



# Future of the Iranian Nuclear Program



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### Introduction

There are currently nine confirmed nuclear-armed states: US, Russia, the United Kingdom, France, China, India, Pakistan, North Korea and Israel. Historically, nuclear proliferation began with the US in 1945, followed 4 years later by the Soviet Union (now Russia). The United Kingdom acquired nuclear capability 3 years later, France after 8 years, China after 4, India after 10, Israel after 5, Pakistan after 19, and North Korea, after 8 years, became the last state to declare possession of nuclear weapons in 2006. Overall, the expansion to nine nuclear-armed states took roughly 61 years, averaging about one new nuclear power every 7.6 years. However, since 2006, no additional country has joined this group. This represents a period of nearly twenty years without further proliferation, about three times the historical average interval of nuclear expansion.



South Africa was the only state to acknowledge, after the end of apartheid in 1991, that it had developed six nuclear weapons, reportedly with close cooperation with Israel. The post-apartheid government under Nelson Mandela subsequently dismantled the arsenal, making South Africa the first and only country to voluntarily abandon a fully developed nuclear weapons program. In the post-Soviet context, Ukraine, Kazakhstan and Belarus inherited nuclear weapons on their territory following the dissolution of the Soviet Union, but transferred them to Russia, with the process completed in 1996.<sup>2</sup>

It is also important to note that five North Atlantic Treaty Organization (NATO) members, Germany, Italy, Belgium, Türkiye and the Netherlands, host US nuclear weapons under US operational control. Separately, Belarus hosts Russian nuclear weapons under Russian command.<sup>3</sup>

On the other hand, the growing shift toward nuclear energy as a long-term alternative to oil has become increasingly pronounced. According to an International Atomic Energy Agency report issued in August 2025, titled “International Status and Prospects for Nuclear Power 2025,” 37 countries are developing nuclear power programs, while about 20 others have expressed interest in incorporating nuclear power into their future energy strategies.<sup>4</sup> This trend heightens the risk of “dual-use” dynamics, whereby civilian nuclear programs may gradually acquire military dimensions. Such a risk is particularly relevant in cases where states possess the necessary technical capabilities while also perceiving significant external security threats, as in the case of Iran.



## First: The Iranian Nuclear Program

The literature on Iran’s nuclear program indicates that Henry Kissinger, former US National Security Advisor and Secretary of State, supported in the 1970s a civilian nuclear program originally proposed by the Shah of Iran in 1957 under the “Atoms for Peace” program. The program’s long-term design envisaged the construction of 23 nuclear reactors. US–Iran negotiations between 1974 and 1976 focused on managing proliferation risks, particularly by restricting reprocessing capabilities to ensure exclusively peaceful use and prevent a regional nuclear arms race. Kissinger approved a memorandum valued at \$6.4 billion for the sale of six to eight US-built nuclear reactors to Iran. This initiative formed part of a broader strategic partnership in which the US, under the Nixon Doctrine, viewed Iran as a key pillar of regional stability in the Gulf.<sup>5</sup> However, following the 1979 Iranian revolution, this trajectory was fundamentally altered. Kissinger later reversed his position and became a leading advocate for terminating Iran’s nuclear program, describing it in 2013 as a major threat to regional stability.<sup>6</sup>



**Henry Kissinger**

It is necessary to distinguish between future projections shaped by political and propagandistic considerations and those grounded in systematic analysis of empirical realities, indicators and strategic dynamics. In this regard, the repeated predictions made by Israeli Prime Minister Benjamin Netanyahu concerning Iran’s imminent acquisition of a nuclear weapon represent a notable example of politically driven forecasting rather than evidence-based assessment. His successive predictions appear more reflective of political alarmism and deterrence rhetoric than of rigorous strategic analysis, as shown in the table below:<sup>7</sup>

**Table 1: Netanyahu’s Predictions Regarding Iran’s Acquisition of a Nuclear Weapon**

Prediction No.	Year of Prediction	Predicted Timeframe for Iran Becoming a Nuclear State
1	1992	1995–1997
2	1995	1998–2000
3	2002	2003
4	2009	2010–2011
5	2012	2013
6	2013	2013
7	2015	2016–2018
8	2022	2022
9	2025	2026



The gap between Netanyahu’s earliest and latest predictions extends from 1995 to 2026, a span of more than three decades. This repeated pattern of inaccurate forecasts reinforces the conclusion that these predictions were primarily “political and rhetorical” rather than analytically grounded. As such, they provide little basis for serious future-oriented analysis, particularly given that none of the predictions has materialized to date.

## **Second: Scenarios for the Iranian Nuclear Program**

The Iranian nuclear program has evolved through several distinct phases.<sup>8</sup> Its origins date to the Shah’s era in the mid-1970s. Following the 1979 revolution, Western cooperation, particularly German involvement through Siemens, was suspended in 1979–1980, and the Bushehr reactor project was halted. The Iran–Iraq War (1980–1988) further damaged existing infrastructure and effectively froze much of Iran’s nuclear activity. Covert dimensions of the



Iranian nuclear program, including links to the Pakistani Abdul Qadeer Khan network and entities in Argentina, among others, persisted after Khomeini’s death. However, revelations by the Mojahedin-e-Khalq (MEK) regarding secret nuclear activities pushed Iran to publicly present its program as “peaceful,” particularly after President Bill Clinton accused Tehran in 1995 of pursuing nuclear weapons capability.

A major turning point came in 2002, when the MEK group disclosed underground nuclear facilities at Natanz (uranium enrichment) and Arak (heavy water production). These revelations triggered international scrutiny and led to Western sanctions between 2003 and 2015, as well as multiple sanctions imposed by the UN Security Council, alongside Iran’s engagement in negotiations with the P5+1 (US, UK, France, China, Russia and Germany).

In 2015, the Joint Comprehensive Plan of Action (JCPOA) was concluded, under which Iran agreed to limit enrichment and reduce stockpiles in exchange for sanctions relief. However, in 2018, following the US withdrawal under President Donald Trump and the launch of a “maximum pressure” campaign, Iran gradually resumed higher-level enrichment, reaching levels of up to 60%. Since then, and through 2026, Iran has continued to advance its nuclear program.<sup>9</sup> While enrichment at elevated levels is widely reported, it has not been independently confirmed in full detail. Western assessments generally suggest that Iran has increasingly focused on mastering the full nuclear fuel cycle, a dual-use capability with both civilian and potential military applications, under the supervision of the Atomic Energy Organization of Iran (AEOI).

Based on the above, four scenarios can be outlined for the Iranian nuclear program:

1. Dismantlement Scenario.
2. Nuclear Threshold Scenario: Continuation of the program in its current form.



3. Weaponization Scenario: Iran’s entry into the nuclear-armed states.
4. Black Swan Scenario.

The relative plausibility of these scenarios cannot be assessed in isolation from the broader structural factors shaping the Iranian nuclear trajectory. In other words, the debate, framed between claims of an Iranian drive toward militarization and Iran’s insistence on the “peaceful nature” of its program, cannot be reduced to a purely technical question. Instead, it must account for wider determinants, including evolving regional and global deterrence balances, the future of Iran’s political regime, the scope of US strategic engagement in the Middle East, Israel’s role in shaping responses to the Iranian nuclear file, and the future configuration of the international system.

Each of these dimensions includes distinct sub-indicators and associated spillovers, while also interacting dynamically through reciprocal effects that can be analytically captured using a Cross-Impact Matrix.

Sub-indicators for the four scenarios outlined above can be presented as follows:<sup>10</sup>

### **1. Dismantlement Scenario<sup>11</sup>**

This scenario assumes that Iran would fully abandon its nuclear program, regardless of whether its orientation is civilian or military, broadly comparable to the experiences of Libya, South Africa and several post-Soviet states. While these cases differ in their specific political and technical pathways, they converge on a common outcome: the complete termination of the program or the removal of its most strategically sensitive components.

The key current and prospective indicators associated with this scenario include the following:

- a. Iran reduces its currently declared uranium enrichment levels (20–60%) and recommits to the 3.67% ceiling established under the 2015 P51+ nuclear agreement with the US. This level is sufficient for civilian nuclear energy production and remains far below the threshold required for nuclear weapons, which generally exceeds 90% enrichment.
- b. Iran permits expanded monitoring by the International Atomic Energy Agency (IAEA), including broad inspector access to nuclear facilities, infrastructure, and enriched uranium stockpiles.
- c. A shift in Iranian policy from merely “suspending” all enrichment-related activities to dismantling key elements of the program, particularly those associated with potential military dimensions, while the US continues to condition sanctions relief on dismantlement rather than suspension.



d. A broader transformation in Iran’s grand strategy, reflected in:

- The rising influence of moderate factions within the political establishment at the expense of hardliners.
- A reduced role for the Islamic Revolutionary Guard Corps (IRGC) in shaping strategic decision-making.
- A geostrategic reorientation from the Middle East toward deeper engagement with Central Asia and the Caucasus.
- Declining tensions between Iran and the US, particularly on matters of shared strategic interest.
- Continued reliance on the religious ruling (*fatwa*) prohibiting nuclear weapons production, providing the regime with an ideological justification for dismantlement.

### **Variables Constraining the Scenario<sup>12</sup>**

The indicators outlined above are unlikely to emerge within a fully supportive environment for this scenario. A number of countervailing factors could significantly reduce the likelihood of the required transformations, including the following:

- a. Retreating from major strategic projects can weaken both the domestic legitimacy and international standing of the state. Internally, such reversals may embolden opposition forces and intensify pressures on the regime; externally, they may encourage adversaries to interpret the retreat as the beginning of a broader strategic decline.
- b. Historical precedents suggest that abandoning nuclear programs has not necessarily yielded significant political, economic or security gains. The Libyan case under Muammar Gaddafi, and to some extent the Iraqi case under Saddam Hussein, produced largely negative outcomes, whereas North Korea’s persistence ultimately secured a credible deterrent capability.
- c. Scientific elites and political forces aligned with the nuclear program are unlikely to accept the dismantlement of facilities developed at enormous financial cost. Moreover, the perceived value of nuclear deterrence remains a powerful incentive for preserving the program as a guarantor of regime security.

### **2. Nuclear Threshold Scenario:**

Iran’s current nuclear program is widely viewed as a form of nuclear latency, effectively placing the country at the nuclear threshold. This refers to a state that “refrains” from producing a nuclear weapon while nevertheless “possessing” the infrastructure, technological capabilities, scientific expertise, and fissile materials necessary to develop one within a relatively short period of time. A considerable body of scholarship maintains that Iran currently remains at this threshold stage.



The principal indicators associated with this scenario include the following:<sup>13</sup>

- a. Continued uranium enrichment at levels reaching 60%, coupled with the accumulation of stockpiles reportedly held at locations “not fully verified.”
- b. Iran’s ability to progressively advance its nuclear capabilities shortens the pathway to potential weaponization without formally crossing into actual military production.
- c. Tehran’s assessment that the likelihood of full US support for maximal Israeli objectives, particularly a large-scale invasion akin to the Iraq model, has declined, thereby easing external pressure on Iran.
- d. The belief within Iran that preserving the program in its current form enhances its bargaining leverage and improves its ability to secure political, economic and even military concessions.
- e. Reliance on a strategy of deliberate nuclear ambiguity through limiting the IAEA’s ability to conduct fully unrestricted inspections of all aspects of the program.
- f. Iran’s effort to consolidate an international perception that, while the program is unlikely to be abandoned, it remains containable.
- g. A growing US preference for containing the program rather than engaging in a costly and prolonged military confrontation with Iran.
- h. The perception within Iran that President Donald Trump had ultimately concluded that his pressure campaign failed to achieve its strategic objectives, and that Tehran could outlast the remaining two and a half years of his presidency.

#### **Variables Constraining the Scenario<sup>14</sup>**

- a. There are growing indications that Russian and Chinese support for Iran’s nuclear program has not reached the level Tehran had expected. This is particularly reflected in President Vladimir Putin’s stated willingness for Russia to receive Iran’s enriched uranium through its transfer out of Iranian territory. Putin reiterated this position during US–Iran negotiations following the ceasefire in May 2026.



- b. The cumulative burden of economic sanctions, the costs of military escalation, and increasing domestic political instability in Iran all constitute significant structural pressures that could incentivize greater Iranian flexibility toward US demands.

### **3. Weaponization Scenario**

This scenario is based on several key indicators, most notably:<sup>15</sup>

- a. Iran achieving uranium enrichment levels of up to 90%, commonly regarded as weapons-grade.
- b. Tightening restrictions on, or a full suspension of, IAEA inspections in Iran.



- c. The emergence of domestic discussions regarding withdrawal from the Nuclear Non-Proliferation Treaty (NPT).
- d. The persistence of covert dimensions within Iran’s nuclear activities.
- e. An accelerated production of advanced centrifuges, coupled with their dispersal across geographically remote and covert sites.
- f. The emergence of internal debate over revising or reinterpreting the religious ruling (*fatwa*) on nuclear weapons, particularly by distinguishing between possession and use, thereby narrowing the fatwa to prohibiting “use” rather than “acquisition.”
- g. Sustained US, Israeli and other external pressures, which heighten regime perceptions of vulnerability and potential instability, thereby increasing incentives for strategic deterrence.
- h. A growing perception among segments of the Iranian elite that the North Korean model demonstrates the strategic utility of nuclear weapons as a guarantee of regime and national security.

#### **Variables Constraining the Scenario**

Constraints on this scenario include:

- a. The risk of a large-scale military strike, particularly by the US, other Western powers or Israel.
- b. The potential for regional proliferation, as overt weaponization could encourage states such as Türkiye, Egypt or Saudi Arabia to pursue nuclear capabilities, thereby further destabilizing the regional order.
- c. US and Israeli strikes on nuclear facilities, along with the targeting of senior Iranian nuclear scientists, which have already degraded the program across multiple dimensions.

#### **4. Black Swan Scenario**

This scenario refers to a “low-probability, high-impact event.” It includes a range of disruptive developments, both constraining and enabling, such as:<sup>16</sup>

- a. Large-scale domestic instability leading to a breakdown of the Iranian political regime.
- b. A significant hardening of the strategic orientation of the Supreme Leader and the political-military elite.
- c. The emergence of new leadership that opts to fully terminate the nuclear program.
- d. A major military strike against Iran with far-reaching strategic consequences.
- e. The discovery of covert programs inside or outside Iran indicating the existence of nuclear weapons, including stockpiles held abroad or in undisclosed locations within Iranian territory that have not yet been detected.
- f. A major positive breakthrough in US–Iran relations.
- g. A structural decline in US regional influence, coupled with the rise of alternative great powers filling the resulting vacuum.



### Third: Balancing the Scenarios

It is useful to begin by briefly considering an analytical model developed by a US research institute known as the “Iran Threat Geiger Counter.”<sup>17</sup> The model integrates two dimensions: “Iran’s hostile actions and intentions toward the United States and U.S. allies, and its capability to turn these hostile intentions into action through the potential or actual construction of nuclear weapons.” It thus rests on two core variables: state hostility and technical capability. These are operationalized across six equally weighted indicators, each assigned 30 points, for a maximum aggregate score of 180. On this basis, threat levels are classified as Least Danger, Low Danger, Moderate Danger, Considerable Danger, High Danger and Extreme Danger.



The Iran Threat Geiger Counter’s measurement framework is based on the following indicators and sub-indicators:

1. Hostile Actions: Support for armed groups, issuance of threats, and regional destabilization.
2. Hostile Rhetoric: Official statements, justification of nuclear deterrence, and repeated references to Israel’s disappearance.
3. Lack of Transparency with IAEA: Restrictions on inspectors, undeclared nuclear sites, and centrifuge production outside monitoring.
4. Nuclear Breakout: The short time required to produce a sufficient quantity of highly enriched uranium.
5. Sensitive Nuclear Capabilities: Centrifuge technology, high-level enrichment capacity, technical expertise, and advanced nuclear infrastructure.
6. Beyond Breakout: Nuclear weapons research, warhead design, implosion mechanisms, missile-compatible miniaturization, and testing activities.

Report Findings: The report assigns the following scores (out of 30) across the six core indicators:

- Hostile Actions: 20 points.
- Hostile Rhetoric: 29 points.
- Lack of Transparency: 24 points.
- Nuclear Breakout: 30 points.
- Sensitive Nuclear Capabilities: 27 points.
- Beyond Breakout: Building Nuclear Weapons: 27 points.
- The total threat score is 157 out of 180, i.e., 87.2%.



However, the model originates from an institute with close ties to nuclear non-proliferation organizations, which may predispose it to overstating the Iranian threat. Moreover, intelligence assessments remain contested in terms of reliability, particularly when they assign equal weight to intent-based indicators and technical capabilities, an approach that can exaggerate the significance of “verbal” signals, especially during crises.

By contrast, the technical dimension is comparatively more robust, as it draws on IAEA data, including enrichment levels, uranium stockpiles, centrifuge capacity and inspection activity.

Overall, the “Iran Threat Geiger Counter” framework integrates technical evidence, strategic analysis, and political assessment. It is best understood as a useful heuristic, but one that should not be overinterpreted as a precise predictive tool.

From a complementary perspective, it is necessary to assess the interaction and mutual influence among scenario indicators, as some reinforce or weaken others. Moreover, the relative weight of each indicator varies in shaping the trajectory of the phenomenon under study. These interdependencies suggest the following outcomes for the period up to 2030, with and without accounting for “black swan” events:

1. The least likely scenario is the dismantlement of the nuclear program and a full strategic reversal, with a probability of 5–10%.
2. The scenario of declaring nuclear weapons capability and withdrawing from NPT stands at 35–40%.
3. The most likely scenario is the continuation of the current program with incremental tactical enhancements, at 60–65%.

However, these probability estimates remain subject to “black swan” events, which could substantially shift the balance in favor of one scenario over another if they occur. At the same time, the prospect of such disruptions may further reinforce Iran’s inclination toward strategic ambiguity, shaping adversaries’ behavior on the assumption that Iran may possess nuclear weapons, without allowing either confirmation or definitive denial.

This suggests that the dismantlement scenario can be largely discounted. The more plausible outcome is a conditional form of equilibrium: maintaining a “nuclear threshold status” while periodically signaling the potential for weaponization. In this context, external pressure, particularly from the US and Israel, functions as the main driver of incremental escalation. This would begin with declaratory moves such as announcing “that the country could enrich uranium up to 90% purity, a level considered weapons-grade, if Iran is attacked again,” a threshold referenced by Ebrahim Rezaei, spokesperson of the Iranian parliamentary National Security and Foreign Policy Committee.<sup>18</sup> Such signaling would further entrench a conditional shift from a threshold posture toward a latent weapons capability, with probabilities rising to about 80%.

At the same time, increasing security threats are likely to strengthen the IRGC position, hardline political factions, and elements within the AEIOI,<sup>19</sup> thereby reinforcing internal momentum toward a potential nuclear weapons scenario.



## Endnotes

- <sup>1</sup> An expert in futures studies, a former professor in the Department of Political Science at Yarmouk University in Jordan and a holder of Ph.D. in Political Science from Cairo University. He is also a former member of the Board of Trustees of Al-Zaytoonah University of Jordan, Irbid National University, the National Center for Human Rights, the Board of Grievances and the Supreme Council of Media. He has authored 37 books, most of which are focused on future studies in both theoretical and practical terms, and published 120 research papers in peer-reviewed academic journals.
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- <sup>4</sup> Emerging Nuclear Energy Countries, site of World Nuclear Association, 12/5/2026, <https://world-nuclear.org/information-library/country-profiles/others/emerging-nuclear-energy-countries>
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- <sup>8</sup> Matt Field, A simple timeline of Iran’s nuclear program, Bulletin of the Atomic Scientists, 19/6/2025.
- <sup>9</sup> The Status of Iran’s Nuclear Program, Arms Control Association, February 2025, <https://www.armscontrol.org/factsheets/status-irans-nuclear-program-1>



<sup>10</sup> Three scenarios were developed:

1. Dismantlement Scenario, with 7 sub-indicators.
2. Nuclear Threshold Scenario, with 10 indicators.
3. Weaponization Scenario, with 11 indicators.

A Cross-Impact Matrix comprising 28 indicators was used to estimate probabilities and identify the most likely scenario based on statistically derived interdependencies among variables. The resulting probabilities remain subject to variation due to potential “black swan” effects arising from interactions among the underlying sub-indicators. For methodological details, see Avinash Nafday, Strategies for Managing the Consequences of Black Swan Events, site of American Society of Civil Engineers (ASCE), 15/9/2009, <https://ascelibrary.org/doi/10.1061/%28ASCE%29LM.1943-5630.0000036>

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