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When Strategic Interests Collide: The Twelve-Day War, Iran's Nuclear Future, and the Crisis of Non- Proliferation Diplomacy

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When Strategic Interests Collide: The Twelve-Day War, Iran's Nuclear Future, and the Crisis of Non-Proliferation Diplomacy¹

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ABSTRACT: This paper examines the failure of nuclear non-proliferation diplomacy in the case of Iran, focusing on the June 2025 Twelve-Day War as a critical juncture. It analyzes the strategic interests of the actors involved, and especially Iran's, to shed light on the dynamics that led to military intervention. The paper combines strategic and political analysis with insights from expert sources to evaluate both the material and political consequences of the strikes on Iran's nuclear facilities. Findings indicate that Iran's threshold strategy – maintaining nuclear capability just below weaponization – as a deterrence tool collapsed under the joint US-Israeli operation, even though the attacks only delayed rather than destroyed its nuclear program. The analysis further highlights that negotiations remain the most sustainable path to non-proliferation, but are now highly constrained. Finally, the paper assesses how the Iran case may reshape international non-proliferation diplomacy, illustrating the broader implications of coercive interventions on transparency, compliance, and the credibility of the global nuclear regime.

KEYWORDS: Iran, non-proliferation, diplomacy, Israel, United States.

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CLASHING STRATEGIC INTERESTS IN THE IRANIAN NUCLEAR DILEMMA

Understanding the failure of non-proliferation diplomacy in Iran requires first mapping the strategic calculus of the main stakeholders. Each actor approaches the Iranian nuclear question from a distinct security vantage point. At the center of the crisis is Iran itself, whose pursuit of nuclear capabilities has reshaped its regional and global positioning, and led to its deepest strategic weakening since the Islamic regime's power grab in 1979 – a dramatic turnover that could perhaps indicate that the regime has overplayed its hand. Around Iran orbit its nemesis, Israel, as well as the United States and the Gulf Arab states, whose fears and ambitions interact in ways that have made the search for a diplomatic solution very fragile.

For **Tehran**, the nuclear program has always been more than a technical project – it is a strategic hedge rooted in Iran's security dilemma and regime survival instincts. The country is geographically encircled by US military assets, from Qatar's Al Udeid Air Base to the Fifth Fleet located in Bahrain and the US military presence in Iraq. Add to this the steady deployment of US aircraft carriers in the Persian Gulf and the military infrastructure of NATO member countries located in the country's proximity like Turkey, and the perception of encirclement is somehow palpable in Tehran. From the Iranian leadership's perspective, the only way to neutralize this imbalance has been to cultivate the ultimate deterrent that would raise the costs of foreign intervention.

Iran's fear of intervention is not at all abstract considering that its twentieth-century history is marked by multiple instances of interference: the 1953 Anglo-American coup that paved the way for the Pahlavi Dynasty to rule the Persians for nearly three decades; the Western support for Iraq during the 1980–88 Iran-Iraq War; or the frequent covert operations attributed to Israel and the United States. **This legacy has made Iranian elites hypersensitive to regime vulnerability.** The presence of Israel as a *de-facto* nuclear weapons state in the Middle East compounds the problem. Whereas under the Shah maintained close security and economic ties with Israel, the post-1979 regime recast it as its principal enemy. For Tehran, Israel's nuclear monopoly in the region – reinforced by the string of Israeli wins against Iran's proxy network since the beginning of the conflict in October 2023 – is a reminder of Iran's strategic inferiority and a justification for at least keeping the nuclear option open.

The origins of Iran’s nuclear program reveal how tightly it is bound to regime identity. After the revolution, the Islamic regime shuttered the civilian nuclear program started by Pahlavi Shah, denouncing it as a Western-dependent model. Yet as Suzanne Maloney (2025) points out, Saddam Hussein’s 1980 invasion of Iran completely changed the calculus. **Facing an existential threat, Tehran began to view advanced technologies, including nuclear know-how, as strategic insurance.** Since then, the nuclear project has been virtually woven into the identity of the paranoid regime as a besieged but resilient power (Malloney, 2025).

Since that moment, Iran has become what Vipin Narang describes as the “consequential hard hedger”, in that **it continued to maintain the technical capability to weaponize but consistently stopping short of doing so** (Narang, 2025). This so-called “threshold strategy” that was carefully planned in the AMAD Project³ allowed Iran to keep its options open. The 2015 Joint Comprehensive Plan of Action (JCPOA) perfectly epitomized this logic: Iran accepted temporary restrictions on enrichment in exchange for sanctions relief, securing economic breathing room while retaining the industrial base and scientific expertise necessary to restart enrichment at a later time. This nuclear threshold strategy served three functions: first, it provided a rapid breakout⁴ option if existentially threatened. Second, it sowed some kind of deterrent ambiguity, by keeping its arch-enemies US and Israel uncertain about how close to achieving the nuclear bomb Iran truly was. And third, it offered leverage in negotiations, where nuclear concessions could be exchanged for much-needed sanctions relief (Narang and Vaddi, 2025). Until June 2025, Iran was convinced that this threshold strategy largely worked in its favor, and even proceeded to gear up its enrichment levels before the negotiations with the Trump Administration that were expected this year – as we can deduce from IAEA’s reports which showed a larger-than-usual increase between February and May 2025 (Berry, 2025).

If Tehran saw nuclear hedging as survival, **Tel Aviv** justifiably saw it as an existential threat. Tehran’s rhetorical commitment to the destruction of the so-called “Zionist regime” and its long support for proxy forces like Hezbollah, Hamas, and the Houthis ensured that Israel would deem any nuclear progress intolerable. Israeli strategists often pose the stark question of

³ The *AMAD Project* was Iran’s covert nuclear weapons program, aimed at designing and testing the components necessary for a functional nuclear explosive device, including warhead design and missile delivery capabilities. It was uncovered in the 1990s and formally halted in 2003, likely in response to increased international scrutiny and the US invasion of Iraq for allegedly possessing weapons of mass destruction.

⁴ In nuclear policy terminology, *breakout point* refers to the point at which a state possesses sufficient fissile material, technology, and capability to produce a deliverable nuclear weapon if it chooses to do so.

what would happen if one of the hundreds of Iranian missiles launched towards Israel carried a nuclear warhead.

This fear underlies the Israeli national consensus that Iran must be denied nuclear weapons at all costs. It is a policy very much in line with Israel's long-standing military doctrine based on anticipatory self-defense, otherwise known as the Begin Doctrine (Bastardo Martinez, 2025). As shown by then-Prime Minister Begin's decision to strike down Iraq's Osirak reactor in 1981 or Prime Minister Olmert's bombing of Syria's Al-Kibar facility in 2007, this doctrine has pushed Israeli governments to act decisively and eliminate any potential nuclear threats before they reach a reasonable level of maturity. It is likely that the Iranian nuclear program has long been on Israel's watchlist, and in 2025 Israel perceived Iran to be geopolitically weakened and vulnerable to attack. After all, since the October 2022 Gaza war, Israel had significantly degraded every component of the Axis of Resistance⁵, while the collapse of the Assad regime in Syria in December 2024 deprived Tehran of a key strategic ally. As the "deterrence equation that dissuaded Israel from striking Iran broke down" (Geranmayeh, 2025), **Israel calculated that it was finally feasible to make the inevitable strike on Iran's nuclear sites**, even if that meant fighting on two open fronts for an undetermined period of time – a strategy often characterized as deficitary by classic and modern military doctrines.

For **Washington**, the Iranian nuclear issue has always sat at the intersection of maintaining its alliance commitments with Israel and US-friendly Gulf States, and maintaining the global non-proliferation regime. **Protecting Israel, often described as "America's closest ally", has been a bipartisan imperative since the country's inception.** However, the fact that the Netanyahu government successfully persuaded Donald Trump – who ran all his presidential campaigns on staunchly anti-interventionist messages and the promise not to get entangled anymore in "endless wars" in the Middle East (Kinnard, 2025) – to join the June 2025 strikes reflects both the depth of American-Israeli ties and the credibility costs at stake. Moreover, it is also **very likely that the United States feared a regional nuclear domino effect**: if Iran went nuclear, Saudi Arabia, Turkey, and Egypt might follow. That outcome would not only destabilize the already shaky region, but it would shred the global non-

⁵ The so-called Axis of Resistance refers to the network of Iranian-backed paramilitary groups that operate across the Middle East: Hamas (Gaza), Hezbollah (Lebanon), the Popular Mobilization Forces (Iraq), the Houthis (Yemen).

proliferation regime entirely and potentially produce a worldwide proliferation domino effect. Equally important for the Americans were economic considerations: a nuclear Iran could threaten freedom of navigation through the Strait of Hormuz, disrupting global energy markets and enhancing Tehran's leverage over regional oil-exporting rivals – even though this scenario is oftentimes characterized as rather unlikely by experts due to the fact that such a measure would disproportionately impact Iran's own exports and China's trade⁶ (Derentz, 2025). However, Marco Rubio's **appeal to China** to intervene and deter Iran from attempting a disruption in the Hormuz (Hancock, 2025) is telling of Washington's concerns regarding this move, as well as to the fact that a nuclear Iran would be harder to deal with in future issues regarding the Hormuz Strait.

For **the Gulf States**, Iran's nuclear project and the Twelve-Day War present a strategic dilemma. On one hand, Arab solidarity and the traditional hostility towards the Jewish state constrained their ability to openly welcome the June strikes. On the other, their overriding **concern was the prospect of Iranian regional dominance under a nuclear umbrella**. Saudi Crown Prince Mohammed bin Salman already confirmed that his country will pursue its own nuclear program if Iran succeeded in doing so (FoxNews, 2023).

Moreover, the credibility of US security guarantees looms large: if Washington failed to contain Iran, capitals such as **Riyadh** and **Abu Dhabi** might reconsider their dependence on the American security umbrella – just as Washington might as well reassess its willingness to defend the Gulf monarchies, and perhaps even Israel, against a nuclear Iran. At the same time, the fear of post-intervention retaliation fuels Arab states' feelings. **Qatar** was the first (and so far the only) collateral target of both the telegraphed Iranian strikes on US bases during the June conflict, as well as of the subsequent attack by Israel, in which they tried to kill Hamas negotiators in September 2025. Their ambivalence reflects thus a core tension: they quietly welcomed the weakening of Iran's nuclear program, but worried that the blowback would destabilize their own regimes (Bradley, 2025; Times of Israel, 2025).

⁶ Experts at the [Atlantic Council](#) assess that “over 80 percent of the crude oil, condensate, and LNG transported through the Strait of Hormuz is consumed in Asian markets” and that China “would be disproportionately exposed to any Iranian move in the strait.”



WHY NON-PROLIFERATION DIPLOMACY FAILED IN THE CASE OF IRAN: THE LIMITS OF TRUST AND COMMITMENT

This analysis argues that the June 2025 US-Israeli strikes on Iran – and especially the decisive component of dragging the world’s greatest power to the joint operation – marked not only the collapse of Iran’s threshold strategy as the cornerstone of its foreign policy but also a deeper rupture in the international non-proliferation regime. The resort to force indicates that decades of painstaking diplomacy attempts failed to prevent the crisis from culminating in military action.

The international non-proliferation regime institutionalized by the *Treaty on the Non-Proliferation of Nuclear Weapons* (NPT) was less a perfect balance than a fragile pact: a two-tier system that provided reassurance for non-nuclear states that they could pursue peaceful nuclear energy programs without triggering suspicion, and guarantees for nuclear-weapon states that proliferation would remain constrained to the select club of “sprinters”.⁷ **The regime’s effectiveness rested on trust: that nuclear powers would not abuse their arsenals, and that non-nuclear states would not exploit civilian programs to develop weapons.** Iran’s case demonstrates the limits of this system. Its enrichment program, far larger than required for civilian needs, consistently fueled suspicion. By the late 1990s, Tehran had acquired uranium enrichment capabilities and was stockpiling fissile materials well beyond what was necessary for medicine or energy (3-5%), undermining the very reassurance the NPT sought to provide.

In the following decades, a certain approach became embedded in Western strategic thinking: impose **severe economic sanctions to constrain Iran’s capabilities**, erode its economic resilience, and use the prospect of sanctions relief as leverage to secure nuclear concessions and enhanced international monitoring. Then in 2015, the *Joint Comprehensive Plan of Action* (JCPOA) became the high-water mark of Iran’s diplomatic engagement. The ‘Iran Nuclear Deal’ imposed strict limits on uranium enrichment, capped stockpiles, and subjected Iran to (more) thorough IAEA inspections. In return, Tehran received sanctions relief that temporarily revitalized its economy. At that time, the JCPOA was proof that Iran’s

⁷ The term *nuclear sprinter* was coined by Vipin Narang, referring to the states that had the capacity to develop nuclear weapons independently and chose to do so: United States, Russia, China, France, United Kingdom, as well as India.

threshold strategy works to a certain degree: Tehran could trade away chunks of its program without giving up the option to restore it later. Between 2016 and 2019 Iran complied with the guardrails, IAEA inspectors had access, and the nuclear program was verifiably contained (Dunbacher, 2025). However, the JCPOA's fragility was always apparent. Key restrictions were set to expire after a decade (the 'sunset clauses'), and the deal did not address Iran's ballistic missile program or its regional proxy activities. That is one of the reasons why Israel and Gulf states criticized the agreement as buying short-term relief while leaving the option that Tehran could resume enrichment later.

Then in 2018, **Trump's decision to withdraw the United States from the deal** – a decision which brought about the *de-facto* collapse of JCPOA – reflected that domestic political polarization has reached the foreign policy arena which had once been relatively bipartisan. For those following the American policy debate, the withdrawal came as no surprise. Since negotiations began in the first half of the decade, Republicans clashed with Barack Obama and constantly attempted to block the final deal in Congress – whose implementation was saved only by the Democrats' filibuster in the Senate. Add to that Israel's efforts in persuading Washington through lobbyists and the direct intervention of Netanyahu himself (Sherman, 2018). The bitter political debacle around this foreign policy issue reinforced perceptions in Tehran and around the world that US commitments on non-proliferation are contingent on the political orientation of the administration in power.

After 2018, Iran gradually ceased cooperating with IAEA inspectors, curtailed monitoring, and began enriching uranium at purity levels approaching weapons-grade – erasing the JCPOA's achievements in just a few years and violating both the defunct JCPOA, and the provisions of the NPT (Narang and Vaddi, 2025). By the early 2020s, efforts to revive the agreement faltered even after Democrats were back in the White House. Iranian negotiators demanded ironclad guarantees against another potential US withdrawal, something no administration could credibly provide given America's hyper-polarized politics. Meanwhile, the economic benefits of re-entry diminished as global sanctions networks and "maximum pressure" policies had already deeply reshaped Iran's economy.

The failure of US-Iran non-proliferation diplomacy was not predetermined, but three interlocking dynamics ultimately undermined it. First, **deep structural mistrust** persisted: Iran's enrichment far beyond civilian needs eroded international confidence, while decades of sanctions and intervention convinced Tehran that Western powers sought regime change rather



than compromise. Second, **rising political polarization in Washington** turned the JCPOA into a partisan issue, weakening America's ability to sustain consistent commitments across administrations. Finally, **strong regional opposition** – particularly from **Israel** and **Gulf states** skeptical of Iran's intentions – shaped American policy and deprived the agreement of crucial regional support, leaving it politically fragile and strategically unsustainable.

IRAN'S NUCLEAR FUTURE AFTER THE TWELVE-DAY WAR

Israel's Operation Rising Lion and especially United States' Operation Midnight Hammer were a decisive break from decades of reliance on diplomacy and verification. **Despite Iran's technical proximity to the bomb, there was little evidence in mid-2025 that Tehran had decided to weaponize it.** By most assessments, it is true that Iran had achieved the threshold status – being able to produce weapons-grade uranium within days once the political decision had been taken – but remained under partial IAEA monitoring, which would have been able to detect any diversion toward military use (Arms Control Association, 2025). Even American intelligence concurred that Ayatollah Khamenei had not ordered weaponization and that Iran was “not building a nuclear weapon” (Office of the Director of National Intelligence, 2025). **This meant the threat was urgent but not imminent.** Both President Trump and President Pezeshkian continued to signal openness to diplomacy, with talks reportedly “progressing” as late as May 2025 (Davenport, 2025).

Against this backdrop, the June airstrikes appeared **preemptive** rather than responsive, marking a political rather than intelligence-driven escalation that undermined the residual trust sustaining the non-proliferation process. Thus, the operation achieved a measurable but limited technical effect and a far larger political one: it substituted kinetic delay for durable control, removed the last vestiges of faith in the deal-based route, and reshaped incentives across the region. The critical questions are therefore what the strikes actually accomplished, why Tehran is unlikely to abandon the nuclear option, and which of the two pathways (negotiation in weakness or covert pursuit) is now most likely for Iran.

Operational Assessment: Nuclear Program Disrupted, not “Obliterated”

After four months, public and expert assessments converge on a narrow but important consensus: **the June 2025 US-Israeli bombing campaign severely degraded Iran’s nuclear enrichment infrastructure but did not eradicate its nuclear potential.** Before the strikes, Iran was estimated to have accumulated over 400 kilograms of uranium enriched to 60 percent, far above the 3-5% level typically used for civilian nuclear energy (Dumbacher, 2025). As it is likely that part of them have been moved from the main enrichment facilities in anticipation of strikes, their whereabouts are unknown for now. But as Michael Froman (2025) emphasizes, this stockpile is “of little use for any Iranian nuclear weapons program in the near term if their enrichment capabilities were wiped out.” Thus, we can deduce that the focus of *Midnight Hammer* was not to destroy fissile material, but to cripple the industrial base that could weaponize it – Iran’s large-scale IR-6 centrifuge cascades located across three facilities that were targeted: **Natanz, Fordow, and Esfahan** (Froman, 2025).

Comprehensive assessments of the strikes’ impact will take some time, but the consensus across intelligence and independent sources indicate that the Iranian nuclear program has been just delayed. **The US Defense Intelligence Agency assessed that the strikes set back Iran’s capabilities by several months** (Bertrand, Lillis, & Cohen, 2025), not years, while Reuters (2025) reported similar estimates, with earliest restart timelines in two months. The Arms Control Association (2025) noted that “it is impossible to destroy Iran’s nuclear program, given the irreversibility of the knowledge Iran has gained about the fuel cycle and from its pre-2003 nuclear weapons efforts.” In other words, airpower can interrupt enrichment, but not erase institutional knowledge, technical expertise, or latent capacity. Israel was well aware of that and made key Iranian specialists involved in the illicit nuclear weapons program a prime target, assassinating at least 11 scientists and 30 security chiefs during the Twelve-Day War (Goller and Landay, 2025) – a move likely meant to discourage others from engaging in the country’s nuclear pursuit as well, but unlikely to completely erase Iran’s decades-long investment in nuclear know-how.

The International Atomic Energy Agency (IAEA, 2025) confirmed key operational disruptions after the strikes, reporting that the centrifuges at Iran’s Fordow facility – one of the most fortified underground sites – were “no longer operational.” Yet the same report warned that underground damage assessments remained incomplete, leaving uncertainty as to whether

deeply buried cascades or spare parts might still be usable. **This ambiguity between “inoperable” and “intact but dormant” capacities is precisely why most analysts describe the outcome as a delay, not destruction.** With IAEA’s activity suspended in Iran since July 2, it will be difficult for Western and Israeli intelligence agencies alone to assess this with a high degree of accuracy.

We can also draw an **important distinction between Washington’s and Tel Aviv’s strategic messaging.** While President Trump and Secretary Rubio immediately rushed to claim a “complete and total obliteration” of Iran’s nuclear program (The White House, 2025), Israeli Prime Minister Netanyahu avoided such categorical characterizations – a reflection of US political expediency versus Israel’s continued operational concern that Iran retains reconstitution potential. The contrast underscores that, for Israel, deterrence remains incomplete until Iran’s threshold capability is irreversibly dismantled – a condition yet unmet.

Beyond the enrichment facilities, **the strikes also inflicted broader systemic damage.** Iran’s command and control structure suffered major disruption, its ballistic missile inventory was significantly depleted, and the air defense network was largely neutralized, granting Israel temporary airspace supremacy (Froman, 2025). Moreover, Israel’s extensive intelligence penetration within Iran’s elite institutions – facilitated by Mossad’s long-term infiltration – has fostered a climate of mistrust within Tehran’s leadership, slowing decision-making and complicating any coordinated nuclear recovery (Froman, 2025). This adds to the dire political context Iran finds itself in after the fall of Assad in Syria and after its regional proxy network has been significantly weakened by Israeli operations.

In aggregate, the strikes achieved three things. **First**, they curtailed Iran’s large-scale enrichment capacity and eliminated immediate breakout potential. **Second**, they inflicted collateral damage on Iran’s command and proxy systems, reducing its near-term ability to project power. **Third**, they bought time – likely measured in months rather than years – for diplomacy or deterrence to recalibrate. Yet the operation failed to erase the underlying problem: Iran retains the technical expertise, residual material, and institutional commitment necessary to rebuild. Midnight Hammer might have delayed Iran’s nuclear program, but no air campaign can destroy the know-how embedded in people and institutions.



WHY IRAN'S NUCLEAR AMBITIONS ARE HERE TO STAY AND WHAT ARE THE OPTIONS AHEAD

Two dynamics make Iranian renunciation of the nuclear option improbable. **First, the strikes validated Tehran's core security narrative:** that external actors will use force to prevent Iran from achieving what they see as a credible deterrent (and after the June bombing, perhaps as the only deterrent left) unless they can develop an irreversible capability. Thus, this paper joins the side of the argument that the attack increased the perceived necessity of a deterrent rather than reduced it. **Second, the strikes could have destroyed what political capital the regime might have used to credibly placate domestic hardliners by pointing to diplomatic wins.** This logic may be hypothetical, but historically the hardliners of a regime and their arguments are strengthened by kinetic disruption, moderates who had hoped diplomacy would yield protection are delegitimized. This situation might yield a raise in the domestic political price for concessions to adversaries and make negotiations harder.

Iran essentially faces two options ahead: (A) negotiate from a weak position and accept constraints far tougher than those enshrined in the JCPOA; or (B) attempt to go clandestine – to become a 'hider' by Narang's characterization and rebuild covertly, aiming to return to breakout capability outside international view.

Scenario A: Returning to Negotiations

This is the preferred outcome and the stated aim of the Trump Administration: a new negotiated settlement, strict verifications, regional safeguards, and very likely Iran's commitment that they are not going to pursue the nuclear weapon anymore. Despite public proposals from Washington, Tehran has shown no readiness to resume substantive negotiations. Iranian leaders have rejected President Trump's "zero enrichment" (Ravid, 2025) demand and conditioned any talks on guarantees that the United States is unwilling to provide, such as a commitment that Trump will not strike Iran during negotiations. Yet, according to insider reports, Supreme Leader Ali Khamenei and senior clerical figures have privately concluded that re-engagement with the United States may be essential for regime survival (Einhorn, 2025). This suggests that, while public defiance remains a key component of Iran's

negotiating strategy, a pragmatic faction within the leadership recognizes that eventual talks may be unavoidable, and thus they might happen sooner than later.

The prospect of early negotiations does not guarantee in any way an early outcome or a durable result. Sanctions relief in exchange for verifiable limits and strict guardrails may remain the only politically stable, non-violent route, but it has been part of Iran's failed threshold strategy that has brought it to this situation. It is obvious that given its position, Iran must now accept concessions it was not ready to make ten years ago. Robert Einhorn (2025) suggests a compromise of continuing to allow Iran to enrich uranium solely for near-term civilian energy needs instead of Trump's "zero enrichment" clause (which could be anyway part of his well-known maximalist bargaining approach, setting an extreme position only to achieve attainable results), granting the IAEA full autonomy to verify both current and retroactively concealed nuclear activities, and transferring the quantities of higher-enriched uranium and surplus centrifuges that are unnecessary for a civilian program to other nuclear states, just like they did after the JCPOA when quantities of enriched uranium were transferred to Russia.

However, the June strikes destroyed the political preconditions that made even JCPOA possible: mutual, if fragile, confidence that a deal would be upheld on the medium and long term. Any new agreement would face the same structural problems that doomed JCPOA, and especially the inability of one US administration to bind successors in a hyper-polarized political environment. After the strikes, what incentive does Tehran have to trust Washington's commitment again? The United States also has justifiable reasons to distrust the Islamic regime in Iran – the IAEA censure and the pre-strike clandestine activity that motivated it gravely reduce Tehran's bargaining credibility. The net effect is that negotiations are harder and less likely to produce a durable bargain.

Additionally, this time any renewed negotiation would have to start from an exceptionally low baseline. A first essential step would be the reversal of the decree signed by Iran's president in the aftermath of the Twelve-Day War, which barred the International Atomic Energy Agency (IAEA) from monitoring activities (Salem, 2025). **Restoring IAEA's full access – both to verify Iran's remaining stockpiles of enriched uranium and to monitor centrifuge production facilities that have been off-limits for IAEA since 2021** (Einhorn, 2025) – is absolutely indispensable to rebuilding minimal confidence and transparency.

Scenario B: Pursuing Nuclear Capabilities Covertly

This alternative scenario involves Iran pursuing reconstruction clandestinely in the absence or failure of negotiations: dispersed facilities, hidden supply lines, and accelerated enrichment with maximal secrecy. As emphasized earlier, many analysts warn that the strikes may have encouraged more discretion (to both Iran and generally among other hedgers) rather than abandonment. North Korea's model of proliferation – sprint and hide, often with patron-state assistance – is the cautionary example. For Iran, clandestine pursuit carries some distinctive constraints: the regime's industrial, scientific base still exists and could be reconstituted over time, but Mossad and allied intelligence penetration demonstrated before and during the campaign increases the risk of early detection, and that Iran no longer enjoys the same regional buffer and overt great-power diplomatic cover it once expected. These constraints make the **covert path very risky but not impossible.**

Iran's decision between negotiation and hiding will ultimately be guided by the regime's overriding concern for its own survival. Negotiation may promise sanctions relief and economic breathing space but requires political concessions and exposes Tehran to the risk of renewed reversals if future adversaries repudiate deals like President Trump did in 2018. **Sanctions relief** is likely to be more limited than in previous agreements, and as discussed earlier, Iran currently lacks the leverage to negotiate from a stronger position than it has done in 2015 or any time before. That being mentioned, **Tehran may instead choose to skip negotiations and instead work on existing sanctions-evasion networks developed in recent years alongside Russia, China, and other states under Western restrictions.** It is also worth noting that although the UN Security Council voted in September 2025 to reinstate the pre-JCPOA sanctions framework on Iran, most of the pressure had already been in place since the US reimposed its unilateral sanctions in 2018. The newly restored measures primarily concern remaining EU and UK restrictions, which will have a comparatively limited impact. Darya Dolzikova (2025) highlights that Russia and China have rejected the legitimacy of this 'snapback' and are unlikely to comply, effectively signaling to other states – many of which have previously facilitated Iranian trade – that they too can ignore the renewed sanctions without consequences.

Even if the covert pursuit of non-peaceful nuclear capabilities promises a path to a deterrent, it raises the specter of discovery and catastrophic follow-on strikes or even attempts at regime change. Given the regime's recent experience of military defeat, it will logically prioritize options that maximize survival probability.

Abandoning negotiations with the Islamic regime and allowing Iran to pursue the bomb covertly presents a deeply unstable scenario. Even though supporters of this approach in Israel and the United States argue that their advanced intelligence capabilities and near-complete airspace dominance would enable early detection and rapid preemption of any renewed Iranian nuclear activity, intelligence alone cannot ensure confidence in non-proliferation; without a renewed agreement granting the IAEA enhanced on-site verification powers, covert advances would remain possible (Einhorn, 2025).

Moreover, **this scenario required the United States and Israel to rely solely on force** and “mowing the grass” operations whenever the nuclear program is rebuilt and too threatening. This risks perpetual escalation and even more instability in the region, with a high likelihood of Iranian retaliation against Israel, US bases in proximity, or Gulf monarchies. The Institute for the Study of War (2025) already reports that “the [Iranian] regime believes that it has enough domestic support to engage in a prolonged conflict with Israel and could inflict more damage through continued missile strikes in the future”, reflecting at least a stated willingness to fight for what the Islamic regime sees as the ultimate deterrent. And worse than anything for the Trump Administration, **this scenario involves dragging the United States into another protracted Middle East conflict**, as Israel could be in the position to sustain attrition, but not deal with the nuclear issue without the support of the United States.

As per Dolzikova and Savill (2025), for Iran, pursuing a covert nuclear weapons program is far riskier, and far more complex than often assumed. Acquiring a single nuclear warhead, or even a handful, would not necessarily provide credible deterrence against adversaries such as Israel, which possesses around 90 nuclear warheads and the capacity to expand that arsenal to 200, let alone the United States. Any limited Iranian stockpile would be highly vulnerable to preemptive strikes from Israel or the United States with a catastrophic result on Iran's territory. To achieve even a minimal credible deterrent, Iran would need a dispersed arsenal, but any effort to build such a force takes time and would almost certainly be detected by Israeli or US intelligence and acted upon. Moreover, an effective nuclear deterrent depends not only on achieving nuclear capability but also on robust conventional defenses and



a clear command-and-control nuclear doctrine – which Iran lacks. **Following the Twelve-Day War, Iran’s air and missile defenses were severely degraded, leaving it incapable of protecting key assets or credibly signaling retaliatory capacity.** Without rebuilding those conventional foundations or defining a nuclear doctrine, any Iranian bomb would remain more of a liability than a shield (Dolzikova and Savill, 2025).

WHAT THE TWELVE-DAY WAR TEACHES US ABOUT DETERRENCE AND DIPLOMACY

The instrumental lesson is blunt: **force can delay capabilities but cannot permanently substitute for durable political bargains**, and with an Iran that is unlikely to abandon its long-sought nuclear program, it is ultimately either diplomacy or regime change in Iran that can tackle Israel’s justified concern that Iran could reach the breakout point. It is unsustainable for the United States and Israel to strike Iran’s new nuclear facilities every time they are rebuilt – meaning once every few months or years, as that would escalate into another war of attrition.

Another perspective is that while Iran giving up the bomb would be the most ideal and peaceful end to this issue, **the nuclear program is woven into the clerical regime’s identity and stands as the most important pillar of Iran’s national security strategy.** The other pillar is Iran's 'long arm' strategy projected with the help of its **Axis of Resistance** network. As the latter is now as eroded and ineffective as ever, it is highly unlikely that Iran would completely give up on the former.

This paper also argued that decisions moving forward will ultimately be shaped by the regime’s imperative of survival. Yet, predicting an ideal path for that survival remains elusive: **resuming negotiations and accepting concessions** could erode deterrence against external adversaries and embolden internal hardliners, while **pursuing a covert nuclear weapon** would expose the regime to the risk of pre-emptive overthrow by the United States or Israel if they deem it necessary. The path ahead, therefore, will not be ideal and will not guarantee but only maximize the regime’s chances of surviving.

If we look at the big picture, the systemic lesson is grimmer: this episode weakens the normative glue of the international non-proliferation framework. We have Iran, a member of the NPT that has repeatedly crossed red lines and advanced its nuclear program to near-

threshold levels – far beyond what is permitted to non-nuclear states under the NPT and its Additional Protocol. Yet despite these violations, Iran demonstrated a willingness to engage in multilateral negotiations, all of which ultimately failed. Thus, some may argue that if even partial compliance and transparency invite military strikes and regime-toppling threats, other states may reassess the value of transparency. **The result could be a new wave of quiet nuclear hedging by technically capable states** – and perhaps a future in which the world wakes up to surprise announcements of clandestine nuclear arsenals, much like South Africa’s revelation in the early 1990s. But unlike South Africa, the next states to reach that point may not choose to renounce the bomb.

Iran sought to indefinitely straddle both ends of the nuclear bargain: remaining a nominally compliant member of the NPT and a periodic participant in diplomatic frameworks such as the JCPOA – mainly to secure sanctions relief and to avoid the label of a ‘rogue state’ – while simultaneously preserving and threatening to advance the technical capacity required to reach the nuclear threshold. This duplicitary posture allowed Tehran to reap the economic and political benefits of engagement without fully abandoning the strategic objective of latent weaponization. In essence, **Iran tried to sustain a perpetual equilibrium between restraint and readiness – appearing cooperative enough to avoid unified international retaliation, yet retaining enough ambiguity to maintain deterrent leverage.** This nuclear threshold strategy was an ambitious, high-risk, high-reward grand policy — one that ultimately proved unsustainable. Its collapse left the Islamic Republic as vulnerable as ever, stripped of its deterrent ambiguity yet still burdened by the economic and political costs of its failed nuclear gamble.

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