The Next Looming Crisis?: Iran’s Nuclear Program

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Status of Nuclear Talks: September 2022

• Months of indirect talks have been ongoing in Vienna aimed at re-starting the Iran nuclear deal

• Talks paused in March when Russia sought to use its approval as leverage to reduce sanctions aimed at it

• August – EU presented “final proposal to U.S. and Iran

• Joseph Borrell, lead EU negotiator: ”I am sorry to say that I am less confident today than [48] hours ago about the convergence of the negotiation process and the prospect of closing the deal

• Significant issues:
  • Status of Islamic Revolutionary Guards Corps
  • Status of IAEA investigation
IAEA Probe

• Uranium particles found at 3 undeclared nuclear sites in 2019

• Iran demands closure of IAEA probe before return to nuclear deal

• Rafael Grossi, IAEA head: Unless “Iran provides technically capable explanations for the presence of the uranium particles” ... the IAEA will not be “in a position to provide assurance that Iran’s nuclear program is exclusively peaceful.”

• U.S. State Department: “Iran needs to answer the IAEA’s questions” ... “our position is not going to change.”
Why Does the U.S. See a Nuclear Iran as Dangerous?

- Threat to Israel and other U.S. regional allies
  - Limitations on U.S. capacity to respond

- Creates an unstable Middle Eastern nuclear bipolarity
  - Israel vs. Iran
  - Incentives for both sides to perceive a “use it or lose it” environment

- Incentivize broader regional nuclear proliferation
  - Saudi Arabia, Egypt

- Potential for allied security pressure on U.S.
  - Other pressing concerns

- Risk of nuclear theft, dissemination to non-state actors
What is Iran?

- Consensus view: Iran is a revisionist power in the Middle East

- Beyond this consensus, two opposing views:
  - Iranian government is an irrational regime driven to advancing its apocalyptic vision of the Middle East
    - Elimination of Israel
    - Spread of Shia Islam
  - Iranian government is a rational actor driven to ensure the survival of the regime
    - **U.S. National Intelligence Estimate**: “Tehran’s decisions are guided by a cost-benefit approach rather than a rush to a weapon irrespective of the political, economic, and military costs.”
Options for Dealing with Iran’s Nuclear Program

- Negotiate
- Bomb
- Deter
2015 JCPOA

- Joint Comprehensive Plan of Action – Iran nuclear deal
  - Agreement reached between Iran and the P5+1 in July 2015 and implemented in January 2016
  - Purpose was to prevent Iranian development of nuclear weapons
Key Components of the JCPOA – Iranian Concessions

• 10-year limitation on number of centrifuges
• 15-year limitation on uranium stockpile and enrichment
• 15 years of continuous IAEA monitoring of Iranian facilities
• Conversion of Fordow facility into a research center with Russian assistance
• Processing limitations at the Arak facility
• Mechanism for inspections of undeclared sites
• Allowed snap-back sanctions for non-compliance
Key Components of the JCPOA – P5+1 Concessions

• Termination of all EU nuclear-related sanctions

• Termination of all U.S. nuclear-related sanctions

• Termination of UN Security Council nuclear-related sanctions

• Removal of individual targets of EU and U.S. sanctions
## Criticisms of the JCPOA

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<th>Criticism</th>
<th>Details</th>
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<td>Allowed Iran to resume large-scale enrichment after 15 years</td>
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<td>Did not require Iran to end its ballistic missile program</td>
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<td>Did not require Iran to end its involvement in regional conflicts &amp; use of proxies</td>
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<td>Did nothing to address human rights concerns in Iran</td>
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• April 2017, July 2017 – U.S. certifies Iranian compliance with the agreement

• October 2017 – President Trump rejects certification of Iranian compliance with the agreement
  • Argues that Iran is violating the “spirit” of the agreement & demands flaws in agreement be addressed

• May 2018 – U.S. withdraws from agreement; re-imposes sanctions
  • Adopted “maximum pressure” campaign
  • Terminated foreign oil waivers
Uranium Enrichment Key Points & Iran’s Trajectory

- 3.67% - level permitted by JCPOA
- 20% - January 2021
- 60% - April 2021
- 90% - level required for nuclear weapons
Iran Response to U.S. Withdrawal

- Iran suspended compliance in stages
- Began enriching uranium to 60%, expanded faster centrifuges
  - Only country without nuclear weapons to enrich to this level
- Limited IAEA inspections
- Began converting uranium gas to uranium metal
  - Key step in developing a nuclear weapons
2021 U.S. Shift

• The election of President Biden in November 2020 brought a change in the U.S. approach to Iran
  • Movement away from “maximum pressure”
  • Focus on multilateral efforts to deal with Iran
  • Signaled U.S. intention to return to negotiations over Iran’s nuclear program & broader issues
What Do the Two Sides Want?

• U.S. – Iran does not get material to develop nuclear weapons
  • Other non-nuclear disputes

• Iran – lifting of sanctions to help struggling Iranian economy
  • Current inflation ~50%
  • Add 6% to GDP in 2024
  • Reduce unemployment rate 2%
Other American Concerns

• Status of American prisoners in Iran

• Iranian missile capabilities

• Iranian support of Hezbollah and Iraqi militia groups

• None of these issues addressed by the JCPOA
Approaches to a New Agreement

• “More for more”
  • More sanctions reduction

• “Less for less”
  • $100B release of frozen assets
Rumored Contours of a Potential Renewed Agreement

- Iran gives up stockpile of enriched uranium
- Ceases enrichment above 3.67%
- Removes centrifuges in operation
- Allows return of IAEA inspectors
Benefits of a Renewed Agreement

• BATNA – best alternative to a negotiated agreement

• For U.S.: BATNA is not very appealing

• For Iran: Agreement would bring sanctions relief, resumption of oil sales, thaw of asset freeze
Obliged by law, we halted voluntary implementation of Add'l Protocol.

Fully compatible with JCPOA §36 since:
- @POTUS has yet to cease US violation
- E3 continue to fail to meet obligations

Understandings w/ @rafaelmgrossi show our good faith.

All remedial measures reversible.
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4:54 AM · Feb 23, 2021 · Twitter for Android

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Reminder: Because of US withdrawal from JCPOA, there is NO P5+1.

It is now ONLY Iran and P4+1.

Remember, Trump left the room and tried to blow it up.

Gestures are fine. But to revive P5+1, US must Act: LIFT sanctions.

We WILL respond.

Here is the key sequence: #CommitActMeet

3:04 AM · Feb 19, 2021 · Twitter for Android

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The E3 and the United States affirmed their shared objective of Iran's return to full compliance with its commitments under the JCPOA. Secretary Blinken reiterated that, as President Biden has said, if Iran comes back into strict compliance with its commitments under the JCPOA, the United States will do the same and is prepared to engage in discussions with Iran toward that end.

In this context, the E3 and the US called on Iran not to take any additional steps, in particular with respect to the suspension of the Additional Protocol and to any limitations on IAEA verification activities in Iran. The E3 and the United States are united in underlining the dangerous nature of a decision to limit IAEA access, and urge Iran to consider the consequences of such grave action, particularly at this time of renewed diplomatic opportunity. They reiterated their full support for the professional and impartial role of the IAEA and its Director General and their efforts to implement the necessary verification and monitoring of Iran's nuclear commitments under the JCPOA.
• High levels of mistrust between two sides
  • Negotiations have occurred indirectly
  • What will Iran do with improved financial position?

• Time-inconsistency problems
  • Iran – lack of faith in U.S. ability to uphold an agreement after 2024
    • U.S. will not accept binding mechanisms
    • U.S. – Iran is using delay tactics to buy time for program

• Shifts in international system
  • Multipolarity
  • European energy dependence
  • Easier sanction evasion

• Domestic politics
Domestic Politics & a JCPOA Renewal

• U.S. – Iran policy has become a highly partisan issue
  • Midterm elections – resolution of disapproval
  • Republicans see a win either way:
    • No agreement – Biden diplomatic failure
    • Agreement – weak Biden loosens sanctions

• Iran – domestic politics also matters
  • Nuclear program enjoys public support
  • Hardliners see dangers in nuclear agreement:
    • Step toward limiting Iran’s regional program
    • Step toward limiting Iran’s missile program
    • Opening for human rights pressure
    • Foster ties between reformers and West
Is the JCPOA Already Dead?

- Iran has already enriched 18 times the amount of uranium allowed by the JCPOA
  - Iran has already enriched uranium to 60%, enrichment to 90% could take just a few weeks
  - Time still needed to produce a nuclear bomb

- Key elements of JCPOA begin to sunset in 2025, gradually loosening constraints on Iran

- Iran likely sees lifting of sanctions as temporary; little likelihood of follow-on agreements

- U.S. lead negotiator Rob Malley – “you can’t revive a dead corpse”
No Deal: A Return to Maximum Pressure?

• Implementation of a new maximum pressure strategy against Iran is likely to be more challenging now

• Iran has already made major leaps in its nuclear program
  • Little distance remains to breakout

• Little room for new sanctions

• Global collective action more difficult – Russia, China

• Diminished U.S. regional footprint
  • Credible commitment problems
The Military Force Option - Redlines

- President Biden, July 2022:
  U.S. is prepared to use force “if that was the last resort” ... “prepared to use all elements of its national power to stop Iran”

- Establishment & clear communication of redlines for force is important
  - Production of weapons-grade material
  - Point where prevention of breakout is impossible
  - Nuclear capable missile development
Challenges of Targeting Iran’s Nuclear Program

- Iran’s nuclear facilities are:
  - Dispersed
  - Buried
  - Have significant air defenses (S-300 surface-to-air missiles)
Limitations of Military Action Against Iran’s Nuclear Program

- Would delay, not end the program
  - 2011 U.S. estimate: 3-year delay
  - “Mowing the grass”

- Likelihood of nationalist backlash
  - Increased support for regime & nuclear program
  - Conclusion that only nuclear weapons yield safety

- Difficult to distinguish from a regime change effort
  - Large attack over several days
  - High probability of regional retaliation

- Environmental risks
  - Radiological risks to nearby civilians
Iranian Military Response Capabilities

• U.S. CENTCOM Commander Gen Kenneth McKenzie:
  “Now they [Iran] can strike effectively across the breadth and depth of the Middle East. They could strike with accuracy and they could strike with volume.”

• Emphasis on low-cost, distributed, asymmetric warfare
  • More accurate short & medium-range ballistic missiles
  • Fast attack-boats
  • Suicide drones
  • Improved electronic warfare capabilities
Likely Iranian Retaliatory Efforts

- Closure of Strait of Hormuz

- Ballistic missile attacks on regional allies
  - Israel: Airport, desalination plant, power plants

- Use of regional proxies in Iraq, Syria, Yemen, & Lebanon
  - Hezbollah threat against Israel
What About More Limited Action Against Iranian Nuclear Program?

- Cyber attacks
  - Operation Olympic Games under Bush and Obama administrations
- Covert operations
- In last 2 years, Israel has:
  - Assassinated Iran’s top nuclear scientist
  - Caused explosions at 4 nuclear and missile facilities
- Iran has recovered quickly from these efforts
Israel & Iran’s Nuclear Program

• Israel sees Iran as its preeminent threat in the Middle East

• A nuclear Iran is viewed as an existential threat to Israel

• Divisions in view of JCPOA renewal:
  • Israeli Military – Largely support.
  • Allows Israel to focus on other threats
  • Financial benefits overstated
  • Mossad – Oppose.
  • Assets funding proxy wars
  • Frees Iran to build nuclear bomb

• PM Yair Lapid, Benjamin Netanyahu oppose agreement
Why U.S. Military Force Against Iran May Not Just be a U.S. Decision

- Scenario: Israel concludes that Iran is nearing the ability to produce a nuclear bomb & decides to launch a strike on its own

- What would the U.S. do?
  - Unilateral Israeli strike unlikely to be successful
    - Lack of substantial “bunker buster” capability
    - Air-to-air refueling
  - Iran virtually certain to see an Israeli strike as either with the consent of the U.S. or a prelude to an American strike
Live with a Nuclear Iran?

- Analysts and policymakers questioned the ability to deter a nuclear Soviet Union and a nuclear People’s Republic of China
  - Both revisionist powers
  - Both staunchly ideological powers
  - Both saw little possibility for accommodation with the U.S.

- Deterrence depends upon:
  - Imposition of unacceptable costs
  - Denial of a strategic goal

- Deterrence of Iran would require both general and extended deterrence

- Iran would have to be deterred against both *using* nuclear weapons and *threatening* the use of nuclear weapons
Questions & Discussion