

## CHAPTER 2

# NUCLEAR AMBIGUITY AT A DECISION POINT

### **The Status of Iran’s Nuclear Program After the War**

On the eve of the war, Iran was a nuclear-threshold state with the ability to complete the enrichment of its existing uranium stockpile to 90%—fissile-weapon-grade material—within less than two weeks of a decision, and likely only a few months away from achieving an initial military nuclear capability. This capability was intended to provide deterrence against its enemies and serve as an insurance policy for regime survival. Nonetheless, Iran’s Leader refrained from ordering the breakout to nuclear weapons, apparently out of concern that such a move would drag Iran into a military confrontation with Israel and—worse—with the United States. For years, Iran preferred gradual and safer progress on the nuclear track over the fastest possible route.

The war significantly set back the Iranian nuclear program. Israeli and American strikes severely damaged the three main facilities tied to uranium enrichment, to the point that their rehabilitation is highly uncertain.<sup>38</sup> The Natanz enrichment plant—the central site, which housed thousands of centrifuges, both older models and advanced types—was heavily damaged. It appears to be completely inoperable, and roughly 15,000 operational centrifuges were likely destroyed. The underground Fordow enrichment facility, where advanced centrifuges had been installed and performed enrichment to 60%, was also apparently seriously damaged in the American strike, although no conclusive open-source information exists regarding the extent of the

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38 Raz Zimmt and Tamir Hayman, “Between a nuclear agreement and active containment: Israel and Iran’s nuclear program after the war,” *Institute for National Security Studies (INSS), Policy Paper*, July 20, 2025. <https://tinyurl.com/4f2ybed8>

damage to its enrichment capabilities. Moreover, some reports cast doubt on the degree of destruction to the centrifuge halls at the site.<sup>39</sup>

The Nuclear Technology Center in Isfahan was also likely severely damaged. This center was used to convert uranium compounds from “yellowcake” into uranium hexafluoride (UF<sub>6</sub>)—the feedstock required for enrichment—and to reconvert UF<sub>6</sub> into metallic uranium used to create a fissile core for a nuclear weapon. Most operational centrifuges at Isfahan were apparently destroyed, and Iran’s capacity to manufacture additional centrifuges was also damaged, though the extensive knowledge and experience in this field remain intact.

The war left Iran with residual capabilities that could be used to rebuild the program—and even to pursue the breakout to nuclear weapons. Iran retained at least several hundred centrifuges, including some that had been manufactured but not yet installed in the two enrichment facilities before the war. It should be noted that since February 2021, Iran has not allowed the International Atomic Energy Agency (IAEA) to monitor the production or storage of centrifuges. In addition, Iran still possesses a stockpile of over 400 kg of uranium enriched to 60%, which it held before the war. It is unclear whether this material was removed from the declared sites and dispersed to hidden locations, or whether it remained in one or more of the facilities that were struck—and to what extent it can be used. Moreover, smaller quantities of lower-enriched uranium likely remain as well.

Shortly after the war, a senior Israeli official estimated in an interview with *The New York Times* that at least some of the fissile material survived the strikes but is now buried under Natanz and Fordow, and that “nothing was moved.” He expressed confidence that any Iranian attempt to extract

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39 James Glanz, Samuel Granados, Junho Kee, Eric Schmitt & Marco Hernandez, “The invisible target in Iran.” *The New York Times*, August 20, 2025. <https://tinyurl.com/3x3a4sxh>

the uranium would likely be detected and would trigger another strike.<sup>40</sup> In August 2025, Prime Minister Benjamin Netanyahu confirmed that Iran still had 400 kg of enriched uranium, but emphasized that it had been known in advance that the uranium would not be destroyed and that this alone is not sufficient to produce nuclear weapons.<sup>41</sup> Iranian Foreign Minister Araghchi also acknowledged that the remaining fissile material was buried “beneath the rubble” of the nuclear facilities struck by Israel and the United States.<sup>42</sup>

In principle, Iran’s remaining capabilities could allow it in the future to enrich uranium to 90% at a covert site. Such enrichment does not necessarily require multiple cascades; one or two cascades of advanced centrifuges (100–200 machines) may suffice. The process could take place over several weeks, especially if Iran opts for an accelerated emergency program and if a covert facility—or several small decentralized ones—has already been prepared. Iran could also reconvert UF<sub>6</sub> into metallic uranium at alternative sites, such as university chemistry labs or chemical plants, and it is possible that infrastructure for such sites has already been established. If carried out covertly and without adherence to safety protocols, the process could take a few months at most. A key challenge would be transporting the remaining fissile material to the relevant conversion sites.

A nuclear breakout would be more complex. It is unclear how far Iran had advanced before the war regarding the assembly of an explosive device, though it is evident that significant progress had been achieved and that Iran possessed the necessary technical know-how. Nor is it known how the war affected Iran’s progress in producing the detonation mechanism.

40 David E. Sanger, “Some of Iran’s enriched uranium survived attacks, Israeli official says.” *The New York Times*, July 10, 2025. <https://tinyurl.com/njxc49as>

41 Netanyahu in an exclusive interview with i24NEWS: “Iran has 400 kg of enriched uranium left; we knew in advance it would not be destroyed.” *i24NEWS*, August 12, 2025. <https://tinyurl.com/4k23pbcs>

42 AFP, “Iran says enriched nuclear material ‘under rubble’ of facilities hit amid Israel war.” *Times of Israel*, September 12, 2025. <https://tinyurl.com/2s9jv6mm>

Several facilities tied to the weaponization program—including the Parchin complex and the headquarters of the Organization of Defensive Innovation and Research (SPND) in Tehran—were struck during the war, but the extent of the damage is unclear. A disruption in one stage of the weaponization process could delay the entire chain, though the duration of any such delay is unknown.

The targeted killing of more than ten senior nuclear scientists—who served as key repositories of expertise in weaponization fields—has also had a significant impact on Iran’s nuclear knowledge base and potentially on its ability to recruit qualified scientists in the future. Although a pool of personnel in relevant fields exists who could replace some of those eliminated, this pool likely lacks comparable experience and expertise. Iran may therefore choose to pursue a faster, less orderly, and less safety-conscious path than would be considered acceptable in the West. In any case, a conservative assumption must be adopted: if Iran makes the decision, it could advance toward a nuclear weapon through a covert and decentralized program distributed across multiple sites, even if a fully operational capability—including ballistic missiles with nuclear warheads—would not be feasible in the short term.

### **Iran’s Nuclear Dilemma**

We can assume that Iran’s motivation to obtain nuclear weapons has increased in light of the lessons of the war, which further exposed the failure of its deterrence against Israel and the United States. Like most components of Iran’s strategic power, the nuclear program began during the Shah’s era. After the Islamic Revolution, the program was frozen by order of Ayatollah Khomeini, who viewed it as incompatible with his conception of the spirit of Islam.

However, the Iran–Iraq War prompted the Iranian regime to renew its nuclear effort in the mid-1980s, following the severe blow Iran suffered during the war and Iraq’s use of chemical weapons and missiles against it. For years, senior Iranian officials repeatedly stated that Iran was not developing

nuclear weapons and would never seek to do so, because they believed such weapons were not useful and because Iran's Leader deemed them religiously forbidden. Nevertheless, Khamenei has never retreated from his position that a military nuclear-threshold capability would provide Iran with effective deterrence against its enemies, and is therefore essential for ensuring the regime's survival. He has also not changed his long-standing assessment that the nuclear issue serves merely as a pretext for the West to pressure, isolate, and weaken Iran in preparation for achieving its central strategic objective: regime change.

Furthermore, the 2003 decision by Libya's former leader Muammar Qaddafi to dismantle his country's nuclear program—an act that did not prevent his eventual overthrow with Western support—has been cited by Khamenei as evidence that Iran is right to refuse capitulation to Western demands in exchange for Western incentives. Similarly, the contrast between the immunity enjoyed by nuclear-armed North Korea and the fate of Saddam Hussein, who possessed no such weapons, is seen in Iran as further proof of the necessity of nuclear weapons alongside other strategic assets, foremost among them Iran's long-range missile force.

The regional developments that have unfolded since October 7, 2023—above all the weakening of Hamas, the decisive defeat of Hezbollah, and the fall of the Assad regime—have presented the Islamic Republic with growing security challenges and have cast doubt on the validity of its security doctrine, particularly on the effectiveness of two of its key pillars of deterrence: the proxy network and its strategic military capabilities (ballistic missiles and UAVs). The collapse of the proxy network and Iran's failure to deter Israel through its strategic missile arsenal have intensified doubts regarding Tehran's ability to counter Israel's military superiority and deter it from further action against Iran.<sup>43</sup>

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43 Raz Zimmt, "Toward possible changes in Iran's security concept," *Institute for National Security Studies INSS Insight*, No. 1915, November 18, 2024 <https://tinyurl.com/yf5uw2u5>

Against this backdrop, an increasing number of voices in Iran have argued that deterrence must be strengthened—including through a change in nuclear doctrine and consideration of a breakthrough to nuclear weapons, which would provide the ultimate “insurance policy” against Israel and the United States. As Iran continued its efforts to advance and entrench its nuclear-threshold status, and possibly to shorten its breakthrough time, senior Iranian officials called for a reassessment of nuclear strategy and for no longer being satisfied with threshold status alone. For example, in February 2024, former foreign minister and former head of the Atomic Energy Organization of Iran, Ali Akbar Salehi, stated that the regime possessed all the components needed for a nuclear weapon, though they had not yet been assembled.<sup>44</sup>

In October 2024, dozens of members of parliament sent a formal letter to the Supreme National Security Council calling for a revision of the Islamic Republic’s defense doctrine regarding the nuclear program.<sup>45</sup> On October 26, 2024, the chairman of the Strategic Council on Foreign Relations, Kamal Kharazi, declared that revising the nuclear doctrine remained an option should Iran face an existential threat. He stressed that the technical capabilities for producing nuclear weapons already existed, and that only the Leader’s judgment prevented their realization.<sup>46</sup>

Until the outbreak of the war with Israel, there had been no indication that the Iranian leadership under Khamenei had decided to alter its nuclear strategy and move toward nuclear weapons. However, the public statements in Iran supporting a reconsideration of its nuclear strategy suggest that the issue was also being discussed within the corridors of power in Tehran. Since the war, the voices supporting a nuclear breakthrough as a necessary consequence

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44 “Iran signals it is closer to building nuclear weapons.” *Iran International*, February 12, 2024. <https://tinyurl.com/yrmxnkj6>

45 “Iran MPs call for nuclear deterrence amid tensions with Israel.” *Iran International*, October 9, 2024. <https://tinyurl.com/yc686ysd>

46 “Iran adviser hints at expansion of missile range, nuclear doctrine review after Israel strikes.” *Reuters*, November 1, 2024. <https://tinyurl.com/2kk2w83k>

of the Israeli–American attack, have grown stronger. In September 2025, seventy-one members of the Majles called for the development of nuclear weapons following the 12-Day War. In a letter sent to Iran’s president and the Supreme National Security Council, the lawmakers argued that Iran’s defense doctrine must be reassessed, and that the development and possession of nuclear weapons had become necessary in light of the attack.<sup>47</sup> Ahmad Naderi, a member of the Majles Presidium, asserted that the only way to safeguard Iran’s territorial integrity and national security was through the acquisition of nuclear weapons. According to him, withdrawing from the Nuclear Non-Proliferation Treaty (NPT), adopting a policy of ambiguity, and ultimately conducting a nuclear test were the only options that could prevent Iran from meeting the fate of Iraq and Libya.<sup>48</sup>

Another expression of Iran’s rethinking regarding its nuclear doctrine appeared in remarks by the Leader’s adviser and former defense minister, Ali Shamkhani, who said in an interview on Iranian television that if he could return to the 1990s, when he served as defense minister in the government of President Mohammad Khatami, he would support the development of a nuclear bomb. According to him, the war proved that Iran should have equipped itself with nuclear weapons.<sup>49</sup>

An article that appeared on the *Iranian Diplomacy* website (and has since been removed) likewise argued that the only way to prevent another attack was the rapid unveiling of a nuclear weapon. Even if the 400 kilograms of uranium enriched to 60% were destroyed in the strikes, the article’s author, Mohammad Monsan, argued that Iran should declare that it had obtained a nuclear weapon—even implicitly. The article stated that global experience

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47 “Iranian lawmakers urge review of defense doctrine, call for nuclear weapons.” *Iran International*, September 22, 2025. <https://tinyurl.com/tudpmz7m>

48 Ahmad Naderi’s X (Twitter) account, September 19, 2025. <https://tinyurl.com/t8ww3atc>

49 “Shamkhani: I wish that when I was defense minister, I had pursued nuclear weapons.” *Asr-e Iran*, October 15, 2025. <https://tinyurl.com/593fruav>

demonstrates the power of nuclear deterrence. It cited, among other things, remarks by President Trump during a meeting with Russian President Vladimir Putin in August 2025, in which Trump reportedly said that the United States would not fight a state equipped with nuclear weapons. It also quoted a past observation by former U.S. Secretary of State Mike Pompeo distinguishing between U.S. policy toward North Korea and its policy toward Iran, based on the fact that North Korea has nuclear weapons capable of striking the United States. According to the website, Iran has never fully understood the importance of nuclear deterrence, and continuation of the current policy could lead to further and even more severe attacks.<sup>50</sup>

In early July 2025, President Pezeshkian approved the law suspending cooperation with the International Atomic Energy Agency (IAEA). The law, approved earlier by the Majles and subsequently by the Guardian Council, effectively halted inspections and the submission of reports to the IAEA until the security of Iran’s nuclear sites could be guaranteed.<sup>51</sup> On September 9, 2025, IAEA Director General Rafael Grossi and Iranian Foreign Minister Abbas Araghchi signed an agreement intended to pave the way for renewed IAEA inspections at Iranian nuclear sites.<sup>52</sup> However, following the activation of the snapback mechanism against Iran at the end of September—which reimposed all UN Security Council sanctions lifted under the 2015 nuclear deal—the Iranian foreign minister announced that the Cairo agreement was no longer valid.<sup>53</sup>

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50 “The potential future war will last three to six days, not a war of attrition!” *Atlas Diplomacy*, September 8, 2025. <https://tinyurl.com/4d85dfx3>

51 “After its nuclear facilities were struck by Israel and the U.S., Iran froze its cooperation with the IAEA.” *Haaretz*, July 2, 2025. <https://tinyurl.com/5esv3c7t>

52 “Iran will allow IAEA inspectors to enter its territory.” *Yedioth Ahronoth*, September 10, 2025. <https://tinyurl.com/6wavwbun>

53 “Cairo deal with IAEA ‘no longer valid’ after UN snapback sanctions: Iran.” *TRT World*, October 5, 2025. <https://tinyurl.com/439hm29s>

Although Iran's motivation to obtain nuclear weapons has increased, a decision to breakthrough remains dangerous in light of the possibility of further military action by Israel or the United States, the proven penetration of Western intelligence into the nuclear program, and Israel's (and possibly America's) resolve to use force again—potentially even at the risk of threatening the regime's survival—to prevent Iran from rebuilding nuclear infrastructure, let alone achieving a weapon.

In light of this dilemma, a public debate has emerged in Iran since the end of the war regarding the possibility of adopting a policy of nuclear ambiguity—avoiding the release of official information about Iran's nuclear capabilities. As with other contentious issues, this topic has sparked disagreement between conservative circles and more pragmatic ones. Commentator Hamid-Reza Esmaeili Nejad argued in an article on *Iranian Diplomacy* that the most recent war proved the time had come for Iran to withdraw from the Nuclear Non-Proliferation Treaty (NPT) and adopt a policy of nuclear ambiguity. According to him, the restrictions Iran accepted under the 2015 nuclear agreement neither resolved the crisis nor prevented an attack against Iran, contrary to international law. Therefore, Iran must act without fear and in accordance with its national interest: withdraw from the treaty and adopt ambiguity as a bargaining chip and instrument of pressure in future negotiations with the Trump administration.<sup>54</sup>

Journalist and commentator Nejad Mohammad Ali also proposed adopting a policy of ambiguity: ending cooperation with the IAEA, refraining from publishing information on the extent of the damage to Iran's nuclear program, and creating doubts among adversaries regarding Iran's nuclear capabilities—doubts that could strengthen Iranian deterrence. In his view, when IAEA cameras become tools of espionage and the information Iran provides is used for assassinations of nuclear scientists, transparency is not an advantage

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54 “The time has come to withdraw from the NPT and adopt a policy of nuclear ambiguity. *Iranian Diplomacy*, July 6, 2025. <https://tinyurl.com/58ss8nsk>

but “intelligence suicide.” Therefore, ambiguity should be preferred, as it would deter the enemy by generating concern that Iran is close to nuclear breakthrough—or may have already crossed the threshold. Ambiguity, he argued, can serve as a weapon in Iran’s hands and also assist diplomacy by compelling the other side to act cautiously and avoid dictating demands.<sup>55</sup>

In contrast, voices within the pragmatic camp warned of the dangers involved in adopting a policy of nuclear ambiguity. The reformist daily *Shargh* cautioned that such a move—intended to compel the West and Israel to refrain from further attacks and to extract concessions in negotiations—might produce the opposite result. The paper cited two test cases: Iraq and Libya. Iraq, which chose ambiguity regarding its unconventional capabilities after the 1991 Gulf War and refused to cooperate with IAEA inspectors, aroused the suspicion of the United States and its allies, leading to the American invasion in 2003. Libya denied the existence of a nuclear program, though it hinted at it while advancing the program covertly, and ultimately was forced to admit to it and agree to dismantlement eight months after the U.S. invasion of Iraq. The paper warned that in Iran’s case too, a policy of ambiguity could lead to instability, prolonged low-intensity conflict, or even the resumption of full-scale war. Unlike North Korea, which could afford ambiguity until its 2006 nuclear test, Iran operates in the heart of a volatile region, is in direct confrontation with Israel, and lacks significant counterintelligence capabilities that would allow it to maintain ambiguity over time.<sup>56</sup>

At this stage, there is no evidence of Iranian efforts to rebuild the three key nuclear facilities damaged in the attacks (Natanz, Fordow, and Isfahan) or to breakout toward a nuclear weapon. In late October 2025, IAEA Director General Rafael Grossi reported that Iran was not enriching uranium at that time, but added that inspectors had recently detected activity around the sites

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55 “Iran’s nuclear-ambiguity strategy in the face of espionage and aggression. *Seday-e Sima*, July 3, 2025. <https://tinyurl.com/58ss8nsk>

56 “Strategic nuclear ambiguity?” *Shargh*, July 2, 2025. <https://tinyurl.com/2u6ub33u>

where Iran's remaining stockpile of 60%-enriched uranium is held.<sup>57</sup> Satellite imagery published by the Institute for Science and International Security (ISIS) in August 2025 revealed significant Iranian efforts to quickly demolish structures damaged or destroyed at the Mojdeh site (Lavisian-2), located near Malek Ashtar University in Tehran, which was bombed twice during the war. According to the Institute, the clearing and demolition activities were intended to limit access for future inspections aimed at uncovering evidence of weapons-related research and development.<sup>58</sup> Satellite images from late September 2025 revealed renewed activity at the tunnel complex in Isfahan, which was struck during the war. The activity included clearing debris and removing rubble from two of the three entrances to the complex using heavy machinery—apparently to allow controlled access and to reinforce the entrances against possible future attacks. However, the activity did not indicate the removal of centrifuges or enriched uranium stockpiles from the site.<sup>59</sup>

Satellite imagery released in September 2025 revealed even more troubling developments: Iranian activity aimed at accelerating construction at an underground site in “Pickaxe Mountain” (Kuh-e Kolang Gazleh), intended to serve as a centrifuge-assembly facility. The images showed heavy machinery and clear evidence of expanded construction and security measures at the site, which may be used as a center for centrifuge development or for storing enriched uranium. Among other things, Iran appears to be reinforcing its engineering defenses there—using concrete, strengthening tunnel openings,

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57 Farnoush Amiri, “Iran isn’t actively enriching uranium but movement detected near nuclear sites, UN official tells AP.” *Associated Press*, October 29, 2025. <https://tinyurl.com/yc5ky32d>

58 David Albright, Sarah Burkhard, Spencer Faragasso, and the Good ISIS Team, “Imagery shows sanitization effort at the attacked Mojdeh site a.k.a. the ‘Lavisian 2’ Campus.” *Institute for Science and International Security*, August 27, 2025. <https://tinyurl.com/4tdvjz5y>

59 David Albright, Sarah Burkhard, Spencer Faragasso, and the Good ISIS Team, “Imagery update on the Esfahan Tunnel Complex.” *Institute for Science and International Security*, October 16, 2025. <https://tinyurl.com/mrdvjnfm>

and expanding excavation work.<sup>60</sup> This activity may indicate an intention to increase protection of the assets remaining at the facility or to gradually render it operational for new capabilities, including enrichment.<sup>61</sup>

Construction activity was also detected at the Taleghan-2 nuclear research site in the Parchin military complex, which was struck by Israel on October 25, 2024. The Institute for Science and International Security assessed that Iran had covered two of the buildings in the compound with earth, apparently to increase their survivability in the event of future Israeli strikes.<sup>62</sup>

Nevertheless, Iran has so far refrained from carrying out its threats to withdraw from the NPT following the activation of the snapback mechanism, even though it is not allowing IAEA inspections at the damaged nuclear sites and is not providing information about the fissile material that remains in its possession. These threats have largely lost operational significance given the extensive damage to the nuclear sites and Iran's refusal to resume IAEA monitoring. In October 2025, Mohammad Eslami, head of the Atomic Energy Organization of Iran (AEOI), stated that withdrawal from the treaty was not on the government's agenda. He added, however, that Iran would not resume cooperation with the IAEA unless the agency met two conditions set by the Majles: condemning the attack on Iran's nuclear facilities and committing to protect all information related to Iran's nuclear industry.<sup>63</sup> Still, it cannot

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60 David Albright, Sarah Burkhard, Spencer Faragasso, and the Good ISIS Team, "Update on Iran's Mountain Facilities South of the Natanz Enrichment Plant." *Institute for Science and International Security*, October 3, 2025. <https://tinyurl.com/6p7dx9jy>

61 Joseph Rodgers and Joseph Bermudez, "CSIS satellite imagery analysis reveals possible signs of renewed nuclear activity in Iran." *Center for Strategic and International Studies*, October 27, 2025. <https://tinyurl.com/3chwy7ty>

62 David Albright, Sarah Burkhard, Spencer Faragasso, and the Good ISIS Team, "New construction identified at Taleghan 2, a former AMAD plan nuclear weapons development site." *Institute for Science and International Security*, October 20, 2025. <https://tinyurl.com/ykekpvyv>

63 "Eslami: Withdrawal from the NPT is not on the agenda." *Fararu*, October 15, 2025. <https://tinyurl.com/5anc365y>

be ruled out that Iran may eventually decide to leave the NPT as a final step before conducting a nuclear test, once all necessary preparations for a breakout are complete.

In any case, Iranian officials have emphasized that the authority to decide on withdrawal from the NPT belongs exclusively to the Leader and the Supreme National Security Council. Former AEOI head Ali Akbar Salehi stated that the decision rests solely with the Leader.<sup>64</sup> Member of parliament Esmail Kowsari similarly stressed that the final decision lies with the Supreme National Security Council, and that Iran has a variety of legal and political options in response to the snapback.<sup>65</sup> Meanwhile, figures associated with the pragmatic camp warned of the consequences of such a withdrawal. In their view, the uncompromising approach of the radical factions has already caused Iran significant damage, and steps such as exiting the treaty would only worsen Iran's situation and turn it into an isolated state—similar to North Korea.

Former chairman of the Majles National Security and Foreign Policy Committee, Heshmatollah Falahatpisheh, argued that leaving the NPT would only provide Iran's adversaries with excuses to escalate sanctions and military pressure. He added that the proposals put forward by radical Iranian elements differ little from those advocated by Benjamin Netanyahu and his supporters, and that the Iranian people would ultimately pay the price for their implementation.<sup>66</sup> The reformist daily *Shargh* likewise warned that withdrawing from the treaty, halting cooperation with the IAEA, or even closing the Strait of Hormuz—as demanded by some hardline factions—would not change the fundamental dynamics of the nuclear issue and would only heighten tensions with the West. According to the paper, advancing such

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64 “Only Khamenei can decide on Iranian exit from NPT, former official says.” *Iran International*, August 29, 2025. <https://tinyurl.com/yeweeav2>

65 “Parliament to back NPT withdrawal following snapback.” *Tehran Times*, September 3, 2025. <https://tinyurl.com/j46my24t>

66 Falahatpisheh: Leaving the NPT and closing the Strait of Hormuz are no different from Netanyahu's plans. *Fararu*, August 30, 2025. <https://tinyurl.com/ynz33x65>

ideas increases pressure on the government, intensifies internal polarization, and reduces the likelihood of future negotiations—at a time when Iranian citizens are already suffering from the severe economic crisis.<sup>67</sup>

Meanwhile, the question of whether to resume negotiations with Washington on a nuclear agreement—talks that were interrupted on the eve of their sixth round by the Israeli attack—remains unresolved, and it appears that the two countries continue to exchange messages. It is unclear whether Iran is interested at this stage in returning to a negotiated framework, certainly not one that would require concessions perceived in Tehran as capitulation to American dictates, chiefly the elimination of enrichment on Iranian soil and limits on its missile program. From Iran’s perspective, the American insistence on imposing significant restrictions on the nuclear and missile programs amounts to demands for total surrender.

AEOI head Mohammad Eslami emphasized in an interview with Sky News that Iran needs high-level enrichment for sensitive equipment and precision measurement systems that no country is willing to sell to it.<sup>68</sup> Moreover, it is doubtful that Iran would accept an intrusive inspection regime by the IAEA, which Iranian officials accuse of collaborating with Israel and the United States and of providing the basis for attacks on Iranian facilities. It is also unclear whether Iran’s Leader is willing to return to the negotiating table with the American administration, which he believes deceived Iran and proved once again that it cannot be trusted. In his view, the war only strengthened his conviction that Iran’s nuclear and missile programs serve merely as a pretext for the United States to weaken and subdue Iran. Nevertheless, Khamenei may agree to resume negotiations—and even to a political arrangement—under certain conditions, including guarantees that Iran will not be attacked

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67 “Withdrawal from the NPT: Deterrence or Isolation?” *Shargh*, September 3, 2025. <https://tinyurl.com/mryy22pn>

68 Alistair Bunkall, “Some of Iran’s nuclear facilities were ‘destroyed’ by US strikes, nuclear chief admits.” *Sky News*, September 24, 2025. <https://tinyurl.com/ye2y78vm>

again, significant economic relief through extensive sanctions easing and the release of frozen Iranian assets abroad, and possibly to buy time (perhaps until the end of President Trump's term).

A particularly dangerous scenario would be Tehran's adoption of a diplomatic track as a ruse—its purpose being to mask parallel progress toward a bomb through a covert program (the North Korean model). In any case, at this stage it appears that the maximum concessions Iran is prepared to offer in negotiations with the United States do not match even the minimum concessions the Trump administration is willing to accept.

Meanwhile, Iran continues to advance its civilian nuclear program in cooperation with Russia. Russia's official position remains opposed to Iranian nuclear-weapons development, yet it is willing to assist Iran in constructing nuclear power plants. In September 2025, Iran announced a massive \$25-billion deal under which the Russian nuclear corporation Rosatom is expected to build four new nuclear reactors in the coming years, similar to the Bushehr reactor constructed by Russia and operational since 2010.<sup>69</sup> In early October 2025, a Russian delegation led by Nikolai Spassky, Rosatom's Deputy Director General for International Relations, visited Tehran and held detailed discussions with senior officials of the Atomic Energy Organization of Iran on a wide range of nuclear topics, including expanded cooperation on the development of small modular reactors and the construction of 1,250-megawatt reactors. During the visit, it was decided that Rosatom CEO Alexei Likhachev would travel to Iran in the near future to closely monitor progress on the construction of the second and third units at the Bushehr plant.<sup>70</sup>

As of this writing, it appears that fear of an Israeli–American response is leading the regime—at least for now—to prioritize the restoration and

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69 “Iran and Russia sign \$25 billion agreement to build four nuclear power plants in Iran, IRNA says.” *Reuters*, September 26, 2025. <https://tinyurl.com/5n8kxdw8>

70 “Extensive talks between Iran and Russia on developing small-scale nuclear reactors.” *Mehr News Agency*, October 9, 2025. <https://tinyurl.com/474mwpd5>

improvement of its missile forces, air defenses, and civil-defense preparedness over the breakout to nuclear weapons. Lacking good options for escaping the current crisis, Tehran is trying to buy time by avoiding provocative steps and maintaining nuclear ambiguity through limiting IAEA inspections and withholding information on the nuclear capabilities that survived the war. However, it is doubtful that the current status quo can hold for long, especially given the heavy economic price Iran continues to pay and the danger of miscalculation vis-à-vis Israel.