantly reduced. In the first Start treaty, signed in 1991, the U.S. and Soviet Union agreed to cap the number of their warheads. But one of the two critical nuclear-arms-control pacts between Russia and the U.S., the Intermediate-Range Nuclear Forces Treaty, has collapsed. The New Start treaty, which placed even tighter limits on the number of deployed warheads on each side and the missiles and bombers that carry them, expires early next year.

Senior officials in Washington now say the U.S. needs to be prepared to expand its nuclear force to deter growing threats from Russia and China—raising the potential of a new arms race. China's growing stockpile of nuclear weapons is expected to triple by 2035, according to some estimates.

The latest estimates indicate that China has about 600 intercontinental ballistic missiles in its arsenal, all of which can reach the U.S. mainland, according to a Pentagon assessment of China's military released in December. Beijing has rejected past proposals that it meet with the U.S. and Russia to negotiate formal limits on nuclear forces.

The leading nuclear powers have intercontinental nuclear weapons. The U.S., Russia and China are all triad nuclear powers—meaning they can deliver nuclear weapons from land, sea and air, allowing them to launch an attack on any of their potential foes. The cover only currently deployed, land-based weapons. The Earth's circumference is roughly 24,900 miles.

While the U.S. and Russia whittled down their stockpiles, concerns have risen about the use of tactical nuclear weapons. These are weapons with shorter ranges and smaller yields, which could make a big difference on the battlefield in an otherwise conventional war without sparking a wider nuclear conflict. Moscow has hinted that it might use nuclear weapons in Ukraine and introduced a doctrine in November that made the grounds for potentially using them broader and more explicit. Western powers feared Russia might decide to use tactical weapons in the conflict if it found itself on the defensive.

Efforts to contain nuclear threats have centered on the 1970 Treaty on the Non-Proliferation of Nuclear Weapons, or NPT, which now has 191 signatories that have pledged never to acquire nuclear weapons or, for those that have them, pursue disarmament. But three nuclear-weapon states never accepted the NPT, and North Korea officially

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withdrew from the treaty in 2003. Iran, while a party to the treaty, could be months away from building a nuclear weapon; Saudi Arabia has said it would follow suit if that happened. The NPT gives the United Nations atomic agency only limited powers to prevent that.

President Kennedy's warning of the perils of a global arms race was an argument for a continued effort to limit arsenals through treaties. While those treaties, especially the NPT, have bound many nations into staying away from nuclear weapons, those commitments could be tested in a world of serious global tensions and the weakening of traditional alliances.

### ***News on Iran and Its Charm Offensive With Europe***

Iran has been conducting secret diplomatic missions to Russia to bolster its military and defense capabilities, despite forthcoming talks with the West designed to revive a nuclear treaty. Ali Larijani, a senior adviser to Iran's supreme leader, Ayatollah Ali Khamenei, has been shuttling back and forth on clandestine flights to meet senior Russian officials, The Times has learned, in backchannel efforts to gain Russian assistance on its nuclear program and air defense capabilities.

Larijani is Iran's former parliamentary speaker, nuclear negotiator and a trusted regime loyalist. He is a representative of Khamenei who is extremely close to the regime, with a reputation for getting things done. Late last year he was deployed to Damascus and Beirut several times in an attempt to solidify the "resistance," including after the Israeli assassination of Hezbollah's leader, Hassan Nasrallah. His secretive flights to Moscow signify a deepening of Iranian-Russian relations and increased leverage over one another.

Vladimir Putin will host Masoud Pezeshkian, the Iranian president, in Moscow on Friday, when the two sides will sign a "comprehensive strategic partnership." Judging by the name, the agreement will closely resemble an alliance signed between North Korea and Russia last year, committing the two nuclear-armed countries to defend the other in the event of an attack.

The strengthening of co-operation between Tehran and Moscow comes at a critical time for Iran, which has lost ground in the Middle East and is facing increasing economic hardship because of harsh Western sanctions. Iran's renewed discussions with Europe over its nuclear program are intended to bring the country back into the political sphere — the next round is scheduled in Geneva for Monday — but revelations about covert meetings with Russia are set to raise concerns over Tehran's intentions.

According to western intelligence sources, Tehran is looking for further assistance from Russia on nuclear topics and expertise, after decades of co-operation which included supplying Iran with nuclear fuel for a 1,000-megawatt light-water nuclear power reactor. "Since they are deepening their strategic relationship, and Russia is dependent on Iran for missiles and drones, there is concern that Moscow is ready to cross previously drawn red lines on the Iranian nuclear program," a Western intelligence source told The Times.

According to Dr William Albergue, Nato's former director of nuclear non-proliferation and a fellow at the Henry L. Stimson Center in Washington, [Russia](#) used to be part of the consensus that did not want Iran to be a nuclear power. "But maybe Russia made the decision, about the time when Iran started sending them thousands of drones to use in Ukraine, that nuclear proliferation is not such a big deal," said Albergue. Although Iran does not need help building a bomb, it would "certainly benefit from clandestine co-operation with Russia."

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Even if the visits were short, Iranian experts could learn from visiting Russian facilities, Albuquerque said. "You could fly a couple of Iranian scientists to Arzamas, Penza — any of the Russian nuclear production facilities — and they could learn a lot in 24 hours. A long working weekend would give the Iranians a lot of ideas." It would take longer, though, to produce the rest of the weapon and put it in a suitable missile for deployment, such as a ballistic missile. Estimates range from months to about a year.

Iran "could learn how to build a smaller, more complex bomb. Perhaps a megaton device. Or a nuclear device that can fit inside an artillery shell," Albuquerque said. Iran is also seeking the latest version of the Sukhoi Su-35 fighter as it attempts to upgrade the operational capabilities of its air force, Western intelligence sources said. Reports

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suggest they have already been purchased. Tehran also wants to reinstall its air defense systems, which were [destroyed by Israel](#) during the latest of round of attacks and counterattacks last year. The S-300 air defense missile systems were originally supplied by Russia.

Iran has also requested logistical help by using Russia's extensive presence in the region to rearm the Shia Muslim militia Hezbollah, whose leadership and weapons arsenal have [largely been taken out by Israel](#) during the past few months. Russia and Hezbollah were allied with the Assad regime in Syria against the rebel opposition who have now overrun the country. They have previously coordinated to preserve Assad's power and use Hezbollah's illicit financial networks to evade sanctions.

Photographs released by the Israeli military in December showed the extent of Russian weaponry originally owned by the Syrian military that is in the possession of Hezbollah. Moscow received Larijani, who was also a military officer for the Islamic Revolutionary Guard Corps, to discuss the delivery of drones and missiles for use in [Ukraine](#), an arms trade that Iran consistently denies despite evidence of the widespread use of Iranian-made drones in the war.

- [Middle East steps back from brink after Iran dials down rhetoric](#)

In November, The Times reported on a shipment of 100 missiles, packed in 25 containers and sent from Amirabad Port in northern Iran through the Caspian Sea. Missile transfer by air also led to new sanctions against Iran by the US, Germany, France and the UK, including against its national airline, Iran Air, which transported hundreds of short-range ballistic missiles to Russia.

Larijani's flights were conducted in secret because both countries are united in their efforts to evade further [western sanctions](#), as they already have to sell their oil at discounted prices. Iran desperately needs sanctions relief, with its economy destroyed and its currency having lost much of its value to the dollar.

Iran is meeting officials from the so-called E3 group — the UK, Germany and France — in Geneva, this week in the second round of talks to discuss Western concerns over the acceleration of Tehran's nuclear program. The sides first met in November and will hold two days of talks on Monday and Tuesday. Last month, the UK, Germany and France declared their "extreme concern" over Iran's enrichment capacity.

- [Why Britain keeps communication channel with Iran open](#)

The talks between Iran and officials from the E3 group are said to be in Geneva at Iran's behest, as the regime seeks to lift sanctions and resolve the nuclear impasse before Trump's inauguration this month. Iran has previously offered to cap its nuclear enrichment program at 60 per cent and allow International Atomic Energy Agency (IAEA) inspectors back into the country, signaling a move away from Iranian-Russian military co-operation.

Enriched uranium manufacturing of 90 per cent purity is required to make an atomic weapon — although any material enriched more than 20 per cent is thought of as military level. The agency says that Iran has [enriched uranium](#) to 60 per cent.

"Since the collapse of the Iran nuclear deal, Tehran has enriched 839.2kg of uranium to 20 per cent and 182.3kg to 60 per cent. Going from 20 per cent to 100 per cent is easy. They are a heartbeat away from bomb-making material," Albuquerque said.

Although Iran denies that it wants a nuclear bomb, the IAEA's estimate means the time needed to make enough of [weapons-grade uranium](#) could be weeks or days, if Iran further enriches its material.

Iran hopes to regain its footing after the demise of its non-state allies in the Middle East and may be looking to receive weapons systems and technologies directly and immediately. Its last line of defense in its national security policies is thought to be its nuclear program.

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During his first term in office, Trump unilaterally withdrew from the 2015 Iran nuclear deal with six major powers and re-imposed harsh sanctions on the Islamic republic. His incoming administration will have a short time to reach a deal thanks to a “snapback” mechanism that expires in October, which will see France and the UK reimpose UN sanctions on Iran. If sanctions are reinstated, Iran has threatened to withdraw from the nuclear non-proliferation treaty.

In the previous agreement of 2015, Iran had agreed to limit enrichment to 3.67 per cent, in a single facility. It also agreed to allow inspectors unfettered access to its nuclear facilities and potentially to undeclared sites. This led the US and many EU nations to unfreeze some \$100 billion worth of [Iranian assets](#) and to allow Iran to increase its oil exports.

Trump has called for a deal with [Iran](#), claiming to seek better relations, but has also warned that it “can’t have a nuclear program” and threatened “impossible” consequences over its attempts at nuclear proliferation. Should Iran seek to cross the nuclear threshold, it risks a pre-emptive strike by the US and Israel. Israel is banking on closer co-operation with the US over Iran with the change in administration. Israel’s prime minister, Binyamin Netanyahu, has long warned of the danger of a nuclear Iran. The conflict between the archrivals came out of the shadows last year with direct attacks on each other. Israel is coordinating with America over strikes [on the Iran-allied Houthis in Yemen](#), who have been targeting Israel and international shipping routes in the Red Sea since the start of the war in Gaza. Israeli officials increasingly believe that taking down the Houthi rebel group is the final move on their proxies before taking on Iran, preventing it from reaching its goal of nuclear proliferation.

[Opinion: Venezuela’s narco-military state threatens regional, global stability](#)

Venezuela has become “a militarized hub for narco-terrorism,” with a regime in Caracas now mirroring “rogue states such as North Korea” but wielding “a uniquely destructive influence in the Americas,” [writes](#) Miguel Angel Martin, president of the Venezuelan American Patriots Foundation and the former president of the Venezuelan Supreme Court in exile, in a column that includes his co-authors Ignacio De Leon and Esteban Gerbasi.

“Allowing Venezuela’s criminal state to persist is not an option. Its exportation of illicit drugs and violence destabilizes Latin America and endangers U.S. security,” [writes](#) Mr. Martin. “The regime’s militarized narco-terrorism is a tragedy for Venezuela and a crisis with far-reaching global consequences.” The time for symbolic gestures is over,” he [writes](#). “The United States must lead a global effort to isolate the regime, dismantle its networks and restore democracy in Venezuela. Anything less would betray not only the Venezuelan people but all who value peace and the rule of law in our hemisphere.”

### **Hegseth Will Implement the Trump Doctrine**

**By Francis P. Sempa**

**January 10, 2025**

[https://www.realcleardefense.com/articles/2025/01/10/hegseth\\_will\\_implement\\_the\\_trump\\_doctrine\\_1083952.html](https://www.realcleardefense.com/articles/2025/01/10/hegseth_will_implement_the_trump_doctrine_1083952.html)

During that 30-year time period since the end of the Cold War, there were two major exceptions to this record of failure: the first Gulf War in 1991, which was fought for the limited purpose of reversing Iraq’s conquest of Kuwait and possible aggression toward Saudi Arabia; and the mostly anti-interventionist policies of the first Trump administration. The first Trump administration came the closest of any post-Cold War administration to replicate the “peace through strength” approach of Ronald Reagan’s presidency.

Ronald Reagan won the Cold War by restoring pride in our armed services after the debacle of Vietnam and the disastrous Carter administration. He implemented a needed conventional and nuclear weapons build-up to offset a decade and a half of a Soviet military build-up. He jump-started our economy to support crucial defense increases. He waged successful political/economic/subversive warfare against the Soviet empire to exploit Soviet economic and political vulnerabilities, which caused the “evil empire” to collapse.

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The Reagan administration did not engage in endless wars and did not expend U.S. lives and resources in waging war for humanitarian purposes. Reagan used “human rights” as a cudgel to injure the Soviet empire. Unlike Carter, Reagan did not make human rights the centerpiece of his foreign policy. Reagan and his national security team—Casper Weinberger, George Shultz, Richard Allen, William Clarke, Jeane Kirkpatrick, Colin Powell, George H.W. Bush—won the Cold War without firing a shot (except for a brief and successful skirmish on the island of Grenada).

Pete Hegseth will bring to the position of Secretary of Defense an infantryman’s experience in the endless and futile wars of the first two decades of the 21<sup>st</sup> century. After graduating from Princeton University in 2003, Hegseth served as an infantry officer in the Army National Guard. He deployed overseas in Iraq, Afghanistan, and Guantanamo Bay, Cuba. He earned two Bronze Stars and the highly coveted Combat Infantryman’s Badge. One sergeant major who served with Hegseth in Iraq [described](#) him as a leader who was “very good,” “very smart,” “very articulate,” “open-minded and a very critical thinker,” and who “took everybody’s input,” and was “very eager to learn [and] listen.” “He put the troops first” and was “the first one through the door” during important missions.

An Army colonel who served with Hegseth in Afghanistan noted that Hegseth was “well-educated . . . a lifelong learner . . . who performed admirably” in challenging situations. That experience will be invaluable in ensuring that we avoid such policy debacles in the next four years. And what better way to reinvigorate the troops in every service than having one of their own running the Pentagon and serving in the president’s Cabinet?

What we know of Hegseth’s public views on major international and defense issues indicates that he will be a good fit for President Trump’s “America First” agenda. His experience in Iraq and Afghanistan has made him skeptical of neoconservative/neoliberal plans to spread democracy throughout the world. Seeing fellow soldiers die in endless wars focuses the mind and raises questions about the wisdom of the leaders and policymakers who either launched or perpetuated bad wars. It has also made him [question the wisdom](#) of interventionist policies in places like Ukraine, where the momentum of war and inertia of policy can lead to greater involvement by the United States and a possible war between nuclear-armed great powers.

Like Trump, Hegseth is a China hawk. He has been [quoted](#) as saying that the Chinese Communist Party (CCP) is “building an army specifically dedicated to defeating the United States of America.” China, he [said](#), has “a full spectrum, long-term view of not just regional, but global domination,” and it wants to “corner the market completely on the technological future.”

Hegseth’s views appear to coincide with those of Elbridge Colby, a defense expert who Trump [announced](#) will be nominated for Under Secretary Defense for Policy. Colby, who served as deputy assistant secretary of defense for strategy and force development in the first Trump administration, is one of the nation’s most influential [realist](#) thinkers. Colby was the chief author of the Pentagon’s 2018 National Defense Strategy, which shifted the nation’s national security focus from peripheral wars to great power competition, especially with regard to China’s global challenge.

Hegseth’s views also appear to coincide with the Weinberger Doctrine that helped shape Reagan’s and Bush 41’s approaches to national defense and waging war.

Reagan’s first Secretary of Defense, Caspar Weinberger, [announced](#) the doctrine at the National Press Club on November 28, 1984. Weinberger made several assertions that should also be nailed to the front door of the Pentagon:

- Our military should only be used if our own vital interests are at stake.

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- If our armed forces are committed to battle, our sole objective must be victory, and the size and composition of the force must be sufficient to achieve victory over the enemy.
  - We should not commit our armed forces unless we have “clearly defined political and military objectives,” as Clausewitz advised.
  - We should continuously reassess the relationship between our objectives and power and make whatever adjustments are necessary to win.
  - We should not commit the armed forces to combat unless the war has the support of Congress and the American people.
  - We should only commit our armed forces to combat as a last resort.

Reagan adhered to the Weinberger Doctrine, building up our military strength while using it very sparingly—peace through strength—and won the Cold War. His successor, George H.W. Bush, essentially adhered to the Weinberger Doctrine in successfully waging a brief war against Iraq in 1991. Bush’s Chairman of the Joint Chiefs of Staff Colin Powell invoked the principles of the Weinberger Doctrine in explaining how we waged war in the First Gulf War.

Hegseth and top deputies like Elbridge Colby must formulate and implement what should be called the Trump Doctrine. Its essence will be “America First” and “peace through strength.” Its focus will be the global challenge of China. It will likely include a Lippmann-esque assessment and adjustment of commitments and resources. Internally, it will mean ending the woke fixation on diversity, equity, and inclusion (which Hegseth has publicly criticized) in favor of reinvigorating the warrior culture. The failed military and defense leadership of most of the past 30 years must be abandoned. And perhaps Hegseth will suggest that we bring back the proper name of the department he will lead—the War Department.

*Francis P. Sempa writes on foreign policy and geopolitics. His Best Defense columns appear at the beginning of each month*

### **Iran Segment: Charm Offensive; Trump Iran Policy**

<https://www.aljazeera.com/news/2025/1/11/will-iran-go-for-a-nuclear-bomb-while-trump-is-in-power-in-the-us>

*The West’s last chance to impose UN sanctions as part of the nuclear deal will run out of time by October.*

By: [Maziar Motamedi](#) for Al Jazeera // Published On 11 Jan 2025 11 Jan 2025

**Tehran, Iran** – Donald Trump’s second term as president of the United States promises Iran a rocky road that could lead to different outcomes when it comes to its relations with the West, analysts say. US leaders, along with Israelis, have been openly discussing military strikes on top Iranian nuclear facilities and critical infrastructure like power plants and oil and petrochemical facilities.

#### **A shift, but to where?**

For more than two decades, Iran’s relationship with the West has largely been defined by developments in the country’s nuclear programme and efforts to stop it from getting a bomb. Tehran has consistently maintained that it does not seek a weapon of mass destruction. Recently, top political and military authorities in Iran have been discussing the possibility of [shifting Tehran’s officially stated policy](#) of not pursuing a nuclear weapon amid rising security threats.

There seem to be two schools of thought in Tehran: one appears open to the possibility of engaging the US, including on the nuclear programme, and another is vocal about pursuing a weapon, especially given the erosion of deterrence against Israel and setbacks to its regional allies, Naysan Rafati, senior Iran analyst at the Washington-based Crisis Group, pointed out. “But if the former camp prevails, it will still require willingness in Washington to

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engage Tehran – and given the Islamic republic’s vulnerabilities, there will likely be some inclination to press the regime harder rather than entertain concessions to it.”

Iran has lost one of the tenets of its forward defence strategy with the fall of Bashar al-Assad in Syria and the [blows dealt to its “axis of resistance”](#) across the region. The country is also labouring under extensive sanctions that are negatively affecting its already embattled economy, plummeting national currency and high inflation, [along with an energy crisis](#). Amid dire economic conditions, the government of Iranian President Masoud Pezeshkian, which is expected [to send its diplomats to Europe](#) later this month for talks with the E3 – France, Germany and the United Kingdom – looks like it wants to further engage with the West.

The overall framework being discussed appears similar to the JCPOA (Joint Comprehensive Plan of Action), Iran’s nuclear deal with world powers in 2015 – lifting some economic pressure on Iran in exchange for curbs on its nuclear programme. But no new framework has taken shape yet, and any talks so far appear to have been consultations aimed at clarifying viewpoints.

### **Appetite for a new agreement**

Things are different this time, compared with when Iran and the West negotiated for years in the leadup to the nuclear deal. In 2018, Trump reneged on the JCPOA and [imposed harsh sanctions against Iran](#). He also ordered the assassination of Qassem Soleimani, Iran’s top general and a main architect of its regional axis, five years ago. “Unlike the first Trump administration, the Europeans are going to be much more aligned to whatever policy the US chooses because the Europeans have in some ways endorsed the maximum pressure campaign themselves in recent years because of the growing tensions they have with Tehran.

Ellie Geranmayeh, deputy head of the Middle East and North Africa programme at the European Council on Foreign Relations said. This year should see major developments that will better clarify the direction of Iran’s nuclear programme, Abas Aslani, senior research fellow at the Center for Middle East Strategic Studies, told Al Jazeera. [Several of the JCPOA’s clauses have expired](#), Aslani said, so there is an increased willingness to negotiate a new understanding – especially since a main sunset clause of the JCPOA, which allows the West to reinstate any lifted United Nations sanctions on Iran (the snapback), will expire in October 2025.

Geranmayeh said the E3 is keeping snapback as the last tool they have to leverage Iran and they are aware that once it is used, it can set off a “very unpredictable chain of escalatory events”. However, there remains a major question mark over how Europeans respond if Trump demands an immediate snapback of sanctions on Iran by the E3 in exchange for tradeoffs on transatlantic issues dealing with European security, the expert said.

“We will either move toward significantly higher tensions or some sort of, albeit limited, agreement over the nuclear programme, depending on whether Iran and the US can reach some sort of understanding,” Aslani said. There is also a possibility Tehran and Washington may sit down for direct negotiations, something Iran has refused to do due to the US’s unilateral withdrawal from the JCPOA. “If the Trump administration tries to push too hard to get concessions, then it’s going to be exceedingly difficult to reach an agreement even if there’s a broader understanding,” he said.

### **Iran’s nuclear programme**

The latest information indicates Iran has not started building a bomb yet. However, a year after Trump left the JCPOA, it began increasing its level of enrichment and number of centrifuges, repeating the process after [Israeli attacks on its nuclear facilities](#) and international censure. It is now enriching uranium up to 60 percent, a relatively short technical step away from the more than 90 percent required for a bomb, with the IAEA reporting Tehran has enough fissile material for multiple bombs.

The increased nuclear activity gives Iran some leverage when it comes to talking to Trump, but it also comes with considerable risks, said the Crisis Group’s Rafati. “Tehran is enriching at near weapons-grade and with virtually zero breakout time, which blurs the line between a situation that is concerning and alarming enough for the US



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and/or Israel to consider military action,” he told Al Jazeera. Nuclear breakout time is the time required to produce enough fissile material for a bomb.

If it decides to go for a bomb, Iran would have to design and assemble a weapon, integrate it with a long-range missile capable of carrying a nuclear warhead, and successfully test it. We are in a short-term holding pattern as the “big elephant in the room” of Trump taking power is days away and there is still no clear idea how his administration plans to shape its ties with Iran, according to senior analyst Geranmayeh.

“I think in the first few weeks of 2025, Iran is unlikely to significantly escalate its nuclear activities unless President Trump aggressively doubles down on the maximum pressure campaign,” Geranmayeh told Al Jazeera. She added that Iranian nuclear activity may slightly cool if the US prioritizes diplomatic talks aimed at de-escalation, meaning two very different scenarios could unfold ahead depending on where Trump positions himself.

### **Here Are The Options For Dealing With An Imminent Iranian Nuclear Threat That’s Festered Under Biden**

#### [Here Are Trump’s Options For Dealing With An Imminent Nuclear Threat That’s Festered Under Biden](#)

By: Wallace White for the DCFN // 4h

Iran has largely been left unchecked by the Biden administration in its goal to become a nuclear power, presenting President-elect Donald Trump with a significant foreign policy challenge that has few easy solutions.

Iran, with its current stockpiles, can make a nuclear weapon with 60% enriched uranium in just one week, the International Atomic Energy Agency (IAEA) [said](#) in a November bulletin. The president-elect will have to choose a path quickly upon assuming office, such as renegotiating a deal to halt or slow Iran’s progress, military intervention or re-tooling sanctions that have so far been ineffective.

“The United States needs another Middle East war like it needs a hole in the head,” Justin Logan, director of defense and foreign policy studies at the Cato Institute, told the DCFN. “There are all kinds of angles from which escalation could happen, and Trump openly campaigned as a Peace Through Strength leader, not a warmonger. With that said, a lot turns on what Trump’s closest advisers will do to shape the president’s understanding of the options. Unfortunately, we’re heading to a fork in the road.”

The first, and perhaps most direct option, is a military strike from the U.S. on Iranian nuclear facilities. Trump advisers have reportedly expressed concern that Iran’s progress may be too far in, and a military strike may be the only option, [according](#) to Axios. Israel would be a prime candidate to assist with a strike, as it has [conducted](#) similar operations in the past. Trump [refused](#) to elaborate on his Iran strategy in a recent press conference, saying it would be “stupid” to disclose his strategy openly.

“The Trump Administration is committed to reestablishing peace & stability in the Middle East. President Trump will keep all options on the table as it relates to the Iran Regime including Maximum Pressure,” Brian Hughes, Trump-Vance transition spokesperson, told the DCFN. People burn a US and Israeli flag during a rally outside the former US embassy in Tehran as Iranians mark the 45th anniversary of the start of the Iran hostage crisis, on November 3, 2024 in Tehran, Iran. (Photo by Majid Saeedi/Getty Images)

Jason Brodsky, policy director of United Against Nuclear Iran, told the DCFN that Trump’s strategic ambiguity is actually an advantage that could allow diplomacy to still be an option. “You’ll see reporters ask him about a military strike on Iran, a preemptive military strike on Iran, and whether he would consider it, and the President doesn’t rule it out publicly,” Brodsky told the DCFN. “It keeps everyone guessing, and that helps us in our deterrence posture alone.

Having that kind of declaratory policy, keeping the unpredictability is important, and I think the Biden administration erred in its over-messaging and its reliance on diplomacy and de-escalation, and that emboldened the

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Iranians.” Despite lack of detail from Trump himself, people close to Trump are still hopeful that a deal may still be on the table, according to Axios. Logan told the DCNF that Trump’s ability to renegotiate deals could serve him well in keeping things peaceful with Iran.

“In his first term, Trump showed an ability to remake agreements that were quite similar to ones he had abandoned,” Logan told the DCNF. “For example, Trump replaced NAFTA with the USMCA, despite very small differences between the two deals. If he could replicate that approach with Iran, that is probably the best scenario.” The Iran nuclear deal (JCPOA) was [instituted](#) during the Obama administration, before former President Donald Trump withdrew the U.S. from the deal in 2018, promising to forge something better, but no new deal came during his term.

The JCPOA was often [criticized](#) for being too soft on Iran. “I think the JCPOA is a dead letter, although I hope I’m wrong about that,” Logan told the DCNF. The Biden administration attempted to renegotiate the JCPOA upon assuming office, but [admitted](#) in 2022 that the deal was “dead.” If Trump considers upping sanctions, he will have to improve on Biden’s lackluster measures that let Iran regain its wealth.

Under [President Joe Biden](#), Iran’s oil revenue rose to \$37 billion in 2021, \$54 billion in 2022 and \$53 billion in 2023, according to a [report](#) from the U.S. Energy Information Administration (EIA). Biden also gave sanctions waivers to Iran, which freed up \$10 [billion](#) of previously frozen dollars from their electricity exports. Iran [funds](#) various proxy terrorist organizations fighting Israel in the middle east, such as [Hezbollah](#) in Lebanon and Houthi rebels in Yemen.

Under [Trump](#), Tehran’s oil revenues fell from roughly \$65 billion in 2018 to \$28 billion in 2019, and even lower at \$16 billion in 2020, according to the EIA. Iran’s GDP relies heavily on oil exports, making sanctions on the commodity a plausible option to gain economic leverage, [according](#) to the Foundation for Defending Democracies (FDD). However, some doubt the effectiveness of sanctions, with foreign policy [experts](#) from Johns Hopkins University saying they end up hurting the middle class more than the leadership and key persons.

Biden was slow to enforce oil sanctions against Iran in the run-up to the 2024 election in order to keep gas prices down, with some Treasury [Department](#) officials reportedly frustrated that Biden was not doing enough to target Iranian oil exports. An Iran without nuclear capability would shift the dynamics of the region forever, Benham Ben Taleblu, senior fellow at the FDD, told the DCNF. Currently, Iran is on the back foot as Israel and the U.S. continue to pound [Hezbollah](#) and the [Houthi](#) rebels, both proxies that are backed by the Iranian government.

“If there is no nuclear threat from the Islamic Republic, that would be a huge change,” Taleblu told the DCNF. “The debate in policy circles has been, ‘how are you dealing with a nuclear threat?’ The Obama approach, the Biden approach, they call it a ‘pay-to-play’ approach. But the problem with that approach is that the leverage is all on their side.” Taleblu told the DCNF that the most accurate answers on Trump’s Iran policy will still come from Trump himself, even if he is reticent to disclose his plans.

“Everyone is going to be looking at who’s up, who’s down, who’s close to Trump, who’s not close to Trump, who are the internationalists in the cabinet, who are the isolationists in the cabinet,” Taleblu told the DCNF. “President Trump is actually remarkably candid, and rather than play criminology, I think it would be prudent to pay attention to what the most powerful man in the room is saying, and that is President Trump.” The White House did not

### ***China and Russia: Evading Sanctions & Moscow and Its Shadow Fleet of Oil Tankers***

Moscow has deployed a so-called shadow fleet of hundreds of aging tankers of uncertain ownership to keep oil revenue flowing and [evade sanctions](#) imposed by the U.S. and other Western powers as punishment for the Russian military invasion of Ukraine. The shadow fleet consists of aging tankers used often by nontransparent entities with addresses in non-sanctioning countries such as the United Arab Emirates or the Marshall Islands, and flagged in places such as Gabon or the Cook Islands, according to an Associated Press [analysis](#) published Tuesday. Some of the vessels are owned by the Russian state Sovcomflot shipping company. Their role is to help Russia’s oil exporters elude the \$60 per barrel price cap imposed by Ukraine’s allies.

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China remains a major buyer of Russian oil. Estimates vary, but S&P Global and the Kyiv School of Economics Institute have put the number at more than 400 Russian ghost fleet ships that can transport oil, or products made from crude such as diesel fuel and gasoline. Reuters [reported](#) Tuesday that Chinese and Indian refiners are seeking alternative fuel supplies as they adapt to severe new U.S. sanctions on Russian producers and tankers that are designed to curb the revenues of the world's second-largest oil exporter.

**Xi Ping/China; Joel Wuthnow LLNL Webinar January 14, 2025**

My notes from the LLNL webinar on China's Theory of Victory

3 ways that Xi Jinping discusses China's security policy over the next 5 years (2022-27) specifically re Taiwan. Focused and directed at US elites and decision makers. Theory of victory. Not bolt out of the blue but broader capability. The cost of intervention by the USA is very high....China thinks it has modernized enough and now can move/take risks/ Can PLA guarantee victory? Maintain dialogue at high level. Taiwan is not Ukraine.....Taiwan lots of escalatory dangers....messing with or using nuclear, cyber or space assets...

**Build A Shield**

2021--build a nuclear shield around China re Taiwan;

Overcome great power competition and new view of deterrence, support for Taiwan stronger

Deter US from stronger support of Taiwan; stop US from meddling in China-Taiwan affairs

**Deploy a Sword**

PLA authors have since 1990s discussed broadly deterrence; robust conventional and nuclear capability to deter, compel, coercive, shape the battlefield---much broader than deterrence per se. Related to Taiwan as well as other regional contingencies (Philippines);

**Symbol**

Bureaucratic code language used within the PLA; reference to the rocket forces, land based ballistic missile force....objective: keep the US out of the fight and prevent the US intervention on behalf of Taiwan.

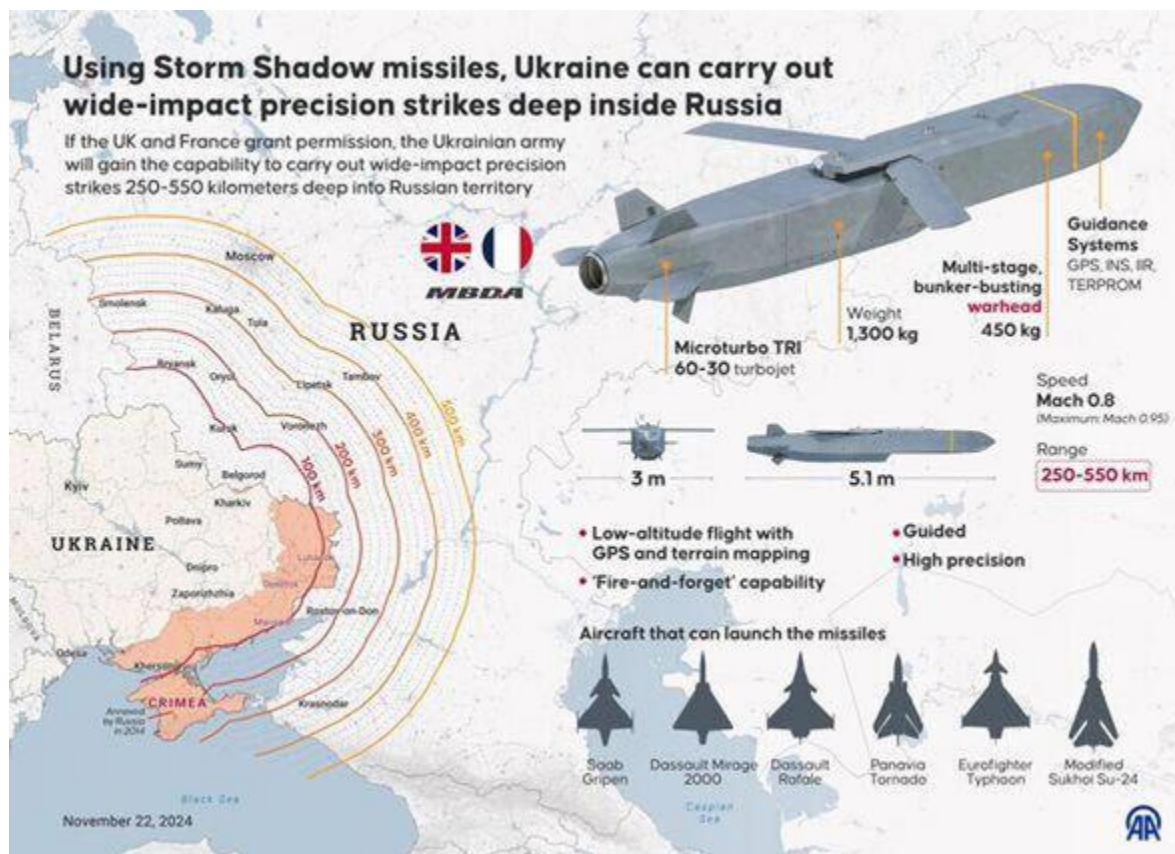
**PLA Options**

Deny US capability and target key nodes/center of gravity of US military including sensors, logistic bases, airfields in the Pacific.....Go after host nations Philippines, ROK, Japan, Australia....They could engage in strategic deterrence means threatening high risks for the US, not necessarily nuclear vs US cities, including nuclear signaling (Ukraine 2022)....use of conventional force, including conventional missiles aimed at US carriers, cyber-attacks of critical infrastructure (energy, transportation), also counter space weapons hold at risk military and civilian space assets, and then "people's war" deterrence---demonstrating popular resolve.....

Off/Exit ramp: what did China accomplish such as teaching the independence folks in Taiwan "a lesson" ---need to preserve their political status....or they need some kind of tangible asset-- some of the offshore islands.

**Ukraine and Russian Nuclear Threats: More**

Andrey Gurulev, a pro-Putin MP and reservist general, ominously declared on state TV: "There's still going to come a point where we're going to strike. It is inevitable." Gurulev further claimed, "If today Britain is hitting our territory with its missiles from Ukraine, everyone realises that they will not fly anywhere without NATO control systems and satellite navigation." "I believe that this is a direct reason for Britain to simply not be on Earth. And I'm not the only one who thinks that, we're not the only ones who think that."



hghdj© (Image: X/East2West news)

A Russian television commentator has made incendiary suggestions about [Russia's potential military response to the UK](#). Andrey Gurulev, a pro-Putin MP and reservist general, ominously declared on state TV: "There's still going to come a point where we're going to strike. It is inevitable." Gurulev further claimed, "If today Britain is hitting our territory with its missiles from Ukraine, everyone realises that they will not fly anywhere without NATO control systems and satellite navigation." "I believe that this is a direct reason for Britain to simply not be on Earth. And I'm not the only one who thinks that, we're not the only ones who think that." Reports are emerging from Russian Telegram channels of a fire at a Lukoil oil refinery in the Volgograd region of Russia. Locals claim to have heard an explosion before the fire broke out. Local authorities attribute the cause of the fire to "internal reasons, not by outside influence." Gurulev, a frequent guest on state TV, is known for his bold assertions about Russia's response to NATO countries' involvement in the Ukrainian conflict. Russia is currently experiencing a series of targeted attacks on key infrastructure such as ammunition factories and oil refineries by Ukraine. These attacks have resulted in explosions and large fires in several cities across the country.

### **Senator Mark Rubio: China, Panama and US Security**

Senator Marco Rubio and China: Mr. Rubio said a central issue he discussed during a visit to the canal in 2017 is that "Chinese companies control port facilities at both ends of the canal, east and west." Both military and security officials have expressed concerns that the canal could become a choke point to impede ships, he said.

Mr. Rubio said the former commander of the U.S. Southern Command, Army Gen. Laura J. Richardson, told him she has taken a flight over the canal and identified the Chinese civilian ports as "dual-use facilities that in a moment of conflict could be weaponized." "This is a legitimate issue that needs to be confronted," Mr. Rubio testified.

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Mr. Rubio said the matter needs to be studied, but that an argument could be made that China already has effective control of the canal. Because if they order a Chinese company that controls the ports to shut down or impede our transit, they will have to do it,” he said, noting that Chinese companies are under state control. “This is not a joke. The Panama Canal is a very serious issue.”

**Possible Nuclear Force Options for the United States In Addition to the Program of Record**

Overall adopt a sense of urgency (Admiral Charles Richard) and acquire systems “at the speed of relevance” (Gen John Hyten)

While these options below are possible, some may not be smart. The administration should of course receive briefings on the operational constraints, operational threats, and workforce limitations that will inform on the feasibility, cost and operational impact of such options, before the administration assumes such options are actually achievable.

As an ICBM advocate for the past 45 years, I caution that ICBM build-up options have to be reviewed re the cost, feasibility, timeline and impact on the current force and Sentinel program before being adopted.

However, the optics of Russia and China with thousands of nuclear warheads over and above the US force structure will force Congress and any administration to deal with what the strategic deterrent implications are of such a nuclear balance. And require very sound analysis of what and why a certain nuclear deterrent capability needs to be added to the US nuclear enterprise.

- ✚ Accelerate the Navy nuclear armed cruise missile program, potentially to decide on a near-term program and a follow-on version
- ✚ Decide to acquire more B21 Raider bombers than the projected 100 so additional nuclear capability is added to the US nuclear arsenal
- ✚ Decide to increase the LRSO buy to provide at least 1 missile/warhead for every available B-52 hook
- ✚ Proceed to return those B-52s to the nuclear role which would reverse the provisions under New START
- ✚ Proceed to return to nuclear deterrent service the four missile tubes on each of the 14 Ohio-class SSBNs
- ✚ Modify the Columbia class SSBN program to include at least 16 submarines
- ✚ Build a new government owned, company operated shipyard for building Columbia class submarines
- ✚ Add warheads to the D-5 missile up to the warhead capacity of 8 warheads per missile.
- ✚ Add warheads to the current 20-24 D5 missiles in each of the Ohio class submarines, knowing however that the Ohio class submarine is planned to go out of service between 2031-42 and the number of D5 missiles fall from 20-24 to 16 when the Columbia class submarine is deployed. .
- ✚ Develop a Tritium Mine Production Capability
- ✚ Build advanced missile defenses for protection of the US land based ICBMs and other nuclear assets such as strategic bomber/tanker bases
- ✚ Deploy +400 more ICBM warheads up to +800
- ✚ Deploy ICBM missiles in the 50 additional silos

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**\*Executive Summary: Do Nuclear Numbers Matter?**

Up to the SALT treaty of 1972, the US had a huge advantage in strategic nuclear forces. In 1965, we had 6000 strategic warheads and the USSR had 600. In the 1970's things began to change as the SALT I and II treaties put the good housekeeping seal of approval on the USSR and USA (smaller) buildup. A net assessment from 1983 had the USA at 8900 and the USSR at 7800 strategic warheads....At the time, the joint net assessment also concluded that absent START to similar arms control agreements, **the projection was a USSR with 14,000-23,000 strategic nuclear warheads by 1993.**

The US is faced today with a Russia and China combined with 110,000 strategic and theater nuclear warheads circa 2035---Experts Schneider, Fisher and Yeaw all generally agree on this number. The US could by 2030-5 build up to 3100 strategic and 400 theater warheads (my best projection given the currently planned force.)

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The issue is whether the perception matters if the public, Congress or our allies, believe the US is second or even third in nuclear deterrent numbers business and by a ratio of anywhere from 3-5 to 1? Especially if our national nuclear policy leaders confirm two things: that the current force or a modest buildup to 3100 strategic nuclear warheads can meet our targeting/deterrence requirements. And that there is no treaty requirement that both sides [or all three sides if China is included] have legal limits that would reflect a different and less disparate balance.

Of course what that number would be with R,C and the USA in a treaty is an interesting and difficult. But looking into the future, we have never been in a position of such imbalance and of course we are looking at two and not one nuclear armed peer adversary. And with a major imbalance even after the United States has modernized its nuclear force to the tune of hundreds of billions. In short, will numbers matter politically especially if there is a very large disparity between the USA on the one hand and Russia and China on the other?