

Why the Next President Should Start Worrying and Fear the (Iran) Bomb





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Policy Project Members and Staff

Co-Chairs

Ambassador Eric Edelman
Former Under Secretary of Defense for Policy

GEN Charles Wald, USAF (ret.)
Former Deputy Commander of United States European Command

Members

Elliott Abrams
Former U.S. Special Representative for Iran

Lt Gen Henry Obering, USAF (ret.)
Former Director of the Missile Defense Agency

VADM John Bird, USN (ret.)
Former Commander, U.S. Seventh Fleet

Steve Rademaker
Former Assistant Secretary of State for Arms Control and Nonproliferation

Gen James Conway, USMC (ret.)
Former Commandant of the Marine Corps

Maj Gen Lawrence Stutzriem, USAF (ret.)
Former Director, Plans, Policy and Strategy at North American Aerospace Defense Command

Lt Gen David Deptula, USAF (ret.)
Former Deputy Chief of Staff for Intelligence, Surveillance and Reconnaissance, U.S Air Force Headquarters

Ray Takeyh
Senior Fellow for Middle Eastern Studies, Council on Foreign Relations

Larry Goldstein
Founder and Director of Energy Policy Research Foundation, Inc.

Roger Zakheim
Former General Counsel and Deputy Staff Director of U.S. House Armed Services Committee

Lt Gen Charles Moore, USAF (ret.)
Former Deputy Director, U.S. Cyber Command

Staff

Michael Makovsky, PhD
President & CEO

Ari Cicurel
Assistant Director of Foreign Policy

John Hannah
Randi & Charles Wax Senior Fellow

Yoni Tobin
Policy Analyst

Blaise Misztal
Vice President for Policy

Nolan Judd
Executive Assistant to the President & CEO

Jonathan Ruhe
Director of Foreign Policy

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I. Executive Summary

The United States is sleepwalking into a nuclear Iran, having largely ignored this growing problem for years. Tehran has advanced its program so aggressively and assiduously that there is now a high risk it could achieve all the necessary elements of a nuclear weapon, with no certainty the outside world could detect such moves quickly and accurately enough to stop them.

Preventing a nuclear Iran must be a day one issue for the next president. With Iran perched on the nuclear precipice, the next commander-in-chief will enter the White House with no time and little margin for error, as he or she inevitably wades through the demanding processes of staffing a new administration, getting it up to speed, and dealing with myriad other priorities. For that reason, it is highly urgent that both presidential candidates already have a serious, comprehensive strategy to address this threat the moment either of them assumes office in January.

The costs and risks of continued inattention and inaction can easily be gleaned from Iran's escalating nuclear advances in the absence of clear policy, let alone pressure, from the United States. Since President Trump's 2018 decision to leave the JCPOA nuclear deal, the "breakout time" for Iran to produce one bomb's worth of fissile material shrunk from 12 to roughly 3-4 months by the time President Biden took office. After candidate Biden telegraphed his overwhelming desire to address this problem solely via JCPOA reentry talks, with no backup plan, Tehran accelerated its nuclear program before he even took office. Iran then supercharged this drive over the past two years as it became starkly obvious the administration was not willing to pivot to its promised "Plan B" of economic and military pressure. In November 2020, Iran needed a full year to roll out three bombs' worth of fissile material; today it can make that much in a week or two, and thirteen total in just three months.

In parallel, there are growing indications of Iran's capability and intent to "weaponize" the nuclear material it has produced by converting it into a device capable of producing a nuclear explosion. Though the exact extent of progress is unknown to outside observers, American and Israeli officials increasingly indicate their concerns that the regime has inched increasingly close to completing this

crucial step. In a stark departure from past assessments, the U.S. Director of National Intelligence recently warned Iran has undertaken activities that “better position it to produce a nuclear device, if it chooses to do so.”¹

Preventing Tehran from stepping across the nuclear weapons threshold requires dependable and timely detection as a prerequisite to potential action, but Iran has also successfully concealed many of its advances from prying eyes. The closer Tehran has moved to the nuclear threshold, the more it has violated its safeguards agreements with impunity. This makes its ultimate achievement of nuclear weapons capability increasingly undetectable by either the International Atomic Energy Agency (IAEA), which is charged with monitoring Iran’s progress, or national intelligence services – and thus unpreventable. Prevention is complicated further by the fact that many countries’ ultimate decisions about going nuclear involve political as well as technical considerations that may not proceed logically or generate clear intelligence signals. Tellingly, U.S. intelligence has a spotty track record historically of gauging and predicting others’ nuclear progress.

The window for preventing a nuclear Iran will narrow further as these capabilities and uncertainties continue growing – especially if Tehran and other adversaries try to seize on any perceived instability or lack of leadership surrounding the presidential transition in Washington. Staying the course by doing nothing, while repeating tired pledges about “not allowing Iran to acquire nuclear weapons,” will be more freefall than autopilot as Tehran’s ongoing progress further contradicts core U.S. commitments and rings increasingly hollow in the ears of friends and foes around the world. Permitting Iran to continue working its way across this threshold will also embolden it to continue deepening ties with other U.S. adversaries and destabilizing the Middle East, in turn compounding the existing challenges confronting American leadership and credibility in overlapping crises from Europe to the Indo-Pacific.

As Vice President Harris and former President Trump prepare for their first debate tomorrow, JINSA’s Iran Policy Project is issuing this new paper to highlight the need for a focused approach that can actually fulfill America’s longstanding, bipartisan pledges across multiple Presidential administrations to prevent a

nuclear Iran. Showing how the main drivers of Tehran’s remarkable progress toward the bomb are surging into the expanding vacuum of consistent and determined U.S. prevention policy, this paper aims to stimulate pressing, and long overdue, critical thinking about the heavy lifting, tough decision-making, and wider implications involved in countering a problem that both presidential aspirants – and a resounding majority of the American electorate – see as a primary national security threat.² Building from this assessment, JINSA plans to issue a follow-on report with detailed policy recommendations for the incoming administration.

II. Iran’s Nuclear Quantum Leap

Tehran has advanced its program continuously for more than two decades but has recently kicked it into overdrive. Iran is exploiting a years-old vacuum of U.S.-led prevention policy, and its embroilment of Israel in a grinding multifront conflict after October 7, to approach the nuclear weapons threshold unopposed and thus far largely unnoticed.

To be nuclear-weapons capable, Iran needs a bomb’s worth (“significant quantity,” or SQ) of highly enriched uranium, a device capable of using that uranium to produce a nuclear explosion, and a vehicle to deliver such a device on target. Its capacity to produce the first component has expanded profoundly since President Biden’s election – especially since Tehran called his administration’s bluff two year ago about having a serious backup plan if JCPOA reentry negotiations failed.

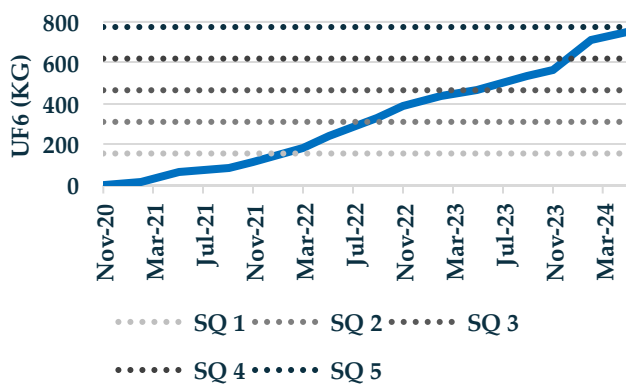
In the past few months, there are also growing indications of the regime’s capability and intent to produce a functional nuclear weapon. And though Iran already possesses nuclear-capable ballistic and cruise missiles as potential delivery vehicles, the October 2023 expiration of a UN Security Council (UNSC) missile embargo – which easily could have been prevented by concerted action by the Biden administration and U.S. allies at the UNSC – certainly eases Tehran’s path to acquire Chinese, Russian, or North Korean technology to improve these systems’ accuracy, range, and survivability. Throughout these developments, Iran

missile embargo – which easily could have been prevented by concerted action by the Biden administration and U.S. allies at the UNSC – certainly eases Tehran’s path to acquire Chinese, Russian, or North Korean technology to improve these systems’ accuracy, range, and survivability. Throughout these developments, Iran has steadily rolled back international safeguards that would help provide accurate and timely detection of its technical advances and any remaining steps to finish a bomb.

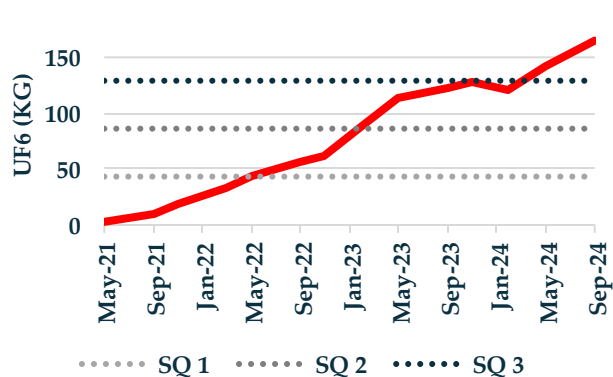
A. Expanding Enrichment Program

In terms of highly enriched uranium, the concern is both in terms of “breakout time” to produce the first SQ, and the number of SQs that could be produced rapidly thereafter. As Secretary Blinken remarked in July, Iran’s breakout time “is now probably one or two weeks” if it decides to make the final leap to 90 percent uranium, which is widely accepted as “weapons-grade” purity for use in a weapon that can fit inside a missile warhead. Technically speaking, however, Iran would not necessarily need to make this leap. The atomic bomb dropped on Hiroshima used roughly 80 percent enriched uranium, and even 60 percent enriched uranium could be used to fashion a cruder but still usable nuclear device.³

Iran's 20 Percent Stockpile

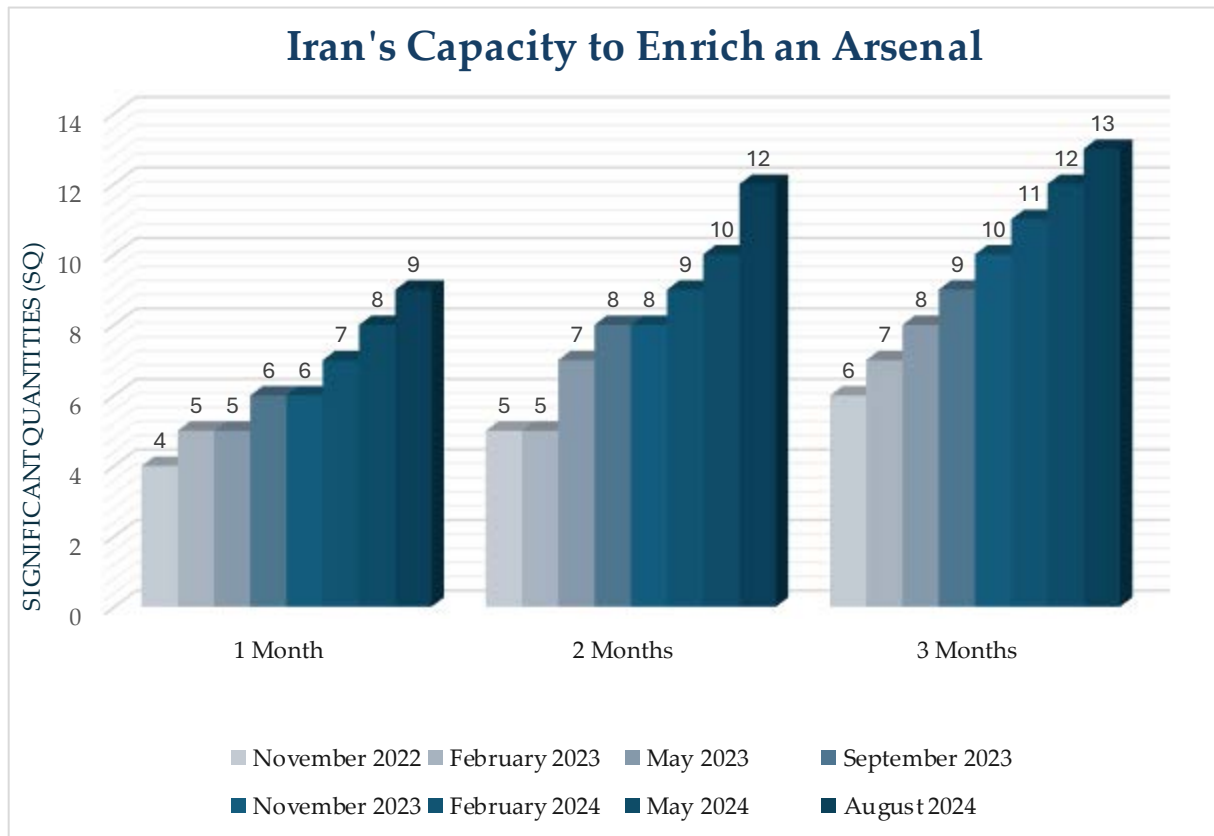


Iran's 60 Percent Stockpile



Iran’s window to produce its first SQ of 90 percent enriched uranium has shrunk steadily in recent years, from roughly 12 months when President Trump left the JCPOA in 2018, and an estimated 3-4 months by the time President Biden took office, to just 1-2 weeks today. The growing scale of Iran’s breakout capacity is at least as worrisome. In November 2020, it needed an additional 2-3 months to

President Biden and Secretary Blinken admitted privately that JCPOA talks were dead.⁵ Today, that capacity is doubled: it can produce eight SQs in only four weeks, and another four in the following two months. Iran has effectively inverted its breakout equation since Biden’s election: where in late 2020 it needed 12 months to produce just three SQs, now it can produce 12 or more SQs in just three months.



Iran has steadily shrunk its breakout time and grown its breakout capacity by fast-tracking each element of its enrichment program since November 2020, and particularly in the past two years. It has been producing 20 percent uranium since November 2020, and 60 percent uranium since April 2021, which represent fully 90 and 95 percent of the work, respectively, to achieve weapons-grade uranium. In parallel, it has quadrupled its enrichment capacity – and by extension, its rate of production – by operating ever more advanced centrifuges. Thanks to their higher efficiency, these new machines have also enabled Iran to shift the center of its enrichment gravity from Natanz to the smaller, more deeply buried and protected facility at Fordo.⁶

B. New Capability and Intent to Build a Bomb

Just as Iran's ability to make fissile material, and lots of it, has raced ahead in recent years, there are growing indications it could be closing in on another final element of the bomb: a workable nuclear explosive device. Since 2018, Israel's daring covert seizure of Iran's nuclear archives has laid bare Tehran's concerted campaign to deceive the world about the full extent of its weaponization efforts, including its failure to come clean to the IAEA as part of the JCPOA's implementation process.⁷ In early 2023, then Chairman of the Joint Chiefs Gen. Mark Milley upended longstanding assumptions that Iran would need 1-2 years to produce a nuclear weapon when he gave the Senate a new estimate of only "several months."⁸ His remarks came in tandem with Israel's sharpening sense of urgency about Iran's work, and its own augmented planning for military action to forestall further Iranian progress, but October 7 and its aftermath put these latter efforts on hold at least temporarily.⁹

In recent months, reports have increasingly surfaced of Iran's advancements on a nuclear device. American and Israeli intelligence revealed this summer that Iran is doing computer modeling, metallurgical research, and simulations of nuclear detonations – activities troubling enough for the Biden administration to prod Tehran for at least a pro forma rejection of its intent to build a bomb.¹⁰ Simultaneously, however, the regime's official line increasingly swings toward affirming its ability and, if provoked, intent to weaponize after years of insisting its nuclear program was purely peaceful and civilian in nature. In this context, it is highly revealing that a July 2024 assessment from the Director of National Intelligence omitted State Department reporting language that routinely appeared in past assessments affirming that Iran was not undertaking key activities to develop a nuclear weapon. Instead, the assessment reportedly concluded that Iran has "undertaken activities that better position it to produce a nuclear device, if it chooses to do so."¹¹

Recent Statements of Iran's Capacity to Weaponize a Nuclear Bomb

Date	Official	Statement
January 13, 2024	Head of Iran's Atomic Energy Organization Mohammad Eslami	"This is not about not having the capability. Rather, it is about us not wanting to do this. In terms of our national security, we do not want to do it. It is not about the lack of capability. This is a very important point."
February 11, 2024	Former head of Iran's Atomic Energy Organization Ali Akbar Salehi	"We possess all the components and technology. We've crossed all the lines, overcome all obstacles. It's like having all the parts to build a car: we have the chassis, the engine, the transmission, everything. Each component serves its purpose, and everything is in our hands."
April 18, 2024	Head of security of Iran's nuclear facilities Brigadier General Ahmad Haghtalab	If Israel threatens "to attack our country's nuclear sites as a tool to put Iran under pressure, revision of the Islamic Republic's nuclear doctrine and policies as well as a departure from the previously announced reservations is conceivable and probable."
April 22, 2024	Majlis National Security Council member Javad Karimi Ghadossi	"If approval is given, it will be a week until the first [nuclear] test."
May 12, 2024	Senior Advisor to Ayatollah Khamenei Kamal Kharrazi	Iran does "not possess nuclear weapons, and there is a fatwa from the leader regarding this matter. But what should you do if the enemy threatens you? You will inevitably have to make changes to your doctrine."

C. Nuclear Black Box

The darkness Iran has cast over its nuclear program certainly feeds America's sleepwalking. The closer it has moved to the nuclear threshold, the more it has obscured that progress by violating its safeguards agreements with impunity. These factors combine to make Iran's eventual achievement of nuclear weapons capability increasingly unpreventable.

Starting just before JCPOA reentry talks commenced in early 2021, Iran has progressively, and aggressively, rolled back access to its enrichment-related sites by IAEA inspectors. Throughout, IAEA Director General Rafael Grossi has waved a red flag about his agency's inability to track the full extent of Iran's expanding nuclear program, including the potential for clandestine enrichment sites.¹² Since 2019, Iran has also blocked inspectors from pursuing new leads drawn from the trove of archive material seized by Israel and pertaining to the past extent and current status of its weaponization work. As strict UNSC prohibitions on Iran's nuclear and conventional proliferation networks have lapsed since 2020, there are also growing concerns that Iran could leverage its tightening strategic ties with Russia, China, and North Korea to surreptitiously attain vital technology or know-how to help it cross the nuclear threshold. This June, Grossi warned publicly that Iranian suggestions of its ability to weaponize were amplifying his own concerns about its clandestine and illegal activities.¹³

Iran's ability to obscure and obfuscate key elements of its progress creates a vicious cycle for the United States, its partners, and the IAEA. Tehran is drawing down the blinds on an already-shrinking window for timely and accurate detection of its final steps toward the bomb. This is complicated further by the historical fact that many countries' ultimate decisions about achieving the requisite elements of a bomb, and whether to fully assemble them into a workable device, involve political as well as technical considerations that may not proceed logically or generate clear intelligence signals. Gen. Milley's comment last year on the amount of time Iran would need to produce a nuclear weapon reflects this enigma, as does more recent evidence of Iran's weaponization experiments, because they call into question prior, dearly held U.S. and Israeli

assumptions that Iran would move sequentially to weaponization only after it successfully enriched 90 percent uranium.

Tellingly, the United States has a far from sterling track record of predicting when countries go nuclear, or even the true extent of their progress toward this point. Washington was caught off guard by the first Soviet, Chinese, and French nuclear tests, and by the timing and number of Indian and Pakistani tests in 1998. The considerable nuclear advances made by Iraq, Libya, South Africa, and Syria, before those programs were halted in one way or another, also came as surprises.¹⁴

III. U.S. Strategy?

Iran's precipitous nuclear advances are occurring in direct proportion to the lack of serious U.S. strategy and focus on the growing problem, yet that is not triggering any overdue course correction by the Biden administration. Even as Tehran approaches the nuclear weapons threshold, the White House appears content to try to avoid anything that risks confrontation with Iran, at least until after the November election. By easing Iran's path to the bomb and conveying U.S. reticence to fulfill well-established threats, sweeping the nuclear issues under the rug actually works at cross-purposes with the administration's other driving concern to manage potential escalation of the Gaza conflict and forestall a full-blown regional war. By the same token, neither aspirant to replace Biden has articulated a clear strategy for addressing the threat, nor have they drawn serious attention to it.

The result is not a tenable status quo, or even a stopgap for the next few months, but rather a dangerous spiral as Tehran's progress further undermines the credibility of increasingly hollow U.S. promises to prevent a nuclear Iran. The next administration will inherit this serious deterrence deficit, with precious little time before October 2025, when it loses a key remaining lever to rebuild international pressure by "snapping back" UNSC sanctions that have lapsed steadily since 2020.

Even before taking office, the Biden team pledged to do everything possible to prevent a nuclear Iran, while focusing its actions almost exclusively on reentering, extending, and strengthening the JCPOA nuclear deal. While avowing constantly that it would pivot to a “Plan B” of sanctions and military preparations if talks failed, the administration sat on its hands as Iran dragged out negotiations, ramped up enrichment, blocked inspectors, and launched proxy attacks on U.S. forces. Despite all this, it took Iran calling their bluff and walking away to finally kill the talks on a new or revived JCPOA in August 2022.¹⁵

Shortly beforehand, the administration’s Special Envoy for Iran, Rob Malley, foreshadowed the U.S. policy void when he told the Senate that “all options are on the table ... but let’s leave it at this: the only solution here is a diplomatic one.”¹⁶ Rather than tangibly adopting the oft-promised Plan B, the president chose the worst possible option. He admitted that Iran killed his Plan A, and his officials continued to threaten punishment for Iran’s nuclear and regional aggression, yet they spent the next two-plus years patently refusing to do anything to fulfill these promises. This includes allowing Iran to reap billions in revenue from unenforced U.S. sanctions on its energy sector, avoiding repeated chances to refer Iran’s IAEA violations to the UNSC, and even publicly easing America’s longstanding redline by declaring Iran will not be permitted a “fielded” nuclear weapon.¹⁷

The administration’s closest approximation of a policy, an unofficial “not-a-deal” that offered Iran significant sanctions relief to slow slightly its accumulation of 60 percent uranium in summer 2023, merely reinforced that Tehran faced zero real penalties – and in fact, tangible incentives – for further aggressive pursuit of its nuclear ambitions.¹⁸ Top Biden officials also “bear-hugged” Israel to constrain and dissuade the latter’s mounting, if also very belated, preparations for military action against Iran’s nuclear program before October 7. Though lost in the headlines, in early 2022 Iran crossed Prime Minister’s Netanyahu’s decade-old redline at one SQ of 20 percent enriched uranium, leading Israeli officials a year later to issue a new, quieter ultimatum against any Iranian enrichment past 60 percent.¹⁹

President Biden’s misguided faith in this ostensible holding pattern is reinforced by accumulating fears of distraction from other priorities at home, Ukraine, Indo-Pacific, and, increasingly, on the ground in the Middle East. Ironically, Iran exploits these fears to continue advancing its nuclear program in the absence of any clear strategy to stop it. In seeking to “manage” regional escalation and categorically avoid further risk, including at times by inserting conspicuous daylight in its strategic relations with Israel, the Biden team is actually encouraging and incentivizing Tehran to increase the levels of risk by embroiling the United States and Israel more deeply in proxy conflict, and thereby create time and diversions to aid its nuclear march.²⁰

With the White House team myopically hoping to avoid the worst and aiming for nothing better, its next occupant will have barely any time to address these compounding crises. The nine months between inauguration and the October 2025 expiration of “snapback” will evanesce quickly amid the competing demands of staffing a new administration, bringing it up to speed on policy issues, and dealing with an already-full agenda of domestic and international challenges. At the same time, the window for preventing a nuclear Iran will close further as the costs and uncertainties of prevention continue growing – especially if Tehran and other adversaries try to seize on any perceived instability or lack of leadership surrounding the presidential transition in Washington.

IV. Implications of Iran’s Nuclear Progress

With less than two months before the election, both presidential candidates must recognize now that Iran’s nuclear progress will confront them with an urgent and consequential challenge from the day they first set foot in the Oval Office, and even during the post-election transition period. At best, the next president will inherit a profoundly complex and difficult crisis where Iran will likely be in position to complete every element of a nuclear weapon more easily and promptly than the United States, its partners, or inspectors can reliably detect – let alone stop – such a move.

Fixing this dangerous situation will require much more focused and consistent attention, resources, resolve, and risk-taking than the current administration has

shown, especially if Tehran prefers to stay ensconced in the current gray zone where it garners key benefits of a nuclear umbrella without overtly acquiring or testing a nuclear weapon. This ambiguity will make it difficult, but also imperative, to consider revised redlines for Iran's nuclear program, since existing U.S. redlines are predicated on Iran taking these final steps toward procuring a nuclear weapon. Upholding redlines will also require hard-nosed thinking about how to overcome America's profound deterrence deficit in Tehran's eyes – and the eyes of U.S. partners – after years of unfulfilled promises amid a larger, evermore glaring void of credible prevention policy.

While risky, uncertain, and demanding, addressing this crisis is still preferable to the alternatives in an already-dangerous world for U.S. interests, leadership, and credibility that are increasingly in doubt globally. Most immediately, Tehran's sharpening sense of enjoying a nuclear deterrent, if currently latent or nascent, will further inflame its appreciable readiness to stoke conflict with the United States, Israel, and other U.S. partners. Even if the timing of Hamas's brutal October 7 assault surprised Tehran, its "ring of fire" nevertheless felt emboldened enough to fire the first shots on six additional fronts, kicking off a regionwide war that imposes considerable costs and risks on U.S. forces and vital interests. On one front alone, against Iran's Houthi proxies in Yemen, the pace of U.S. naval engagements in the Red Sea and Bab el Mandab now exceeds anything since the Second World War. In the process, Iran has demonstrated a growing appetite for direct involvement, even without a nuclear umbrella, launching massive missile and drone barrages against Israel and threatening death and destruction to U.S. targets in ways reminiscent of Cold War brinkmanship.

Sheltering under a nuclear deterrent, or even just a perceived one, Iran's sense of escalation dominance and readiness to court conflict would become even greater, especially since it would have totally eviscerated longstanding U.S. warnings and ultimatums in the process. American leaders would have to confront very painful dilemmas, including withdrawing from the region altogether, and leaving Israel and friendly Arab countries to their fates, or risking a major conflict that poses even greater drains on precious U.S. resources.

The knock-on effects would be global. The value of U.S. commitments likely would be decimated in the eyes of China and Russia, both of whom would test redlines and further deepen their strategic cooperation with Iran, at the expense of U.S. interests and allies in Europe and Indo-Pacific. The most successful arms control agreement in modern history – the Nonproliferation Treaty (NPT) – and the bilateral U.S. civilian nuclear agreements based on it, also would be crippled worldwide if Iran were to gain nuclear weapons capability without serious penalty. Proliferation cascades, and with them untenable nuclear arms races, would then unfold in the Middle East and elsewhere. One country, North Korea, has acquired nuclear weapons in this century. If Iran is the next, it will not be the last. It is hard to exaggerate the powerful impact on global stability, and on U.S. security, because the promises of president after president of the United States to prevent this outcome will have been proved hollow.

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