

The Iranian Nuclear Strategy—Is It About to Change?

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In recent months, as Iran has approached the nuclear threshold and shortened the times for producing nuclear weapons, and as the monitoring by the International Atomic Energy Agency over the nuclear facilities has significantly declined, Iran could likely decide to change its policy and achieve nuclear weapons capability. Although a decision on this matter poses risks to Iran—military conflict with Israel and possibly even the United States—Iranian leader Ali Khamenei could retreat from his current position that maintaining the nuclear threshold is sufficient. Therefore, through a credible military threat, the Iranian leadership must be convinced that progressing to nuclear weapons will directly endanger the regime’s survival. At the same time, the international community should embark on a series of political and economic moves to persuade Iran to rollback its nuclear program.

In recent years Iranian officials have mentioned the possibility that Iran’s nuclear strategy could shift toward producing nuclear weapons. However, in the past year and especially in recent months, the preoccupation with this issue has increased considerably. Iranian statements often refer to the advanced technological status of their nuclear program, stressing the potential to produce nuclear warheads within a short time. Former head of the Iranian Atomic Energy Organization, Ali Akbar Salehi, claimed in an interview aired on Iranian television in February 2024 that the regime has all the necessary components for nuclear weapons but has not assembled them. Mahmoud Reza Aghamiri, president of Shahid Beheshti University and a nuclear scientist, said in April 2024 that Supreme Leader Ali Khamenei can at any time withdraw his fatwa banning the production of nuclear weapons and that Iran is capable of producing them.

The increasing tensions between Iran and Israel in recent weeks, including mutual attacks, have raised concerns in Iran that Israel could strike at Iranian nuclear facilities—which it has threatened before over the past decade—in response to Iran’s attack on Israel on April 13. In this context, the commander of the Nuclear Facilities Defense Unit in the Islamic Revolutionary Guards Corps (IRGC), Ahmad Haqtalab, warned that if Israel tries to damage the nuclear facilities, Tehran might reconsider its nuclear doctrine. A few days later, Javad Karimi-Ghodousi, a hardline member of the Majlis National Security and Foreign Policy Committee, claimed that Iran needed only one week to conduct nuclear testing from the moment Khamenei gives permission, while Saeed Laylaz, an Iranian economist and consultant to the previous reformist president, Mohammad Khatami, stated that Iran should conduct its first nuclear test

in the event of an attack. Mehdi Mohammadi, an advisor to the head of the Iranian Parliament, tweeted on X that Iran has a nuclear program in addition to its missile program—in what can be interpreted as an implied threat to Israel and its allies.

At the same time, official Iranian spokespersons continue to emphasize the civilian nature of the nuclear program. In response to statements by Majlis member Karimi-Ghodousi, Nasser Kanaani, the spokesperson for Iran's Ministry of Foreign Affairs, stressed in a press conference in Tehran that nuclear weapons have no place in Iran's defense doctrine. On April 25, 2024, Iranian news websites published an infographic prepared by the Islamic Revolution Documentation Center, featuring a collection of statements from Iranian leaders that deny the development of nuclear weapons based on religious rulings by Iran's leaders.

Status of the Nuclear Program

The Iranian nuclear program has made significant progress since President Trump's withdrawal from the nuclear agreement in May 2018 and Iran's subsequent decision to violate its obligations to the agreement beginning in the summer of 2019. The quantities of material enriched to various levels, including 60%, allow the production of military-grade fissile material for a first nuclear facility within a week, and for multiple facilities within a few weeks. At this stage, it is estimated that it will take several more months—up to 18 months by some estimates—to produce a nuclear warhead for a missile. In this context, it is important to note the remarks of the head of the International Atomic Energy Agency (IAEA), who stated that countries that do not have nuclear weapons do not enrich to 60% and there is no civilian need for such high levels of enrichment.

In addition to the advanced status of the Iranian nuclear program, there has been a significant decline in the monitoring of the nuclear facilities by the IAEA over the past three years. Tehran has not cooperated with the agency, according to the Additional Protocol and failed to respond to the IAEA's questions about its past activities at undisclosed sites, and to this day, the purpose of these sites is not clear and where the material contained in them was transferred. Since February 2021, Iran also stopped the IAEA from monitoring the production, assembly, and storage of advanced centrifuges. According to the latest IAEA report, it no longer has knowledge about the production and stock of centrifuges, rotors, bellows, heavy water, and uranium ore concentrate. Even if cooperation is renewed, the IAEA will face difficulty providing a clear picture of Iran's nuclear activities. Additionally, Iran revoked the visas for several nuclear inspectors who have extensive knowledge of the Iranian program. At the same time, Iran is in advanced negotiations with Niger to purchase natural uranium, which Washington is trying to prevent. These negotiations reflect Tehran's ongoing attempts to increase its uranium stocks. Furthermore, Iran has begun constructing a new

nuclear facility in Natanz, which is heavily fortified and buried in concrete at a depth expected to reach 100 meters. The aim is to prevent the possibility of any aerial attack, by Israel or the United States, which is equipped with penetrating bombs, although it is not clear if these bombs can reach such a depth.

Iran's activity in its nuclear program, along with the various statements made recently, could indicate a renewal of its nuclear strategy among decision makers, or at least, attempts of Iranian officials to press for a discussion of this possibility. A series of developments—Iran's proximity to the nuclear threshold, the escalating risks of direct military conflicts with Israel and possibly even the United States, growing Russian and Chinese support for Iran, Iran's own assessment that it has achieved a strategic balance with Israel through its missile and drone capabilities, and the challenges faced in effectively implementing the proxy concept following the lessons learned from the war in Gaza—could strengthen the voices within the Iranian leadership calling to deepen the nuclear threshold and to enhance their ability to break into nuclear weapons within a short time. Although it is not clear that this will occur, Khamenei could conceivably decide to advance to nuclear weapons based on a reassessment that considering the growing threats to Iran's national security, it is no longer possible to deter its enemies by relying on the nuclear threshold.

If such a decision is made, it will represent a significant change in Khamenei's position. This possibility cannot be ruled out, particularly in light of his willingness to deviate from his previous policy of avoiding a direct attack on Israel, risking Iranian involvement in a regional war. Furthermore, the increased strength of conservative and hardliners within the Iranian leadership, particularly since Ebrahim Raisi was elected president in 2021 and the personnel changes in the Supreme National Security Council, as well as the strengthened position of the IRGC in decision-making processes, should also be taken into account. Additionally, the multitude of conflicts and challenges in the regional and international arenas consume national resources—intelligence and operational—from both Israel and the international community—and could detract their attention from the Iranian nuclear program.

It could also be plausible that all the preoccupation with the decision on whether to break into nuclear weapons is intended to exert pressure on the international community to discourage it from taking harsh measures against Iran, such as the transfer of the nuclear file to the UN Security Council, and to rekindle the motivation for renewing dialogues between the United States and Europe with Iran.

What can be done?

Currently, it is important to focus on making it clear to Khamenei and his decision-making partners that any progress toward nuclear weapons will directly threaten the

survival of the Iranian regime, while efforts should be made to reverse the nuclear program through a partial settlement/negotiation or by increasing the pressure on Tehran. Since the United States plays a central role in leading these efforts, it is crucial that Israel do all that is possible to avoid any public disagreements with the United States that could escalate tensions and hinder their strategic dialogue on Iran.

The Iranian regime sees the decision to break into nuclear weapons as dangerous, particularly in the context of Washington's response. Therefore, the American administration should be prepared to build a coalition that will explicitly warn Iran against crossing any red lines that could provoke a military response.

The negotiations with the IAEA as well as the visit of the director general to Tehran should not be used for another empty gesture from Iran. It is important that the visit will promote effective monitoring of Iran's nuclear program and not just pay lip service with superficial measures.

The European countries, specifically Britain, France, and Germany, which are not interested in implementing the clause renewing the sanctions (snapback) in the 2015 nuclear treaty (JCPOA) should at least be required to warn Iran that they will not allow the clause to expire as planned in October 2025 unless Iran scales back its nuclear activity. In the economic sphere, despite the difficulties in implementing effective sanctions on Iran due to the support that it receives from Russia and China, it is important to enforce the existing sanctions against Iran, especially those targeting its oil exports, which have recovered in recent months and have reached relatively high levels.

In conclusion, based on the assessment that the US administration and its European partners are interested in resuming negotiations with Iran on halting the progress in its nuclear program, it is important to ensure, particularly through dialogue with the United States, that if the talks resume, then the objective is for Iran to rollback its program. These discussions should not merely be a tactic for Iran to buy time while continuing its nuclear program. Dialogue on this subject with the American administration is not detached from Israel's overall relations with the United States, with a particular emphasis on the fighting in Gaza. The more open Israel is to the American vision for "the day after" in Gaza, the more attention the administration will give to Israel's position on the nuclear issue.

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