

TEHRAN IS EXPOSED: A UNIQUE OPPORTUNITY TO CONFRONT THE IRANIAN NUCLEAR THREAT

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The Islamic Republic of Iran has never been so vulnerable. Israel must take advantage of this window of opportunity to defuse the nuclear threat from Tehran.

The October 7 massacre set off a multifront war that enabled Israel to break the “ring of fire” that Iran’s clerical regime spent decades putting in place around the Jewish state. Hezbollah to the north posed the greatest threat with its arsenal of nearly 200,000 rockets and missiles. Israeli forces smashed Hezbollah. Under Bashar al-Assad, Syria hosted Iran-backed militias from across the region. The Assad regime collapsed. Palestinian terrorists in Gaza led by Hamas landed a traumatizing blow on October 7, but Israel has battered them to the point where they are barely effective. Yemen’s Houthi rebels struck cargo ships in the Red Sea but inflicted minimal damage on Israel. The United States is now hammering the Houthis in a military operation designed to cut the terror group down to size. Twice, Tehran itself targeted Israel with barrages of missiles and drones numbering in the hundreds. The effort failed. When Israel retaliated, Iran’s air defenses proved impotent. Indeed, now the country’s strategic air defense has been heavily degraded.

Tehran’s ring of fire was supposed to deter Israel from striking decisive blows against the regime and its nuclear program. And that strategy was effective; for years, many in Israel were indeed hesitant to preempt the threat. Hoping other solutions were available, Israel hesitated to strike even though the destruction of the country remains the clerical regime’s ultimate goal. But now the calculus has changed. Israel’s fear of preemption is gone. It is time for Israel to rapidly increase the pressure on Tehran, so it must either shut down every pathway to nuclear weapons or endure withering pressure — including the threat of devastating strikes on the regime’s leadership and nuclear assets — that may also bring down the Islamic Republic.

To compensate for its vulnerability, Tehran has recently accelerated its pursuit of nuclear weapons. The U.S. intelligence community has concluded that “a secret team of the country’s scientists is exploring a faster, if cruder, approach to developing an atomic weapon if Tehran’s leadership decides to race for a bomb.”¹ This is not an isolated development — the regime’s nuclear program has marched forward consistently over the past four years. As of February 2025, Tehran has approximately 275 kilograms of uranium enriched to 60 percent purity, an increase of 92.5 kilograms from November 2024.² It would need only “a week or a little more” to enrich enough 90 percent

1. David Sanger and Julian Barnes, “Iran Is Developing Plans for Faster, Cruder Weapon, U.S. Concludes,” *The New York Times*, February 3, 2025. (<https://www.nytimes.com/2025/02/03/us/politics/iran-nuclear-weapon.html>)

2. Stephanie Liechtenstein, “Iran accelerates production of near weapons-grade uranium, IAEA says, as tensions with US ratchet up,” *Associated Press*, February 26, 2025. (<https://apnews.com/article/iran-nuclear-iaea-weapons-grade-uranium-trump-0b11a99a7364f9a43e1c83b220114d45>)

pure uranium for a proper device, then CIA Director William Burns said in October 2024.³ Iran also continues to develop ballistic missiles capable of delivering a warhead to Israel or even Europe. Some of these missiles have recently been transferred to Iraq for use by Iran-backed militias.

Tehran has accelerated its nuclear program with little fear of consequences because the United States spent four years pursuing a policy of so-called “de-escalation.” In practice, this meant that Tehran escalated while Washington remained passive. The regime even sought to assassinate Donald Trump as he campaigned for a second term in the White House. Once in office, Trump put back in place his policy of “maximum pressure” on Tehran. New economic sanctions are having an impact, while those already on the books are likely to be enforced much more vigorously. Waves of U.S. airstrikes against the Houthis have signaled Washington will respond to force with force.

Nevertheless, Trump has made clear that what he wants is a deal, not a war. Talks have already begun in Oman. Yet though Trump has declared that he is not seeking a temporary agreement that merely pauses Iran’s pursuit of the bomb, like the 2015 deal that President Barack Obama approved, in reality, it seems this might not be the case. The demand for “full dismantlement” of Iran’s program that Trump’s national security adviser articulated was the correct approach.⁴ Unfortunately, based on recent reporting, it seems that Special Envoy Steve Witkoff’s negotiating approach is quite different.⁵ If the reporting is true, one should expect a much weaker stance by the U.S. administration that leads to yet another temporary agreement that does not resolve the problem but just further delays it. If past is precedent, Tehran will use any given opportunity to squeeze concessions from the United States, as it did with Obama and his secretary of state, John Kerry, in an attempt to drag out negotiations beyond the “snapback” deadline for reimposing UN sanctions and eventually trade as little nuclear rollback as possible for the most achievable sanctions’ relief.

Should that occur, and if Tehran does not shut down its nuclear weapons program, it is just a matter of time before decisive military action will be necessary. For Israel, a nuclear-armed Iran ruled by a Shiite extremist poses an existential threat. Israel is prepared to protect itself with force if that becomes necessary to remove that threat. By all accounts, Israel’s strong preference is to see the success of America’s coercive diplomacy, whose potential becomes clear if we look more closely at the turmoil inside Iran.

THE SUPREME LEADER’S UNPLEASANT OPTIONS

Supreme Leader Ali Khamenei spent the past four years avoiding high-risk decisions. He did not initiate a dash for a nuclear bomb. But he also did not consummate nuclear negotiations with the Biden administration for a return to the 2015 nuclear deal, formally known as the Joint Comprehensive Plan of Action (JCPOA). His suppression of domestic protests against the regime remained brutal but claimed fewer lives than in previous years. Khamenei was able to thread this needle because the U.S. policy of “de-escalation” never forced him to confront the weakness of his own position. Khamenei oversaw the acceleration of his regime’s nuclear program while continuing to fund, train, and equip Hamas and other proxies in the ring of fire. President Joe Biden’s policy of de-escalation failed either to resolve the nuclear problem or to diminish Iran’s regional aggression.

The Trump administration quickly set a new course for U.S. policy. On February 4, the White House issued National Security Presidential Memorandum 2 (NSPM-2), which reinstated the policy of “maximum pressure” that Trump

3. Olivia Victoria Gazis, “CIA director warns ‘misjudgments’ could further escalate conflict in Middle East,” *CBS News*, October 8, 2024. (<https://www.cbsnews.com/news/cia-director-william-burns-warns-misjudgments-could-escalate-conflict-israel-hamas-lebanon>)

4. Emily Mae Czachor, “Trump administration is seeking ‘full dismantlement’ of Iran’s nuclear program, Waltz says,” *CBS News*, March 23, 2025. (<https://www.cbsnews.com/news/mike-waltz-national-security-adviser-iran-nuclear-program-face-the-nation>)

5. Josh Dawsey, Michael Gordon, and Laurence Norman, “Witkoff Says U.S. Open to Compromise Ahead of Iran Nuclear Talks,” *The Wall Street Journal*, April 11, 2025. (<https://www.wsj.com/world/middle-east/steve-witkoff-interview-iran-nuclear-talks-e41e0114>)

pursued from mid-2018 until the end of his first term. That policy yielded a spike in inflation and three years of negative GDP growth for Iran.⁶ Plunging oil revenues forced Tehran to impose an austerity agenda, including sharp cuts to gasoline subsidies. Mass protests erupted in late 2019, which the regime was able to suppress only by gunning down hundreds of demonstrators — as many as 1,500, according to a Reuters investigation.⁷

Khamenei did not panic. Instead, he chose to run out the clock on maximum pressure, with Trump facing reelection less than a year later. The gamble worked. De-escalation replaced maximum pressure. The recession ended. And exports of crude oil rose substantially, replenishing hard currency reserves. But this did not mean that all was calm in the Islamic Republic. New demonstrations erupted when a young woman, Mahsa Amini, died in police custody after being detained for an alleged violation of the country's Islamic dress code. Hundreds died during the crackdown on protests, and a wave of regime poisonings targeted girls' schools across the country.

Within days of Trump reinstating his maximum pressure policy, the Iranian rial plunged to a new low, trading at over 900,000 to the dollar, compared with less than 700,000 when Americans went to the polls in November 2024.⁸ By mid-March, a dollar bought more than 1 million rials — more than a 20-fold increase since Trump first took office in 2017.⁹ The regime also continues to deal with the fallout of an energy crisis that began in December 2024, with blackouts increasingly common across the nation. President Masoud Pezeshkian has offered little consolation. "We must apologize to the people that we are in a situation where they have to bear the brunt," he said.¹⁰

Wave after wave of protests has engulfed Iran over the past decade. It would be a gamble for Khamenei to remain passive as maximum pressure sets in, hoping his security forces can handle the fallout as domestic unrest continues to challenge the regime. Hopefully, as Khamenei weighs his options, he realizes that the cost of his nuclear ambitions has become prohibitive. Yet he may prefer to take a major risk to compensate for the current weakness of the regime and dash to build a nuclear device. Reportedly, his ultra-conservative supporters favor this option. They believe this would force the West to become far more cautious and perhaps chill their support for anti-regime protests. An atomic weapon would also serve as a powerful deterrent against military strikes on Iran. The regime may believe it can dash for the bomb in secret. However, if the effort is exposed, it could provoke large-scale military action against Iran, threatening the regime's survival.

The time is approaching when Khamenei — or possibly a successor — must choose one of the options the regime has spent years trying to avoid.

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6. Saeed Ghasseminejad, "Inflation in Iran Reaches 23-year Peak," *Foundation for Defense of Democracies*, August 13, 2019. (<https://www.fdd.org/analysis/2019/08/13/inflation-in-iran-reaches-23-year-peak>); Saeed Ghasseminejad and Richard Goldberg, "The Impact of Sanctions Two Years After U.S. Withdrawal From the Nuclear Deal," *Foundation for Defense of Democracies*, May 6, 2020. (<https://www.fdd.org/analysis/2020/05/06/sanctions-impact-two-years-after-jcpoa-withdrawal>)

7. "Special Report: Iran's leader ordered crackdown on unrest – 'Do whatever it takes to end it,'" *Reuters*, December 23, 2019. (<https://www.reuters.com/article/world/special-report-irans-leader-ordered-crackdown-on-unrest-do-whatever-it-take-idUSKBN1YR0QO>)

8. "Iran currency plunges to record lows amid escalating U.S. tensions," *Reuters*, February 8, 2025. (<https://www.reuters.com/markets/currencies/iran-currency-plunges-record-lows-amid-escalating-us-tensions-2025-02-08>)

9. "Iran's currency falls to one million per dollar after Trump threat," *Iran International*, March 18, 2025. (<https://www.iranintl.com/en/202503183157>); Saeed Ghasseminejad, "Cratering Economy Drives Iranian Rial to All-Time Low," *Foundation for Defense of Democracies*, June 24, 2020. (<https://www.fdd.org/analysis/2020/06/24/iranian-rial-driven-to-all-time-low>)

10. Farnaz Fassihi and Leily Nikounazar, "Iran's Energy Crisis Hits 'Dire' Point as Industries Are Forced to Shut Down," *The New York Times*, December 21, 2024. (<https://www.nytimes.com/2024/12/21/world/middleeast/iran-economy-energy-crisis.html>)

THE CHOICES FACING ISRAEL AND THE WEST

Despite the bruising setbacks of the past year, Iran and its proxies will slowly recover if they do not face sustained pressure. For the United States, Israel, and the pragmatic regimes of the Arab world, Iran's weakened state offers great opportunity, but passivity would let it slip away and yield great danger. Since 1979, the Islamic Republic of Iran has systematically sought to destabilize Arab governments that oppose the spread of its brand of Islamic extremism. Lethal antisemitism is an intrinsic part of that doctrine, crafted by Ayatollah Ruhollah Khomeini, the first supreme leader. For Khomeini and his successors, the destruction of Israel and the Jewish people is a central objective, not a rhetorical flourish. It surprised no one in Israel that the regime lavished praise on Hamas for the October 7 massacre.

The United States and Europe have ample cause for concern even if Israel and the Arab states have the most to fear from a nuclear-armed Iran. If Tehran were to have atomic weapons, it would trigger a nuclear arms race, with Arab states insisting they must have their own deterrent. Already weak, the global nonproliferation regime could collapse. So, it is not only Tehran that is facing difficult choices.

The Trump administration has initially chosen the path of maximum pressure, at least in principle. Meanwhile, many veterans of the Biden and Obama administrations and many leaders in Europe would still prefer to avoid confrontation and revive a deal resembling the JCPOA. It may be that Trump's actual policy is to follow that less demanding path, seeking only a temporary deal. For precisely that reason, an imperative third option for Israel is to resort to military force now when Iran is weakest.

Avoiding confrontation is certainly the path of least resistance. Tehran has welcomed negotiations if Washington relaxes pressure to reward it for coming to the table. Apparently, the Trump administration is willing to play along for now. It is far too early to know if and how these negotiations will end, but even if a return to the JCPOA were possible, the deal's last restrictions would expire in 2030, allowing the regime to expand its nuclear program from that point forward without fear of consequences. A temporary but updated deal could delay those expirations, but that would simply give the regime time to recover its strength before the next showdown.

So far, the White House has opted instead for maximum pressure coupled with diplomacy. This policy will be most effective if European governments form a coalition with the United States as they did prior to the JCPOA. There is little chance that Russia or China would cooperate as each did during the early years of Obama's presidency. Yet Russia is consumed by its war against Ukraine, and China is edging toward a tariff war with the United States, while its economy remains heavily dependent on exports.

More important than multilateralism is clarity about what kind of deal the West is seeking to extract from Tehran. Unlike the JCPOA, a new agreement should ideally totally and permanently eliminate Iran's ability to enrich uranium or reprocess plutonium. There is no economic need for these activities. They are simply a means of producing fissile materials for nuclear weapons. There must also ideally be full exposure of Iran's past nuclear weaponization efforts, leading to a ban on any such activity. Limits on Iran's arsenal of ballistic and cruise missiles will also be necessary since they are the preferred means of delivering nuclear weapons. Strict monitoring, verification, and enforcement provisions, unlike those in the JCPOA, will be essential to give teeth to the agreement.¹¹

11. For a detailed analysis of the provisions necessary to ensure Iranian disarmament, see: Orde Kittrie, Andrea Stricker, and Behnam Ben Taleblu, "Iran's Nuclear Disarmament: The Only Deal That Protects U.S. and Allied Security," *Foundation for Defense of Democracies*, March 14, 2025. (<https://www.fdd.org/analysis/2025/03/14/irans-nuclear-disarmament>)

An agreement that meets this high standard would be far preferable to military action and the risks of war. Yet to ensure Tehran accepts such an agreement, it must face an overwhelming and credible military threat. Such a threat has indeed been mounting, with two U.S. carrier strike groups now stationed in Iran's vicinity and with B-2 bombers now parked on Diego Garcia. Iran is now negotiating under the shadow of this unveiled American threat.

Broadly speaking, military action against Iran could take two forms: a preventive strike or a punitive strike. Preventive strikes would be launched if Iran proves uncooperative in negotiations but before it dashes for a bomb. The logic of a preventive strike is that waiting until Iran has initiated its nuclear breakout creates the risk of missing the opportunity to attack at all — either because Iran will catch the West by surprise or because the conditions that would have enabled a successful strike no longer exist.

There is no single facility whose destruction would disable the Iranian nuclear program. Several key targets are deep underground and hard to strike. Therefore, a preventive strike should target a variety of sites and assets — from facilities and infrastructure to materials and personnel — that Iran needs to obtain a nuclear weapon. Cumulatively, these strikes should leave Iran incapable of a nuclear weapons breakout and in need of massive investment to recover. The attack should be carried out only when the probability of success is high to prevent Iran from exploiting the strike as a pretext for a nuclear breakout.

A punitive attack could be launched after Iran decides to dash toward a bomb. Its goal would be both to prevent Iran from succeeding in building a nuclear weapon and, not less importantly, to weaken the regime politically and economically by striking a wide range of non-nuclear assets. The strikes should leave the regime with neither a bomb nor the ability to function. It should put other rulers on notice that the cost of nuclear proliferation far exceeds the benefits.

Whether preventive or punitive, the threat of military action must be credible, feasible, and ready to execute on short notice. Even by itself, Israel has sufficient capabilities to damage Iran's nuclear program unilaterally. Before the crippling of Hezbollah and Hamas, Iran might have hoped to deter Israel by threatening to initiate a multifront war in response to any attack. Tehran's arsenal of missiles and drones has also lost much of its deterrent effect thanks to its poor performance over the past year. Nevertheless, a joint strike on Iran by multiple Western nations would still be preferable to unilateral Israeli action. Other countries, especially the United States, have unique capabilities that could maximize the impact of an attack. That said, Israel's allies may choose to abstain from entering a war but share capabilities that increase the effectiveness of a unilateral Israeli strike.

ISRAEL'S NEXT STEPS

On both the diplomatic and military fronts, Israel must prepare for an effective pressure campaign against Iran. Diplomatically, it must clearly convey to the United States and other allies the terms it considers acceptable for a nuclear deal that puts an end to the Iranian threats. Israel must also remind the United States of the presidential commitment embodied in the July 2022 The Jerusalem U.S.-Israel Strategic Partnership Joint Declaration, also known as the Jerusalem Declaration, which stipulates that Israel has the right to defend itself by itself, should Israel deem it necessary:

Consistent with the longstanding security relationship between the United States and Israel and the unshakeable U.S. commitment to Israel's security, and especially to the maintenance of its qualitative military edge, **the United States reiterates its steadfast commitment to preserve and strengthen Israel's capability to deter its enemies and to defend itself by itself against any threat or combination of threats.** The United States further

reiterates that these commitments are bipartisan and sacrosanct, and that they are not only moral commitments, but also strategic commitments that are vitally important to the national security of the United States itself.

The United States stresses that integral to this pledge is the commitment never to allow Iran to acquire a nuclear weapon, and that it is prepared to use all elements of its national power to ensure that outcome. The United States further affirms the commitment to work together with other partners to confront Iran's aggression and destabilizing activities, whether advanced directly or through proxies and terrorist organizations such as Hezbollah, Hamas, and Palestinian Islamic Jihad.¹²

Militarily, Israel will need to update its contingency plans and coordinate with allies to deal with the fallout of military action, should it prove necessary. Bolstering air defenses and preparing retaliatory plans are paramount. The U.S. military and the Israel Defense Forces are already tightening coordination and cooperation for joint action in the event of a nuclear breakout.

Above all, Israel must make it clear that it will act independently to stop Iran from going nuclear and that it will not refrain from attacking Iranian infrastructure, energy facilities, and government targets if push comes to shove.

There is no time to waste. Iran's unprecedented vulnerability presents a historic opportunity that should not be passed over. Iran should never have a nuclear bomb.

12. The Jerusalem U.S.-Israel Strategic Partnership Joint Declaration, Jerusalem, Israel, July 14, 2022. (<https://il.usembassy.gov/the-jerusalem-u-s-israel-strategic-partnership-joint-declaration>)

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