

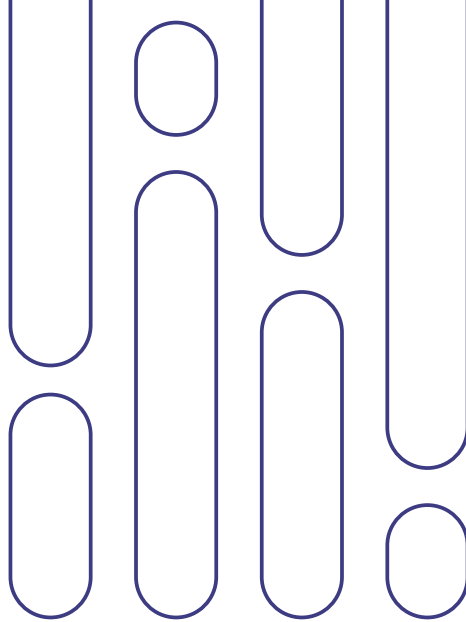
REPORT

The Iranian Nuclear Program at a Crossroads: Potential Trajectories Following Grossi's Visit

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CONTENTS

Critical Juncture	3
Mutual Stakes.....	6
Potential Results and Trajectories	9
Conclusion	11

Secretary-General of the International Atomic Energy Agency (IAEA) Rafael Grossi embarked on a visit to Iran on May 6, 2024, marking his first official trip since March 2023. His presence was prompted by the inaugural international nuclear conference focusing on Iranian nuclear science and technology, held in Isfahan, central Iran. The conference aimed to foster cooperation on international oversight of Iranian nuclear sites, a role that has been largely sidelined amid Tehran's scaling back of its nuclear commitments following the US withdrawal from the nuclear agreement. Efforts to reinstate oversight have faced hurdles since Joe Biden assumed the US presidency in early 2021. Grossi's visit, in this context, holds particular significance as it precedes the upcoming Board of Governors meeting in early June 2024, during which he is expected to deliver a comprehensive report on developments in the Iranian nuclear file. This report aims to shed light on the significance of Grossi's visit, the implications it holds, and its potential impact on Iran's nuclear trajectory in the forthcoming phase.

Critical Juncture

Grossi's visit is of paramount significance due to its timing amidst the ongoing developments in Iranian nuclear activities. Several factors contribute to the critical nature of this juncture:

- **Enrichment levels significantly surpassing peaceful purposes:** There is growing concern over Iran's nuclear ambiguity policy, particularly due to its capability to enrich uranium to 60%, a level close to the 90% threshold required for military purposes. Notably, Iran stands out as the only nation without nuclear weapons considering the fact that it possesses the afore-

said enrichment capacity and has accumulated substantial uranium stockpiles. This stands in stark contrast to the 3.67% limit set by the 2015 nuclear agreement, designed for electricity production, a threshold Iran has surpassed since 2021. Iran's policy unfolds against a backdrop of reduced inspections, disconnection of surveillance cameras, and revocation of accreditation for a group of experts. Concurrently, Iran continues to bolster its enriched uranium stockpile.

- **Iranian noncompliance:** Despite the UN watchdog's efforts to maintain monitoring activities through a March 2023 agreement, it encountered significant hurdles. Iran's failure to uphold its commitments, coupled with the politicization of oversight, exacerbated by tensions with the United States and stalled nuclear negotiations, posed formidable challenges. Consequently, the [UN watchdog](#) lost crucial continuity of knowledge regarding centrifuge production, heavy water, and uranium ore concentrates in Iran. Prior to his visit, Grossi voiced his frustration with this situation, highlighting the lack of clarity regarding Iran's enrichment activities. He emphasized the absence of explanations from Iran regarding the necessity, quantity, and pace of enrichment, further compounded by the discovery of highly enriched uranium particles at two sites. These findings cast doubt on Iran's nuclear intentions, heightening concerns and underscoring the urgency of addressing the aforesaid unresolved issues through diplomatic channels.

- **Concerns about targeting Iran's nuclear installations:** Grossi's visit occurs against the backdrop of heightened tensions in the region, exacerbated by ongoing conflicts since Operation Al-Aqsa Flood. The confrontation between Iran and its

allies and Israel and the United States has escalated to unprecedented levels. Notably, Iranian attacks on Israel on April 13, 2024, in retaliation for the Israeli strike on the Iranian consulate in Damascus on April 1 of the same year, further inflamed tensions. Israel's subsequent threats to target Iranian nuclear sites, coupled with Iran's retaliatory warnings, have raised significant concerns for the UN agency. Grossi expressed his dismay at this escalation, underscoring the urgent need for de-escalation and diplomatic solutions to mitigate the risks posed by heightened hostilities.

- **Iran's hints at changing its nuclear doctrine:** As diplomatic efforts to revive the nuclear agreement have waned since the summer of 2022, concerns have escalated among the United States, Israel and the international community regarding Iran's potential exploitation of the current circumstances to advance its nuclear program. This unease is further fueled by recent internal demands and calls within Iran's ruling establishment to develop and possess a nuclear weapon. Of particular note is the statement made by former "hardliner" member of the Iranian Parliament Javad Karimi Ghodousi, suggesting that Iran could test its first atomic bomb within a week if approved by Iranian Supreme Leader Ali Khamenei. This assertion came in the wake of an announcement on March 23, 2024, by a faculty member at the Center for Islamic Sciences Muhammad Fakir Meybodi advocating for Iran's acquisition of nuclear weapons as a modern means of deterring adversaries. In response to these statements, the IAEA's Board of Governors [expressed](#) grave concerns, particularly regarding assertions suggesting Tehran's capacity to manufacture atomic weapons.

Mutual Stakes

Grossi's visit carries significant stakes for both Iran and the IAEA. Here are the key considerations:

- **Grossi counting on the restoration of IAEA inspections:**

The UN agency is hopeful that the current geopolitical pressures may create an opportunity to reinvigorate nuclear cooperation with Iran, which has been on hold for nearly a year. This includes discussions on implementing the March 2023 agreement, [under which](#) Tehran was to cooperate with the agency in investigating uranium particles found in undeclared sites. It also involves granting access to nuclear sites, engaging with relevant personnel, and reinstalling additional monitoring devices that were installed under the 2015 nuclear agreement but removed after its collapse following the US withdrawal in 2018 under then-President Donald Trump. Grossi aims to secure an agreement on these outstanding issues within a month before the next Board of Governors meeting. Grossi's visit to Tehran ahead of the meeting of the Board of Governors is a clear indication of his efforts to ensure that Iran upholds its commitments and agreements with the agency.

- **Iran averting escalation ahead of the Board of Governors meeting:** Iran has a history of employing evasive tactics, time-wasting strategies, and intricate negotiations in its approach to its nuclear program. This includes linking progress on the nuclear program to unrelated issues, making temporary concessions, and withdrawing these opportunistically. Grossi's visit can be viewed within this context. As the IAEA prepares to present its quarterly report during the upcoming Board of Gov-

ernors meeting in Vienna from June 3 to 7, 2024, Grossi's visit may be seen as a maneuver by Iran to [mitigate](#) the anticipated strong criticism from the UN watchdog and soften the severity of the forthcoming report. Iran [aims](#) to prevent the United States and Western powers from leveraging the IAEA's negative stance to escalate the nuclear issue to the Security Council. Its objective is to maintain the nuclear agreement in principle until the expiration of the United Nations resolution in early 2025.

- **Containing the Biden administration's anger:** In recent times, the Biden administration's stance on Iran has undergone a shift. It has come to recognize that the leniency and space afforded to Iran, coupled with the application of pressure and sanctions, have been exploited by Iran to advance its influence and interests rather than fostering engagement and understanding. Consequently, the United States has reimposed sanctions and intensified pressure on Iran through various legislative measures and sanctions, reminiscent of the maximum pressure approach adopted by the Trump administration. These measures include efforts to disrupt oil exports and sanctions targeting Iranian officials, major companies, and industries. In response to this heightened tension, Iran appears to have recalibrated its strategy, welcoming Grossi's visit as a means to alleviate escalating tensions with the United States. A significant source of these tensions is related to disagreements regarding the nuclear file and the impasse in negotiations.

- **Iran averting attacks on nuclear installations:** The Iranian government sees Grossi's visit as an opportunity to address the concerns of international powers. By extending an invitation to Grossi to visit Tehran and resume negotiations, Iran

aims to convey a message of reassurance to Western countries and regional actors disturbed by its nuclear advancements. Additionally, Tehran hopes to avert any potential military action against its nuclear facilities, particularly amidst escalating tensions with Israel and the evolving rules of engagement between the two adversaries. Iran's measured response to the mounting pressure it faces is evident in the statements made by Foreign Minister Hossein Amir-Abdollahian during his meeting with Grossi. He emphasized that Grossi's visit was timely and urged him to adopt neutral and professional positions regarding Iranian nuclear activities, highlighting the importance of effective cooperation in restoring security and stability in the region. Furthermore, Mohammad Eslami, the head of the Atomic Energy Organization of Iran, underscored the necessity for the agency to maintain an unbiased stance unaffected by Israel's claims and its media campaign against Iran's nuclear program.

- **Managing expectations at home:** The recent statements by Iranian officials regarding the country's capability to develop a nuclear weapon quickly have sparked concern among regional and international powers, as well as with the IAEA. Additionally, these remarks have provided an opportunity for "reformist" factions to level significant criticism against the "hardliner" movement that currently dominates Iran's branches of power. In light of these developments, the Iranian establishment aims to utilize Grossi's visit as a means to assert control domestically, mitigate both international and internal criticism, and reaffirm Iran's commitment to the nuclear agreement. The objective is to prevent the exploitation of these statements to undermine the establishment's credibility both domestically and internationally.

Potential Results and Trajectories

Grossi's visit potentially played a role in reviving discussions between the UN watchdog and Iran concerning the nuclear file, aiming to break the deadlock and address lingering technical issues. While both sides had the opportunity to share their concerns during the visit, no new plans were devised to tackle the contentious issues. Both sides confirmed during Grossi's visit that the March 2023 agreement that outlined the checks and balances of the UN watchdog remains in effect and serves as the [foundation](#) for future collaboration and oversight efforts. This confirmation, however, does not introduce any new measures to address the complexities of Iran's nuclear dossier. Consequently, the country's nuclear activities continue without adequate oversight, leading to a steady increase in enrichment levels and the accumulation of enriched uranium. As a result, Iran is edging closer to crossing the nuclear threshold, raising concerns about regional stability and international security.

It appears that addressing the complexities of Iran's nuclear program hinges largely on the political dynamics between Iran and the United States, as well as its concerned allies. Grossi highlighted the presence of political dimensions in these discussions, underscoring that the issue with Iran extends beyond technical considerations within the UN watchdog's purview to encompass political factors and Iran's demands for sanctions relief. Grossi [remarked](#), "When it comes to lifting of sanctions and things like that, which are very important for Iran, I am not the one who has the key to solve these issues," echoing Eslami's assertion that the obstacles to cooperation are predominantly

political. Amidst this uncertain landscape, Iran's nuclear file presents several potential trajectories as follows:

- **Taking the nuclear file back to the UN Security Council:**

If the visit fails to yield progress between the agency and Iran, the forthcoming report to the Board of Governors may cast a negative light, potentially providing the United States and European nations with justification to escalate the matter to the Security Council and potentially reimpose sanctions on Iran. Given this critical juncture, Iran faces a pressing need to deliver a prompt response. Upon arriving in Vienna, Grossi [emphasized](#), "I want results and I want them soon." Concurrently, he conveyed to Abdollahian that enhanced cooperation between Iran and the IAEA could counteract efforts by other parties to escalate tensions in the region. Washington might leverage the IAEA's stance to escalate the nuclear file to the Security Council, undermining the nuclear agreement and imposing further sanctions and pressure on Iran. This could exploit the right of any of the European Troika countries to activate the snapback mechanism, automatically reinstating sanctions on Iran before its effectiveness expires in early 2025.

- **The United States resuming the maximum pressure campaign:** Considering the current failure to persuade Iran to abandon its nuclear policies and its advantage from international developments, alongside China and Russia's opposition to US and Western positions, there is a possibility of not achieving international consensus on referring Iran's nuclear issue to the Security Council. Perhaps the Biden administration's preferred option is to emulate Trump's strategy of implementing the maximum pressure campaign, aiming to intensify pressure on the Iranian government domestically and isolate it internationally. The administration appears to be leaning toward this

path in cooperation with European partners, especially after diplomatic efforts have faltered, particularly in light of escalating regional threats from Iran.

- **Restoring the diplomatic trajectory:** The nuclear issue concerning Iran has evolved into a matter intricately tied to regional and international dynamics, assuming a unique significance. During Biden's tenure, a novel pattern of leniency, understanding and covert trade-offs emerged, indicating the potential for Grossi's visit to align perspectives between Iran and Washington. This could reinvigorate diplomacy, often referred to as the Vienna path, as both sides seek to avoid escalation and confrontation amidst internal and external challenges.

- **A potential Trump comeback:** The outcome of the US elections could significantly impact Biden's approach to the Iranian nuclear issue. However, if Trump secures a return to the White House by the end of 2024, it would mark a pivotal moment for the Iranian nuclear issue. Trump would likely resume his campaign of maximum pressure against Iran and could bolster cooperation with Israel to counter Iranian threats. However, this time, he would be dealing with the "hardliners" in power, who may be willing to alter the nuclear doctrine if their political system faces an existential threat. Nonetheless, the survival of the political system would remain their top priority, potentially leading them to revert to a strategy of strategic patience, avoiding confrontation and nuclear escalation while consolidating their gains.

Conclusion

Grossi's visit provided Iran with a platform to showcase its willingness to engage and negotiate, especially as its nuclear program edges closer to the nuclear threshold without effective

oversight. However, given that the root of the crisis is political, it is unlikely that this visit alone will alter the current situation. Iran sees its nuclear program as a means to safeguard its interests and extend its influence. The Biden administration's approach has inadvertently provided Iran with a historic opportunity to reduce its breakout time, advance its nuclear capabilities, and wield unprecedented leverage. As a result, Iranian officials have become more assertive, indicating a willingness to reconsider the country's nuclear doctrine. There may still be a window of opportunity to dissuade Iran from pursuing a nuclear ideological path by escalating the issue to the Security Council in 2024. Otherwise, the international community may need to prepare for Iran as a nuclear-armed ideological state.

