

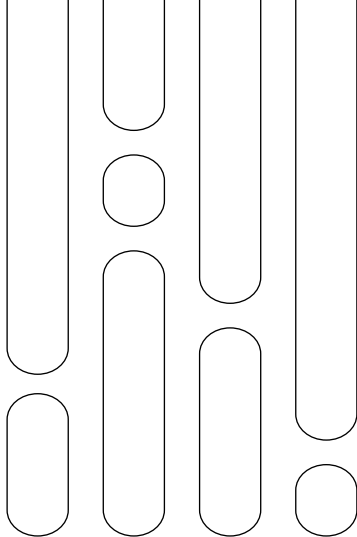
REPORT

IRAN'S URANIUM DEAL WITH NIGER: A US-IRAN FACE-OFF IN A NEW ARENA

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Despite the military coup in July 2023 against Western-backed President Mohamed Bazoum, the United States maintained its relations with Niger. However, a dispute has emerged between the two sides, with Iran being the focal point. The United States accused the ruling military junta in Niger of striking a deal that would grant Iran access to some local uranium reserves. Despite Niger's denial, some Western intelligence agencies claimed to have obtained confirmed information about the deal. They asserted that the Nigerien military council had reached an initial agreement with Iran, and consultations were underway to expedite the enforcement of this preliminary [agreement](#). These developments have heightened concerns for the United States and its European allies. There are fears that Iran gaining access to significant quantities of uranium, free from supervision and sanctions, could bolster its nuclear program. Additionally, it could strengthen Iran's presence in the Sahel region, which is currently grappling with unrest and chaos, thereby threatening US influence in the region. The truth of this deal, its importance, and its implications remain subjects of ongoing scrutiny and analysis.

The Uranium Deal and the Parties' Positions

Rumors of a uranium deal between Iran and Niger surfaced following a [visit](#) by an American delegation led by the US Assistant Secretary of State for African Affairs Molly Phee to Niger in mid-March 2024. During the visit, the US delegation urged Niger to refrain from proceeding with the deal being negotiated with Iran, which would grant Iran access to some of Niger's uranium reserves. According to US sources, talks between Tehran and Niamey had reached an advanced stage by February 2024, with the two parties having already signed an initial agreement permitting Tehran to acquire uranium.

Looking back, it is notable that Iran's relationship with Niger saw an improvement since mid-2023, following the military coup that ousted President Mohamed Bazoum. This coup took a hostile stance towards France and the West, subjecting the new regime to intense international and regional pressure. Iran seized this opportunity to recalibrate its ties with Niger. On October 25, 2023, Iranian President Ebrahim Raisi welcomed Nigerien Foreign Minister Yaou Sangaré

Bakary in Tehran, where Iranian officials expressed readiness to expand cooperation with Niamey. Subsequently, Ali Mehman Lamine, the prime minister appointed by the military council in Niger, [visited](#) Iran in January 2024. According to sources, discussions during this period may have included negotiations on the uranium deal between the two countries.

Iran has long sought to access uranium imports from abroad, successfully obtaining it from various sources over the years. Notably, it secured uranium from South Africa in the early 1980s and from Russia in 2015. Tehran also attempted to purchase uranium directly from Kazakhstan on multiple occasions, although Western pressures thwarted these efforts. Niger's uranium [holds](#) particular interest for Iran, as it ranks seventh globally in uranium production according to 2022 statistics, with production reaching approximately 2020 metric tons, as reported by the World Nuclear Association. During Ahmadinejad's presidency, Iran sought to finalize a deal with Niger to acquire raw uranium, driven by the depletion of its own uranium reserves and the need for external sources to sustain its nuclear activities. However, these efforts were stymied by US surveillance and other countries' reluctance to cooperate with Iran in this sensitive area, as prohibited by a Security Council resolution.

Iranian Objectives as Part of the Mutual Escalation With the United States

With the political shift observed in Niger's foreign policy, moving away from Western alignment, Iran perceives an opportunity to bolster its influence in the country and fulfill its longstanding aspiration of accessing Niger's uranium reserves. The primary objectives for Iran in this potential deal include:

- **Maintaining the policy of expanding nuclear energy production:** Iran's nuclear energy production is on a continuous expansion trajectory. In early February 2024, it announced the construction of four additional nuclear power plants in the coastal province of Hormozgan in the south, with an anticipated combined capacity of 5,000 megawatts. Iran's demand for uranium has been

substantial, with a reported need of 160,000 tons in 2020, the latest data submitted to the International Atomic Energy Agency (IAEA). Looking ahead, Iran aims to ramp up its nuclear energy output to 20,000 megawatts by 2041. However, its current production capacity is only up to 80,000 tons by 2025, indicating a significant shortfall. Securing large quantities of uranium, such as through the potential deal with Niger, could potentially bridge this gap in Iran's nuclear energy requirements.

■ **Hedging in light of the nuclear diplomacy failure:** The potential deal holds significant importance for Iran due to its need for sustainable sources of uranium imports, especially in light of US sanctions. This necessity arises from Iran's pursuit of a policy of nuclear escalation following the US withdrawal from the nuclear agreement in May 2018. According to the latest [report](#) from the International Atomic Energy Agency (IAEA) in February 2024, Iran has been able to increase its production of weapons-grade uranium at an accelerated pace, facilitated by a growing stock of enriched uranium and expanded enrichment capacity. This trend suggests Iran's progression towards the nuclear threshold. Simultaneously, the deal is viewed as a strategic precautionary measure amid the diplomatic impasse and uncertainty surrounding the nuclear agreement. Iran may be preparing for worst-case scenarios, including the collapse of existing understandings with the Biden administration and its European allies, particularly if there is a shift in US policy towards a stance similar to that of former President Trump, known for his adversarial approach towards Iran and reluctance to rejoin the nuclear agreement.

■ **Pursuing the approach of confrontation with the United States:** Undoubtedly, the strategy of cultivating relations with anti-US entities has long been a central tenet of Iranian foreign policy, rooted in its ideological orientation and commitment to challenging hegemonic powers. Therefore, it comes as no surprise that Iran is actively seeking to bolster its influence and foster ties with the new regime in Niger, as well as with nations in the Sahel region. This region has experienced military coups and witnessed a rising wave of opposition to the US and Western presence. Iran aims to capitalize on strained relations

between the West and these emerging governments, aligning itself with anti-hegemonic tendencies and resistance against perceived new colonial powers. This maneuver aligns with Iran's broader objectives of countering isolation, distancing itself from Western influence, and creating avenues for economic cooperation to mitigate the impact of sanctions. Moreover, the Sahel region's current state of chaos, the proliferation of armed groups, and local conflicts present a conducive environment for Iran to advance its foreign policy agenda.

■ **An alternative investor for France in the uranium fields:** The [majority](#) of uranium produced by Niger is exported to France, its former colonial power, where the state uranium company, Orano, operates in partnership with a Nigerian government-owned company. However, as relations between Niger and France have deteriorated, Iran may see an opportunity to step in as an alternative investor in Niger's uranium fields. Concurrently, the Military Council in Niger, seeking to distance itself from France and the West, may view Iran as a viable alternative partner. Both regimes currently share antagonistic attitudes towards the West, making Iran a potentially attractive option for Niger as it seeks to recalibrate its international relationships.

The Impact of the Iranian Presence in the Sahel and the Future of the Uranium Deal

Following Niger's immediate [cancellation](#) of its military agreement with the United States, which permitted US military personnel to operate within its territory, there is a potential for enhanced mutual trust between Niger and Iran, potentially facilitating progress on the uranium deal. This move may also pave the way for Iran to expand its influence in the broader region through cooperation with neighboring countries. With Russia and China, both adversaries of the United States, having a presence in the region, particularly in Niger and the Sahel, it could prove challenging for the United States to counterbalance the influence of Iran and Russia effectively. Iran's involvement in this geopolitical arena could serve as a leverage point against US interests and provide a platform for exerting indirect influence, particularly given the presence of violent extremist groups in the region. These groups may exploit the instability to engage in

arms trafficking or clandestine intelligence activities. Additionally, the Sahel region could become a new battleground for regional conflicts, offering opportunities to circumvent sanctions and undermine US counterterrorism efforts.

Completing the uranium deal between Tehran and Niamey owes much to the current turbulent international landscape. Both Iran and Niger have capitalized on the decline of US influence on the global stage and ongoing confrontations in various arenas. Tensions with Russia in Ukraine and with China in Southeast Asia have contributed to a polarized international environment, enabling medium and small countries to diversify their partnerships and evade US restrictions and sanctions. This shifting dynamic has provided an opportune moment for Iran and Niger to forge closer ties and move forward with the uranium deal. However, several anticipated scenarios surround this deal; among the most significant are the following:

▪ **Concluding the deal and losing control over Iran's nuclear program:** This scenario suggests that Iran and Niger will proceed with implementing the deal, thereby challenging the United States and potentially enabling Iran to access uranium in Niger. This could lead to Iran replacing or at least competing with France, Niger's primary partner in uranium extraction. Such a development would exploit existing gaps, notably in Iran's safeguards agreement with the IAEA. Under this agreement, Iran is only required to inform the agency of imports of extracted and ground uranium products, not uranium ore, representing a loophole in oversight, particularly given Iran's restrictions on the UN watchdog's monitoring of its nuclear activities amid the failure to revive the nuclear agreement. This scenario also aligns with the inclinations of the ruling military junta in Niger, seeking to diversify partnerships to reduce reliance on Western influence. Russia may support this deal to challenge further US and Western dominance in Africa, particularly the Sahel region. If completed, the deal would be a strategic victory for Iran, weakening the impact of sanctions and granting vital influence in the Sahel region. However, such moves by Tehran risk crossing red lines for Washington and Israel, potentially escalating tensions, especially

if Iran is perceived to be accelerating its pursuit of nuclear weapons through this agreement.

▪ **Keeping Iran's nuclear moves in check:** This scenario suggests that the United States could successfully thwart the Iran-Niger deal by imposing additional sanctions and pressure on Niger or threatening Iran with further escalatory measures. Such an outcome would likely compel Iran to expand its nuclear program, frustrating US monitoring efforts and tightening the sanctions regime. Ultimately, this could fuel a nuclear arms race in the region, contrary to US interests, as it would diminish its regional influence. Moreover, the ruling military junta in Niger may prioritize maintaining relations with Washington over completing the deal with Iran. Additionally, Iran's behavior regarding nuclear escalation likely has limits, as it prioritizes regime survival and avoiding existential threats. Furthermore, Iran's technological and economic capabilities may not offer the most attractive alternative for France and the West in uranium extraction processes.

In addition, returning to the nuclear agreement at any stage could alleviate concerns related to the Iran-Niger deal by reinstating Iran's commitment to the IAEA's stronger inspection agreement, known as the Additional Protocol. This would enhance the agency's ability to monitor key activities within Iran's nuclear fuel cycle, potentially curbing Tehran's expansion of enriched uranium production for nuclear weapons. Additionally, US [pressure](#) on Niger to halt the deal's implementation remains a significant factor. It is important to note that Niger abides by the safeguards agreement of the Treaty on the Non-Proliferation of Nuclear Weapons, obligating it to report its exports of uranium ore to Iran. Moreover, UN Security Council Resolution 2231 stipulates that potential suppliers of uranium to Iran must seek prior approval from the UN Security Council, further complicating the deal's prospects.

Conclusion

The uranium deal reportedly being expedited by Iran and Niger represents a crucial step in Iran's quest to secure its raw uranium requirements, potentially bolstering its nuclear capabilities and

circumventing Western restrictions on its nuclear program. It also serves as a significant diplomatic leverage amid stalled negotiations to revive the nuclear agreement. Moreover, it aligns with Iran's broader strategy under President Raisi to expand its influence beyond its immediate regional sphere, particularly in Africa. However, this move could invite heightened scrutiny and resistance from the United States, given its adamant stance against Iran acquiring nuclear weapons. Additionally, Iran's expanding international ambitions may clash with US interests, particularly as it intersects with the objectives of Russia and China to challenge US influence globally. As a result, the United States may perceive Iran's growing assertiveness as a threat that needs to be addressed.



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