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Analysis of today
Assessment of tomorrow

By: Stephen Holmes

The dangers of a power vacuum for Iran's nuclear infrastructure

Critics of the attack on Iran by the United States and Israel point out that US President Donald Trump has no plan for what comes next.

And they are not wrong: when Trump boasts that he can resolve wars in a single day, he merely exposes the limits of his attention span.

But the real problem is not the shortness of Trump's time horizon; it's the narrowness of his threat perception.

While Trump's bombing campaign reflects no strategy in any traditional sense, it is based on a clear operating assumption: the Iranian regime poses a threat to US security, and destroying the regime eliminates the threat.

It is the same basic belief that animated previous American wars of choice, from Iraq to Libya. The assumption was wrong then, and it is likely to prove catastrophically wrong now.

The US possesses an extraordinary capacity to destroy centralized state power from the air, but no comparable capacity to manage what follows.

Because power vacuums cannot be targeted by precision munitions or mapped by satellite imagery, American strategic thinking systematically underestimates the danger they pose.

This reflects a recurring cognitive bias in the US: threats we cannot address militarily receive less weight than those we can.

But the gravest and most durable risks often emerge after centralized control collapses, when arsenals are dispersed, custodial chains fracture, and accountability disappears.

Lessons from Iraq and Libya

The Iraq war should have made this clear. In 2003, the US destroyed the Iraqi state on the premise that Saddam Hussein's regime posed a direct and acute danger to American security.

What followed the regime's fall was not safety but chaos. Hundreds of arms depots were looted within days.

Black markets were flooded with small arms, rocket-propelled grenades (RPGs), and mortar rounds, which landed in the hands of actors who were far less predictable, visible, and deterrable than Saddam's regime.

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This included the Islamic State, which eventually rose from the rubble of Iraq's dissolved institutions.

When it overran Mosul in 2014, it captured large stocks of US-supplied weaponry from Iraqi army bases – a second generation of proliferation cascading from the original act of state destruction. The pattern was structural, not accidental.

Libya should have reinforced that lesson. After NATO helped topple Muammar el-Qaddafi in 2011, state institutions swiftly collapsed, and some 3,000-12,000 portable shoulder-launched surface-to-air missiles (MANPADS) capable of downing civilian airliners vanished, only to reappear in the arms markets of the Sahel, Sinai, Gaza, and beyond.

The aftermath is fragmentation, not stabilization

These episodes bear out what every systematic study of leadership decapitation in weakly institutionalized regimes has found: the aftermath is fragmentation, not stabilization.

The same will be true of Iran. But what will be dispersed after the regime's fall could be far more dangerous than RPGs or MANPADS.

Before the US-Israeli strikes last June, the Islamic Republic possessed some 441 kilograms of uranium enriched to 60% purity, a short

technical step from weapons grade. That is enough, by expert estimates, for roughly ten nuclear devices.

The International Atomic Energy Agency, whose inspectors have been effectively barred from Iran's nuclear sites since the strikes, has stated that it cannot account for the current size or whereabouts of Iran's stockpile of enriched uranium.

Some analysts think that it was entombed in collapsed underground facilities; others believe it was relocated to undisclosed sites before the bombings.

Both assessments rest on fragmentary evidence – satellite imagery, signals intelligence, and Iranian government statements, all of which are vulnerable to manipulation. But they cast doubt on the Trump administration's claim of "total obliteration."

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The strategic irony at the heart of the regime-destruction logic is that damaged facilities, scattered nuclear material, and demoralized or absent custodial personnel are precisely the conditions most conducive to diversion.

In other words, far from ending the risk of proliferation, the US-Israeli strikes have compounded it.

Even if the probability of diversion remains low, it must be handled with the utmost seriousness.

This is the cardinal principle of nuclear security: fissile material that is not under secure state control must be evaluated on the basis of worst-case potential, not average likelihood.

When terrorist networks gained access to

MANPADS, it was a catastrophe. If they secure weapons-usable nuclear material, the logic of nuclear deterrence itself would be broken.

The underlying threat

Deterrence requires a return address – even if the address is a hostile state. Even a hostile state has a capital, a leadership, and a population it wishes to preserve.

Remove them, and the architecture that has prevented nuclear use since 1945 begins to collapse.

You cannot negotiate safeguards with a vacuum. You cannot sign an agreement with a fragmented territory. You cannot verify compliance by a state that no longer exists.

Eliminating a visible adversary does not neutralize the underlying threat – Donald Trump, Pete Hegseth

The state that currently maintains custodianship over Iran's nuclear material – however imperfect or hostile – is the only entity with which an enforceable constraint could be achieved.

Destroy it, and you make resolving the nuclear threat both more urgent and effectively impossible.

The Soviet precedent is instructive. When the USSR dissolved in 1991, the degradation of security systems left nuclear materials vulnerable. Following the lead of George Soros, who created a foundation to support Soviet scientists with the aim of preventing brain

drain and mitigating the risk of nuclear proliferation, the US began to invest heavily in cooperative threat-reduction programs.

Iran's situation is, in some respects, more precarious, as its nuclear infrastructure has long combined declared and clandestine elements.

And physical material is not the only concern. Iran has trained a substantial cadre of nuclear scientists over the decades.

In a state-collapse scenario, such specialists become free agents, available to anyone willing to pay.

Lower-grade nuclear material, meanwhile, could be repurposed into radiological dispersal devices ("dirty bombs") capable of contaminating urban areas. In the absence of institutional custody, each enrichment site, research facility, and reactor implies distinct risks.

The US sees regimes it can strike and concludes that striking them resolves the dangers they pose.

But eliminating a visible adversary does not neutralize the underlying threat; it merely transforms that threat into something elusive, opaque, decentralized, unaccountable, and impossible to negotiate with or monitor.

Until the US recognizes this – until it internalizes the lessons of Baghdad and Tripoli, and potentially of Tehran – it will continue to generate dangers that no missile can reach.

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