



# Iran on Nuclear Precipice as Oversight Dwindles

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*Iran's dangerous belief in its deterrent edge over the United States and Israel, which is painfully apparent in Tehran's unrequited proxy attacks and other pressures against both countries since October 7, is compounded by its expanding capacity to produce a survivable arsenal's worth of weapons-grade uranium in short order, and by the outside world's growing uncertainty about how close it is to achieving all the elements of a nuclear weapon.*

*Having just missed a great chance to revive serious international pushback on Iran's illegal activities, and with Tehran having just flipped the most credible obstacle to its continued nuclear aggression – Israel's military readiness – on its head by bogging Israeli forces down in Gaza, the West Bank, and Lebanon, the Biden administration and Congress must fill this now-yawning gap by sharpening U.S. redlines, tying them and America's regional force buildup explicitly to Iran's nuclear program, and closing ranks with their European partners to begin undoing nearly a decade of unmerited legitimization and encouragement of Iran's approach to the nuclear weapons threshold.*

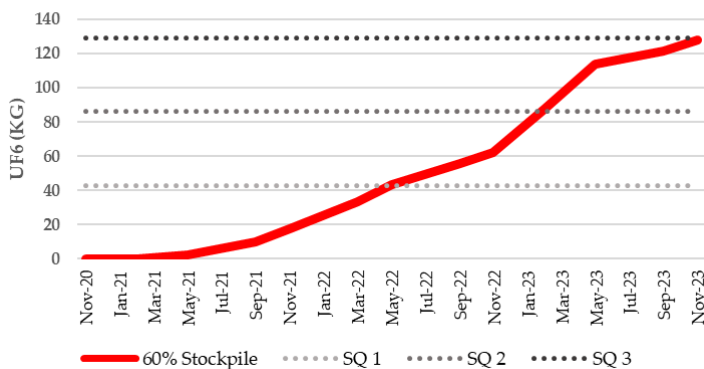
## What Happened?

- During the most recent quarterly meeting in Vienna of the International Atomic Energy Agency's (IAEA) Board of Governors that began on November 22, the United States and its British, French, and German partners failed to censure Iran in light of the latter's recent [decision](#) to expel key IAEA inspectors, its unfulfilled obligations to increase transparency and resolve outstanding international [concerns](#) about its work on a nuclear weapon, and the unabated expansion of its enrichment program to produce near-weapons grade uranium.
  - » These developments undermine reported unofficial U.S. efforts to de-escalate tensions with Iran, including by having Tehran partially [dial back](#) its most worrisome nuclear advances, namely its production of near-fissile 60 percent enriched uranium.
- Several weeks prior, on October 25, the head of Iran's Atomic Energy Organization [announced](#) additional expansions of the country's nuclear program, including new mining operations that could expand its uranium enrichment capacity as well as a new heavy water reactor that could ultimately enable Iran to reprocess spent fuel into plutonium for a nuclear bomb.
  - » As with its new, [deeply-buried](#) nuclear facility near Natanz that was first publicized in May, Tehran has given no indication it intends to open these facilities to inspectors, in violation of its IAEA safeguards agreements.

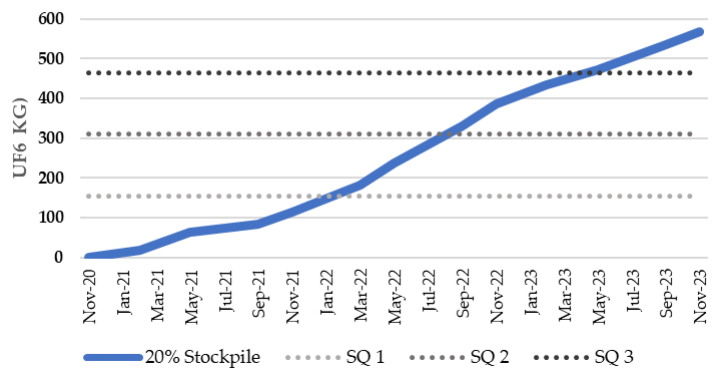
## Why Is It Important?

- Iran’s ongoing progress into the gray zone of nuclear weapons capability – in which it is widely perceived to be “a screwdriver’s turn away” but not verifiably possessing the bomb – gives it much of the leverage of nuclear deterrence without clearly crossing U.S. and Israeli redlines or incurring serious blowback, as seen in its serial proxy attacks on U.S. forces, grave verbal threats against the United States and Israel, and the repeated U.S. and European failure to reimpose stringent UN sanctions on Iran. Tehran’s increasingly dangerous nuclear ambiguity and ongoing escalation are driven by four interrelated factors:
  - » Its concerted expansion of the core elements of its enrichment program, including its 20 and 60 percent enriched uranium stocks, enrichment capacity, and relevant facilities;
  - » Growing indications that its work on a nuclear weapon could be ongoing, and much closer to the finish line than previously assessed;
  - » Its increasing obstruction, in violation of its safeguards agreements, of international inspectors seeking greater fidelity on the nature and extent of the above activities; and
  - » Low, and decreasing, U.S., EU, and Israeli credibility to prevent or punish any further Iranian nuclear gains.
- New data from the IAEA shows how Iran continues [advancing](#) its ability to produce a small arsenal’s worth of fissile material in short order:
  - » Drawing on its 60 percent stocks, Iran could produce a bomb’s worth of weapons-grade uranium (90 percent) in under three weeks, using only the two cascades of advanced IR-6 centrifuges currently producing 60 percent uranium at its deeply-buried Fordo facility.
  - » In total, Iran could produce fissile material for six bombs in [one month](#) with its existing 20 and 60 percent stocks, and four more bombs’ worth over the following two months.
  - » A sneak-out attempt would be aided by the fact that Fordo’s two operational IR-6 cascades are [interconnected](#) in such a way as to simplify the process of enriching beyond 60 percent while reducing the likelihood of detection.
    - Iran experimented with this new configuration in January to briefly enrich [84 percent](#) uranium – a development which IAEA inspectors detected only by happenstance during an unannounced site visit.

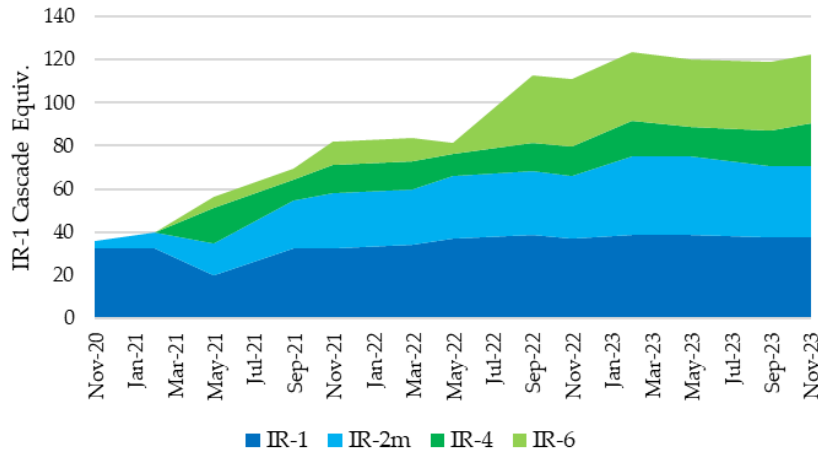
Iran's 60 Percent Stockpile



Iran's 20 Percent Stockpile



## Iran's Expanding Enrichment Capacity



- In parallel, Tehran’s potential ongoing work on a functional nuclear weapon – namely, the explosive device that would put fissile material in warheads for Iran’s sizable fleet of [nuclear-capable](#) missiles – rang alarm bells in the United States and Israel earlier this year by disabusing all three guiding, and rather sanguine, assumptions about this issue:
  - » In March, then-Joint Chiefs of Staff Chairman Gen. Mark Milley [testified](#) to Congress that Iran “would only take several more months to produce an actual nuclear weapon” after producing fissile material – an assessment that significantly undercut previous estimates that Tehran would need 1-2 years to finish a nuclear device.
  - » In May, Gen. Milley’s Israeli counterpart, Gen. Herzl Halevi, [contradicted](#) previous U.S. and Israeli assessments that Iran would proceed with weaponization only after achieving fissile material, when he warned publicly that Israel was “closely examining ... possible negative developments on [this] horizon that could prompt action.”
    - One key example is Iran’s experimentation with producing 20 percent enriched [uranium metal](#), in a trial run for converting fissile material into uranium metal for a nuclear explosive device that could fit in a missile warhead.
    - This truncated timeframe for weaponization, combined with the possibility it is ongoing, undermines the assumption such a move could reliably be detected in a timely fashion.
- These uncertainties about the shrinking timeframe, and detection window, of any breakout attempt are compounded by Tehran’s steadily-expanding [obstruction](#) of IAEA inspectors:
  - » September’s [expulsion](#) of one-third of the most experienced IAEA inspectors in the country is the latest step in Iran’s escalating campaign, both to roll back international oversight of its enrichment program and to [stonewall](#) parallel inquiries seeking to clarify the extent of its past – and potentially ongoing – efforts to build a nuclear weapon.
  - » Most alarmingly, since February 2021 Iran has restricted or prevented IAEA [verification](#) of activities related to centrifuge manufacturing, the design and development of a nuclear weapon, and the construction of new enrichment and other nuclear facilities that could enhance Iran’s ability to produce fissile material without being detected.
  - » Tellingly, neither the Fordo interconnection nor the 84 percent enrichment experiment were declared to inspectors, in violation of Iran’s IAEA safeguards agreements.
- This [accumulating](#) “mass of activity about which we don’t know anything,” as the IAEA Director General put it already a year ago, gives Iran crucial leverage: firstly, by raising U.S.

and EU fears that any punitive measures might trigger final, but unknowable, steps across the nuclear threshold; and, secondly, by sidestepping or confounding explicit Israeli and U.S. [redlines](#) – 90 percent enrichment and a nuclear weapon, respectively – whose credibility is predicated on sequential and observable Iranian progress toward the bomb.

- » By remaining a “screwdriver’s turn away” from an actual bomb, such an approach could enable Tehran to accrue the deterrent and compellent benefits of the ultimate weapon without triggering political, economic, or military retaliation by overtly crossing U.S. and Israel redlines or publicly violating its Non-Proliferation Treaty (NPT) obligations.
- By shattering Israel’s vaunted military reputation, straining its forces on multiple fronts at home, and distracting it from concerted [preparations](#) to strike Iran’s nuclear facilities, events since October 7 could embolden Tehran to advance its nuclear program further and/or leverage its opaque position astride the nuclear weapons threshold to constrain Israeli operations against Hamas and Hezbollah, and to dissuade further U.S. support for Israel.
  - » Similarly, fears of Iranian nuclear and/or regional escalation already [self-deterred](#) U.S. and EU officials from censuring Tehran at last month’s quarterly IAEA Board of Governors meeting and referring the matter to the UN Security Council, even as they issued full-throated warnings about Iran’s activities.
- Especially in light of Israel’s current distraction, Iran’s readiness to advance and obscure its nuclear program will hinge even more heavily on U.S. deterrence, but, as underscored by the latest IAEA non-vote, the Biden administration has hollowed out its credibility by overtly signaling an overarching desire to avoid running any immediate risks with Tehran – even at the cost of greenlighting steadily greater Iranian nuclear and regional aggression.
  - » The collapse of an unofficial U.S.-Iran “[not-a-deal](#)” from the summer, as evidenced by the 70-plus [attacks](#) on U.S. troops in the Middle East since October 7, highlights how even massively one-sided and conciliatory U.S. diplomacy and sanctions relief fail to appease or curtail Iran’s malign behaviors at best, and often incentivize such behaviors by directly contradicting and undercutting U.S. promises to punish such aggression.
    - In stark contrast to its clear rhetorical and material support for Israel, the administration advertises its reticence to prevent escalation against its own forces by stating, unprompted, that [responding](#) militarily “is not what we want, not what we’re looking for,” and that the United States “has no [intention](#) or desire to engage in further hostilities.”
- Alongside its European partners, the United States has similarly undermined its credibility on the nuclear front by issuing repeated alarmist warnings to Iran while conspicuously taking zero diplomatic steps to fulfill these threats (see table).

## *Iran Blows Past Empty Threats to Punish its Nuclear Violations*

| <i>Date</i>               | <i>Precipitating Event</i>   | <i>Statement</i>   | <i>US/E3 Action</i>                    |
|---------------------------|--|--|--|
| <b>June 20, 2020</b>      | Iran fails to provide credible explanations for traces of undeclared man-made U.   | <u>U.S.</u> : "Iran must immediately comply with its IAEA safeguards and provide the IAEA nothing short of full cooperation. If Iran fails to cooperate, the international community must be prepared to take further action."   | IAEA BoG resolution, no UNSC referral. |
| <b>September 16, 2020</b> | Iran fails to provide credible explanations for traces of undeclared man-made U, and denies other access to IAEA.                        | <u>U.S.</u> : "Iran's unprecedented denial of required IAEA access in disregard of its legal obligations is wholly unacceptable."  | None.                                  |
| <b>November 18, 2020</b>  | Iran fails to provide credible explanations for traces of undeclared man-made U.   | <u>U.S.</u> : "Iran's failure to resolve concerns, after almost two years of engagement, is absolutely unacceptable. Iran, or any other state under safeguards, cannot be allowed to revise its explanations indefinitely."  | None.                                  |
| <b>March 4, 2021</b>      | Iran fails to provide credible explanations for traces of undeclared man-made U, and rolls back transparency measures at declared sites. | <u>U.S.</u> : "This Board spoke clearly in its June 2020 resolution: Iran must cooperate fully with the Agency and satisfy its requests without further delay."  | None.                                  |
| <b>June 10, 2021</b>      | Iran fails to provide credible explanations for traces of undeclared man-made U.   | <u>U.S.</u> : "Failing to hold Iran to [its NPT obligations] would undermine the integrity of the international safeguards system and set a troubling precedent for international efforts to ensure that Iran is adhering to all of its nonproliferation commitments." | None.                                  |
| <b>November 25, 2021</b>  | Iran fails to provide credible explanations for traces of undeclared man-made U.   | <u>U.S.</u> : "It is imperative that the Board break the current pattern of Iran's 11 <sup>th</sup> -hour attempts to undercut Board unity and forestall Board action in the face of continued Iranian non-cooperation."   | None.                                  |
| <b>June 9, 2022</b>       | Iran fails to provide credible explanations for traces of undeclared man-made U.   | <u>U.S./E3</u> : "The authority of the [IAEA] and integrity of the NPT safeguards regime are at stake.... The challenge posed by Iran's insufficient cooperation on substance is serious and ongoing."   | IAEA BoG resolution, no UNSC referral. |
| <b>June 30, 2022</b>      | Iran removes IAEA cameras and monitoring equipment.  | <u>U.S.</u> : "When Iran defies the [UN] Security Council repeatedly – without consequence – it undermines the fundamental credibility of this Council."   | None.                                  |
| <b>November 17, 2022</b>  | Iran fails to provide credible explanations for traces of undeclared man-made U.   | <u>U.S.</u> : "Iran must now provide the necessary cooperation, no more empty promises."   | IAEA BoG resolution, no UNSC referral. |
| <b>December 19, 2022</b>  | Iran enriches 60 percent U. at Fordo and continues blocking inspectors.  | <u>U.S.</u> : "This is not acceptable. There must be some degree of accountability for openly violating resolutions of the [UN Security] Council."   | None.                                  |
| <b>March 8, 2023</b>      | Iran enriches 84 percent U.  | <u>U.S.</u> : "Iran must provide full and immediate cooperation with the IAEA."<br><u>U.S./E3</u> : Iran's action "is an extremely grave escalation [that] brings Iran dangerously close to weapons-related activities."   | None.                                  |
| <b>June 7, 2023</b>       | Iran fails to provide credible explanations for traces of undeclared man-made U, and for U metal production.                             | <u>U.S.</u> : "Iran must provide the Agency with the information and access that it requires.... If Iran fails to take these actions, the Board should be prepared to hold Iran to account at the appropriate time."   | None.                                  |
| <b>September 13, 2023</b> | Iranian foot-dragging on implementing agreed-upon IAEA transparency measures.  | <u>E3</u> : the IAEA Board of Governors is "prepared to take further action ... to hold Iran accountable in the future, including the possibility of a resolution."  | None.                                  |
| <b>November 24, 2023</b>  | Iran expels IAEA personnel and continues obstructing in-country inspectors.  | <u>U.S./E3</u> : "Iran cannot continue its lack of cooperation Board after Board without bearing consequences."  | None.                                  |

## What Should the United States Do Next?

- Especially in light of Israel's current distraction, Iran's readiness to advance and obscure its nuclear program will hinge even more heavily on U.S. deterrence, but, as underscored by the latest IAEA non-vote, the Biden administration has hollowed out its credibility by overtly signaling an overarching desire to avoid running any immediate risks with Tehran – even at the cost of greenlighting steadily greater Iranian nuclear and regional aggression.
- As Iran's nuclear and regional leverage become increasingly mutually-supportive in the wake of October 7, the Biden administration needs a coherent messaging campaign that treats Iran-led multifront pressure against Israel, attacks against U.S. forces in the region, and any further nuclear advances as a single problem set – which in turn entails recognizing that [deterrence](#) is fungible and the credibility of commitments is interdependent.
  - » By treating its clear and strong support for Israel as categorically separate from its own painfully obvious desire not to be forced to respond to Iran's nuclear expansions and proxy attacks on U.S. forces, the administration encourages Tehran to escalate vertically via further proxy strikes against Israel and the United States, and horizontally by continuing to build out and obscure its nuclear weapons program.
  - » Addressing this credibility and clarity deficit requires stronger [warnings](#) to Tehran that the United States will respond how and where it chooses, including directly against Iranian targets, to any Iran-led escalation that threatens itself, Israel, and/or the region.
  - » As a complement to the president's unequivocally robust "[don't](#)" redline on Iranian intervention against Israel and the accompanying U.S. regional force buildup, the Biden administration should explicitly issue a redline against Iran achieving nuclear weapons [capability](#) rather than its higher current bar of a working Iranian nuclear weapon.
  - » This should be enhanced with strategic communications that convey how key capabilities the United States is surging through the region, from carrier strike groups to strategic bombers, can effectively counter the gamut of Iran's escalatory options.
- To put paid to their long-running threats to isolate Tehran diplomatically – and to undergird the credibility of their longstanding concerns and redlines – over Iran's systematic and gross NPT violations, American and European officials should convey their unity of readiness, should Iran not immediately comply with its legally-binding IAEA safeguards obligations, to "snap back" UN sanctions on Iran's nuclear weapons program.
  - » Having both allowed the UN ban on Iranian drone and missile transfers to [expire](#) in October and self-inflicted the missed opportunity to censure Iran at last month's IAEA meeting and refer the matter to the UN Security Council, the United States and its British, French, and German (E3) partners can [implement](#) a provision in UN Security Council Resolution (UNSCR) 2231 (2015) to reimpose six previous UNSCRs from 2006-10, five of which are legally-binding, that sanction Iran's enrichment, revive a complete arms embargo on the country, and prohibit its ballistic missile-related activities.
    - Such diplomatic action is inseparable from an enhanced U.S. deterrence posture, as past IAEA censure resolutions and empty threats merely [encouraged](#) Iran to escalate its nuclear activities further in the absence of credible threats to punish such moves.
  - » Several actions by Congress can reinforce such diplomatic efforts by the administration, including:
    - Initiating the "legislative snapback" process to block further U.S. sanctions relief for Iran and signal bipartisan congressional support for enhanced pressure on Tehran;
    - Continuing to convey [directly](#) to E3 countries the need to snap back UN sanctions on Iran, including by passing a resolution to this effect; and
    - Enhancing oversight, and ensuring accountability of, the Biden administration's lax [enforcement](#) of existing U.S. sanctions targeting Iran's oil trade and other lucrative forms of sanctions-busting.