



The Cambridge Security Initiative

**IRAN: WHAT IF THE JCPOA COLLAPSES?
TEHRAN IS UNLIKELY TO WEAPONIZE, AT LEAST FOR NOW**

DECEMBER 2020

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Negotiations between Iran and the signatories of the 2015 Joint Comprehensive Plan of Action (JCPOA) resumed on 29 November but a deal whereby Washington and Tehran return to full compliance with the agreement remains in doubt for a number of reasons, not least of which is significant advances in Tehran's nuclear program. If the talks collapse, Iran is unlikely to move rapidly toward building and testing a weapon; it is more likely to pursue a policy of nuclear ambiguity while continuing or even accelerating toward a threshold/break out capability.

The talks between Iran and the P5+1 signatories — the UK, France, Germany, Russia and China, along with the EU — resumed in Vienna on 29 November. As in the first six rounds, the US is participating but there are no direct talks between Iranian and US representatives. This is first round of talks since June and the election of hard-line Iranian President Ibrahim Raisi. Iran's new lead negotiator is Ali Bagheri Kani who is close to the Supreme Leader and has historically been hostile to the agreement.

Iran has cast this round of talks as solely about the lifting of sanctions, at least publicly. Tehran has demanded the US lift all sanctions imposed since President Trump left the deal in 2018, including those not related to the JCPOA. It has also demanded that Washington guarantee no future administration will leave the deal, an unacceptable demand; one administration cannot bind another or the Congress to such a commitment absent a treaty ratified by the two-thirds of the US Senate. Iran has indicated it will reverse its nuclear advances and return to the limits imposed by the JCPOA only after it has verified the lifting of sanctions.

For its part, Washington continues to demand simultaneous return to compliance by both sides and is warning it will not allow the talks to continue indefinitely. It also sees a renewal of the accord as a precursor to a new "longer and stronger" agreement that addresses Iran's ballistic missile program, its support for

terrorism and regional proxies, and the sunset provisions in the JCPOA. Tehran has categorically rejected any further negotiations that limit its missile arsenal or its regional activities.

The US and the E3 — UK, France, Germany — remain highly concerned about Iranian nuclear advances. Tehran has moved rapidly since May 2019 to advance its nuclear program in violation of the JCPOA's provisions, bringing it closer to a threshold capability. Iran is enriching uranium to 20% and 60% (near weapons grade), stockpiling heavy water, developing and employing advanced centrifuges including at the deeply buried Fordow facility, and producing uranium metal, a key component of a nuclear weapon. The E3 recently issued a joint statement noting, "Iran has continued its systematic nuclear escalation, thereby permanently and irreversibly upgrading its nuclear capabilities and exposing the international community to significant risk."

Meanwhile, Tehran continues to stonewall the IAEA. At the 24-26 November Board of Governors meeting, IAEA Director Rafael Grossi stated his negotiations in Tehran days prior were "inconclusive." Iran still refuses to provide credible responses to the IAEA regarding traces of uranium found at three sites. It also continues to deny the IAEA access to camera footage monitoring its activities, and to refuse access to the centrifuge production facility at Karaj. Grossi asserted that the IAEA is "close to the point" where it will be unable to guarantee "continuity of knowledge."

What if the Talks Collapse?

It remains unclear if Iran is willing to return to compliance with the JCPOA. Tehran certainly wants the US to lift sanctions to ease its dire economic conditions, but continues to balk at returning to the limits imposed on its nuclear program. Nevertheless, Iran is unlikely to move rapidly to weaponize and conduct a nuclear weapons test if the talks collapse. Instead, Tehran probably will accelerate its move toward a threshold capability that would allow it to build a weapon within a short time period — probably months — leaving open the possibility of a dash to a weapon in the event it is threatened or the strategic environment changes in a way that increases its threat perception.

To reach a threshold capability, Tehran probably will step up its enrichment activity to accumulate increased quantities of highly enriched uranium, at some point enriching to weapons grade (90%). Tehran will also need to develop a functional warhead design — assuming it doesn't have one already — as well as the ability to mate a warhead to a delivery system, probably a medium-range ballistic missile such as the Shahab-3. It probably will proceed carefully and surreptitiously toward these capabilities to avoid an attack; the intent would be to create sufficient ambiguity about the program while continuing to denounce nuclear weapons and insist it will never build a weapon. In an effort to keep its advances secret, Tehran probably will terminate its cooperation with the IAEA rendering monitoring of the program more difficult; it may also withdraw from the nuclear Non-Proliferation Treaty.

Iran is unlikely to test a nuclear device absent a clear and present threat, calculating such an overt move would be met with widespread international opprobrium, thrust it further into international pariah status,

spark the reimposition of widespread international sanctions, and undermine its objective of emerging as a respected regional power. Additionally, Tehran may assess testing a weapon would lead to an attack by the US and Israel.

Tehran favors ambiguity and gray-zone conflict, and is unlikely to adopt measures that would lead to a potential regime-ending military campaign. Iranian leaders probably calculate ambiguity and a threshold capability put it in the most advantageous position: protection from an attack, maximum leverage with its neighbours and the broader international community, and the ability to support its proxies and engage in destabilizing regional activity with impunity.

That said, an Iranian policy of deliberate ambiguity will make it more difficult to assess the state of the program and discern whether it is moving toward weaponization, increasing the risk of a preventive attack. Indeed, both the US and Israel have been adamant that Iran never obtain nuclear weapons and have hinted that the military option will be on the table should the talks collapse.

Although the US and Israel probably see an attack on Iran's program as a last resort option, tensions in the region almost certainly will spike in the event the talks collapse, increasing the chances of escalation. Israel probably will opt to step up its covert campaign against the Iranian nuclear program while it simultaneously prepares the Israeli Defense Forces for a strike. In a joint appearance with his Israeli counterpart, US Secretary of State Antony Blinken said the US and Israel were exploring other options, a thinly veiled reference to a military strike.

The collapse of talks will put Iran on the one hand and the US, Israel and the West on the other on a collision course, to be sure, but it is unlikely to lead to a nuclear-armed Iran, at least for the near term. Instead, the confrontation will play out in different arenas, in regional conflicts fueled by Iran-backed proxy forces in Lebanon, Syria, the Gaza Strip, Iraq, and Yemen, and possibly in the maritime domain. Even if there is a deal, it will only delay Iran's advances toward a breakout capability and it is highly unlikely to lead to regional stability. As in 2015, Iran will pocket the economic windfall of sanctions relief and step up its support to proxies, inflaming the myriad conflicts in the region and exacerbating instability.