

Isolated and Aggressive: the Conventional and Nuclear Threat Posed by Iran

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Introduction

With the regime in Iran facing both a globally scrutinised domestic rebellion and fierce American and European anger at its support for the Russian invasion of Ukraine, it is increasingly under diplomatic isolation. Simultaneously, Tehran is accelerating the pace of its march towards a nuclear weapon and continuing its aggressive non-nuclear regional operations.

Meanwhile, four and a half years on from then-President Donald Trump's withdrawal of the US from the Joint Comprehensive Plan of Action (JCPOA), and despite the Biden Administration's willingness to pursue a renewed diplomatic solution, efforts at a new deal curtailing the Iranian nuclear programme have hit a dead end.

This paper assesses Iran's latest activity – its regional aggression, nuclear programme, and responses from the international community.

UK to outlaw IRGC

Reports indicate that the UK Government is set to proscribe the Iranian Revolutionary Guard Corps (IRGC) as a terrorist group. The move, which will be greeted warmly in Israel and in other Middle East states, is supported by Security Minister Tom Tugendhat and Home Secretary Suella Braverman and will see the UK follow the policy of fellow 'Five Eyes' members the USA and Canada. Prime Minister Rishi Sunak had first argued for outlawing the IRGC in August 2022, when a candidate for the Prime Ministership, following the attack on Salman Rushdie in New Jersey.

Revelations of multiple planned IRGC attacks in the UK and revulsion over its role in brutally suppressing domestic dissent, have increased British appetite for the policy. The head of MI5 Ken McCallum publicly revealed in November that foiling Iranian assassination attempts had

formed much of the security services' work in the past year. "Iran projects a threat to the UK directly, through its aggressive intelligence services", said McCallum: "At its sharpest this includes ambitions to kidnap or even kill British or UK-based individuals perceived as enemies of the regime. We have seen at least ten such potential threats since January alone." Israeli media reported that Mossad had, in this case and several others, played a key role in alerting MI5 to the threats.

The IRGC designation may also signal a harder UK line more broadly on Iran. Sunak has previously questioned the viability of the Joint Comprehensive Plan of Action (JCPOA) and any alternative nuclear deal and indicated a willingness to impose 'snap-back' (pre-JCPOA-level) sanctions on the Islamic Republic. Despite Trump's removal of the US from the JCPOA in 2019, the continued involvement of the other signatories (China, Russia, Germany, France, and the UK) means that the original deal technically remains in place. A British withdrawal, allied to repeated Iranian violations of its terms and the collapse of talks between Iran and the US, could hasten the formal end of the JCPOA. Reports also indicate that French President Macron is of a similar mind to Downing Street, while the European Council's statement of December 12, while formally reaffirming its support for the JCPOA, also noted that Iranian intransigence was a significant barrier to its continuation.

Iranian support for Russian aggression in Ukraine

Iranian activity of most current concern to US and European officials involves the supply of weapons to Russia for use in its war with Ukraine. Such weapons sales, including Mohajer-6 and Shahed-series unmanned aerial vehicles (UAVs), are in violation of a UN Security Council resolution adopted after the

introduction of the JCPOA, and US officials have assessed that the volume of supply and assistance between Moscow and Tehran now amounts to “a full-fledged defence partnership.” UK Foreign Secretary James Cleverly, meanwhile, accused Tehran of “striking sordid deals [with Russia] in a desperate attempt to survive.”

Ukraine considers Iranian drones a serious threat. In a speech to the US Congress on December 21, Ukrainian President Zelensky told American lawmakers that Iranian drones were “a threat to our critical infrastructure. That is how one terrorist has found the other.” Tehran hit back at Zelensky’s accusations, denying supplying Russia and warning that “Mr. Zelensky had better learn lessons from the fate of certain leaders of countries that relied upon support from the US.”

It is estimated that over 400 Iranian-supplied drones have been used by Russia against Ukraine since August. While Iran claims that any supplies were provided prior to the start of the Russian invasion in February 2022, experts argue that analysis of the components found in downed drones refutes this. Diplomatic sources at the UN, meanwhile, have warned that Iranian supplies continue and are set to increase. Short and medium range missiles are likely to be included, as is assistance with the construction of drone factories in Russia itself.

Although capable of limited accuracy and holding a limited payload, the Shahed ‘Kamikaze’ drone has shown itself able to inflict significant damage, seen particularly in attacks on Kyiv and Zaporizhzhia. MiG-29s from the 204th Tactical Aviation Brigade of the Ukrainian Air Force were forced to begin direct aerial engagement with Shaheds in October, and officials have expressed fears that their being forced to shoot down the Shaheds discloses to the Russians the location of their air defence positions.

In an effort to halt drone proliferation, in mid-December the EU imposed sanctions designed to stop the European export of drone components to Iran.

The European Council also imposed sanctions, including asset freezes and travel bans on 25 Iranian individuals and 5 entities. Meanwhile, the Biden Administration was, in the last week of December, said to be mulling similar sanctions and other mechanisms to end Iranian and Russian access to Western-made components, while also providing Kyiv with an enhanced ability to shoot down drones.

Iranian aggression and terror sponsorship

In parallel to the development of its nuclear capacity and its arming of Russia, Iran has continued aggressive land, air, maritime, and cyber policy in the region, and continues to deploy and equip proxy militias. The IRGC and several Iranian proxies – with the most powerful being Hezbollah – continue to expand their presence in the Golan Heights. Local Syrians are said to have been recruited as watchers and activists on the border with the Israeli-controlled Golan, while Hezbollah has taken advantage of local unrest in South-West Syria’s Al-Suwayda, which has close religious and social ties with the Golan, to establish a stronghold in the Tel al-Qalib area. Proliferation continues into Syria of Iranian anti-aircraft and anti-naval weapons, missiles, drones, and precision-guided missile components.

Consistent with its standard practice of arming proxies (as in Yemen, Lebanon, and Syria) Tehran is also increasing its financial support to Palestinian groups such as the Nablus-based Lion’s Den and Palestinian Islamic Jihad. Their growing influence is threatening the control of the Palestinian Authority and its president Mahmoud Abbas, while reports from Gaza suggest that Iranian funding is coming at the expense of reduced support to Tehran’s historic ally, Hamas. There are additional fears for the potential of Iranian cells being built amongst Israel’s Arab population. In response, Israel’s internal General Security Service has increased its own Iran focus, in collaboration with Mossad and IDF Intelligence Directorate staff.

The IRGC continues to demonstrate its global reach. In addition to the attacks revealed by McCallum, in November a Pakistani al-Qaeda-affiliated team under the auspices of the IRGC-affiliated Quds Force attempted the assassination of Israeli-Georgian businessman and former Jewish Agency representative Itzik Moshe in Tblisi. This followed Iranian assassination attempts on Israeli targets in Cyprus in 2021 and in Turkey in June 2022, when a coordinated operation between Mossad and its Turkish counterparts foiled a plot against Israeli civilians, including a former ambassador to Turkey and his wife.

Iran has long used Red Sea waters and the ports of its allies in Eritrea and Sudan to facilitate transfer of weapons to its proxies in Yemen and the Palestinian Territories and has continued to strike maritime targets. In November, in an incident attributed by Israeli and US security sources to the IRGC, an Iranian Shahed-136 drone struck the part-Israeli-owned oil tanker Pacific Zircon off the coast of Oman. United States Central Command (CENTCOM) also disclosed that in the previous week the US 5th Fleet operating in the Gulf intercepted a “massive volume of explosive material” being smuggled from Iran to Yemen.

Iran has also been active in the cyber sphere. Director General of Israel’s National Cyber Directorate Gaby Portnoi disclosed in December that his agency was “dealing with dozens of attacks a month from the Iranian side.” In November, Iranian hackers were able to penetrate and then broadcast security camera footage of the bus bombings in Jerusalem which claimed the lives of two Israelis. The UK’s National Cyber Security Centre has also reported Iranian attacks on British infrastructure

Israeli responses

Israel continues to strike Iranian and Iranian-backed targets in neighbouring Syria, consistent with the ‘war between the wars’ doctrine devised some nine years ago by then-Defence Minister Moshe Yaalon and then-chief of staff Benny Gantz to

degrade Iranian military capacity and halt the flow of advanced weapons.

Deconfliction mechanisms with Syrian President Bashar Assad’s Russian patrons are crucial to this policy, and relative Israeli neutrality over the Russian invasion of Ukraine – for which it has been much criticised by Ukrainian President Zelensky – should be seen in this context.

Israeli Air Force figures released in March of 2022 revealed that the number of missions undertaken in the last five years stood at over 1,000, while the last few months have seen several notable operations. In October, Syrian sources reported that the Israeli Air Force had attacked Iranian weapons shipments in Damascus and in southern Syria. In early November, reports emerged of a drone strike on a weapons convoy hidden in gas containers near the Syria-Iraq border, in which fourteen members of Iranian militias were killed.

IDF Chief of Staff Lt. Gen Aviv Kochavi took the unusual step of appearing to confirm Israeli responsibility for this attack. In an address at Reichman University on December 14, Kochavi spoke to the need for short notice decision-making informed by reliable intelligence when green-lighting such strikes. He remarked: “We could have not known a few weeks ago about the Syrian convoy...We could not have known what it contained, and we could not have known that out of the 25 trucks, that was the truck – truck number eight – was the one with the weapons.” Kochavi’s decision to break convention and publicly claim responsibility has been interpreted as a desire to illustrate the impressive reach and depth of Israeli intelligence. Late November also saw two other notable Israeli strikes. In the first, two Syrian army officers were killed in a strike on an airport serving the Iranian air force. In the second, four Syrian soldiers – including a brigadier general and a captain – were killed and one injured when the Israeli Air Force attacked Syrian military bases affiliated with the IRGC in Latakia and Homs. Further Israeli attacks came on the evening of December 19, as two sites were struck in the Damascus area, while Damascus airport was struck on January 1 2023 for a second time.

While most strikes target weapon sites, Israel has also reportedly targeted individuals connected to Iran. November saw the killing, attributed to Israel, of Col. Daoud Jafari, senior adviser to the Iranian Air Force in Syria. Jafari was killed using an explosive attached to his car near the town of Sayyidah Zaynab, close to Damascus and a known HQ for Iranian militia. Arab reporters noted that such suspected on-the-ground Israeli penetration of Syria had damaged the standing of Assad amongst Syrian regime loyalists.

Israeli operations sometimes incorporate a psychological warfare component. Mid-December saw an Israeli attack on Hezbollah facilities near As-Suwayda in Syria, close to the Israeli border. Leaflets were also dropped warning Syrian troops of the consequences of allowing the Lebanese group to operate in its territory. They read: "You bear responsibility for any damage caused by your decisions. Hezbollah's continued entrenchment in the area won't give you quiet. Hezbollah's presence is damaging to you and humiliates you, and you are paying the price."

On the maritime front, an IDF Naval officer is now permanently based in Bahrain as liaison to the US 5th Fleet in a sign of the security cooperation with Abraham Accord signatories. The fleet oversees US naval operations in the Arabian Gulf, Gulf of Oman, Red Sea, parts of the Indian Ocean and at three 'pinch points' (the Strait of Hormuz, the Suez Canal and the Bab al-Mandeb). In August Israel collaborated in a joint naval exercise in the Red Sea.

JCPOA "dead" as Iran progresses nuclear capability

Despite devoting political capital to renewing the JCPOA, the Biden

administration now believes it to be "dead". Nearly two years of talks between US and Iranian officials and involving the EU and remaining P5+1 countries (Britain, China, France, Germany, and Russia) brought no accord. On December 20, footage emerged of President Biden confirming that talks on a new deal were over.

The administration's foreign policy focus is now firmly fixed on Russia-Ukraine. Iran's military support of Moscow and severe repression of its domestic protests indicate that the chances of pro-active engagement in renewed talks from Washington look negligible at present.

Iran continues the rapid acceleration of Uranium enrichment. On November 22 it announced that it had increased enrichment at its Fordow nuclear plant to 60 percent – less than the 90 percent required for the development of a bomb but far in excess of the 3.67 percent cap imposed by the JCPOA.

The international community's ability to monitor the Iranian nuclear project is limited. Since February 2021, when Iran ceased cooperation with the inspections mandated by the JCPOA, the International Atomic Energy Agency (IAEA) has been forced to monitor Iranian activity through remote surveillance. In September, IAEA Director General Rafael Mariano Grossi delivered a report to the monitoring body's Board of Governors, and qualified that even were Tehran to resume cooperation, he and his staff would be forced to spend some time corroborating the accuracy of their surveillance data. The agency's lack of reliable information is exacerbated by missing footage caused by Iran's removal of 27 of the approximately 70 IAEA surveillance cameras in June.

The IAEA has admitted that it is, at present, unable to offer reliable intelligence on the development and purpose of Iran's nuclear activity.

CURRENT ASSESSMENTS CONSIDER IRAN TO POSSESS FIVE PRINCIPLE NUCLEAR FACILITIES

Fordow

Uranium enrichment and research

- Previously transitioned to a research facility under the JCPOA
- Enrichment activities resumed in November 2019
- Total (combined with Natanz) of 4515 advanced centrifuges and 7135 installed IR-1 centrifuges
- Iran has announced installation of 14 IR-6 centrifuge cascades for a total of 16: six IR-6 will replace currently operating IR-1 centrifuge cascades
- In November 2022, these IR-6 centrifuges began to produce 60 percent enriched uranium from 5 percent feed. The choice of the IR-6 indicates an accelerated path toward weapons-grade uranium

Natanz

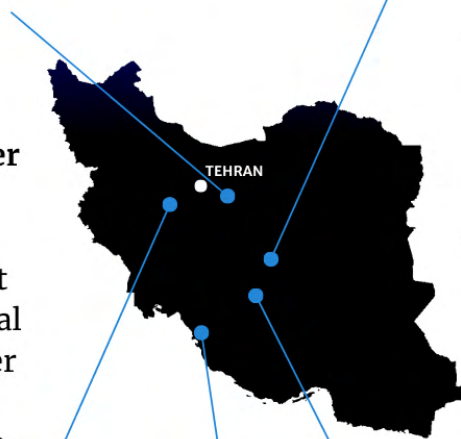
Research and heavy water production

- Home to two enrichment sites: one above-ground and a much larger one below-ground
- Total (combined with Fordow) of 4515 advanced centrifuges and 7135 installed IR-1 centrifuges
- Between the IAEA's September 2022 and November 2022 reports, 1740 advanced centrifuges were installed. Of these, 1566 are IR-2m centrifuges, organised in nine cascades. The remainder are IR-4 centrifuges, in one cascade
- Analysis suggests Iran intends to install another 18 cascades: six IR-4 centrifuge cascades; six IR-2m centrifuges; six cascades of as yet unspecified type
- A centrifuge assembly facility is under construction beneath a nearby mountain

Arak

Research and heavy water production

- Also known as IR-40
- Site of both 40 megawatt heavy water experimental reactor and a heavy water production plant
- Redesign required by the JCPOA to preclude production of military-grade plutonium
- 80 metric tons of heavy water originally intended for Arak was transferred to Oman in 2016 to circumvent the terms of the JCPOA



Isfahan

Research and uranium conversion and manufacturing

- In June 2022, the IAEA reported that 90 percent of Iran's 60 percent enriched uranium had been moved here
- IAEA surveillance cameras removed in June 2022

Bushehr

Nuclear energy production

- VVER V-446 Pressurised Water Reactor went online in 2011 with Russian assistance
- Undergoing expansion via Russian state-controlled energy company Rosatom, including a water desalination unit

Following Grossi's most recent report in November, its Board of Governors adopted a resolution proposed by the US and the E3 (the UK, France, and Germany) expressing "grave concern" over Iran's failure to comply with its obligations, but doing little more than wishing to hear better news by the time of Grossi's next report in March 2023. Iran rejected both Grossi and the Board's criticisms as being based on false information provided by Israel.

The IAEA also criticised Iran for continually failing to satisfactorily explain detected uranium levels at three previously undisclosed sites. Inspectors announced detections at Marivan and Varamin in January 2021, having already detected traces at Turqzabad in 2019. This latter find was prompted by material gathered during Israel's seizure of data related to Iran's nuclear programme in January 2018. Hiding nuclear material from inspectors is a violation of Iran's 1974 Non-proliferation agreement with the IAEA, and analysts have assessed that there could in fact be many more undeclared sites.

Even with the absence of reliable and contemporary IAEA data, Western intelligence agencies have unanimously concluded that Iran is on the cusp of 90 percent enrichment capability; hence US special envoy for Iran Robert Malley's November statement that Iran was "only a few weeks" away from reaching sufficient fissile enrichment for a bomb. Malley's prognosis was echoed by British Ambassador to the UN Barbara Woodward at the Security Council on December 19 and in comments by Zohar Palti, recently retired director of Israel's Defence Ministry's political-military bureau.

The IDF's Military Intelligence Directorate recently predicted that Tehran could use the imposition of harsh sanctions as a pretext for the introduction of 90 percent enrichment. With Iranian involvement in Ukraine increasing the likelihood of 'snap-back' sanctions from Europe and the US, the Directorate advocates for vigilant Israeli political and military preparation for such an eventuality.

Israeli perspectives on an Iranian nuclear deal

The Israeli intelligence establishment is divided on the question of renewing the JCPOA or seeking an alternative nuclear deal with Iran. The IDF Intelligence Directorate, has held that the JCPOA was the "least bad" option in allowing Israel and its allies greater, though not absolute, transparency in assessing the development of the nuclear programme. Recent reports have suggested that the Directorate will argue in favour of a renewed deal. The Mossad meanwhile opposes any deal which does not combine a long-term delay on Iranian capability with guarantees that Iran's ability to build up its non-nuclear military capacity and its support of terrorism are prevented.

At the political level, there has been near-universal cross-party consensus in support of the Mossad line opposing a nuclear deal. During its tenure, the previous Bennett-Lapid government adopted substantively the same position as its Likud predecessor and was firm in upholding the Israeli position that Jerusalem does not consider itself bound by the terms of any deal signed between Iran and third parties.

The consensus Israeli line has maintained that Iran has repeatedly shown that it cannot be trusted to fulfil its obligations under any new deal, and that Iranian determination is such that any deal can only delay, and not prevent, a nuclear-weaponised Iran.

The Israeli position also remains that the original JCPOA's 'Sunset Clauses' rewarded and normalised Iranian aggression, by providing for the lifting of restrictions on the transfer of conventional weapons to or from Iran after five years; sanctions on ballistic missiles after eight years; limitations on advanced centrifuges after ten years; and the ban on stockpiling nuclear material after fifteen years.

From its inception, the sunset clauses were identified by critics as an inbuilt weakness of the JCPOA and, absent modification, all these deadlines have now moved closer and render a return to the existing JCPOA irrelevant. Even in the best-case scenario, say critics of a modified deal, any provision substantively similar to the JCPOA can at best only afford the US and P5+1 a window of a year to prevent the development of an Iranian bomb, while sanctions relief provides the Iranian regime with funds not to alleviate its struggling economy, but to wage war through its proxies.

Conclusion

The UK's proscribing of the IRGC and wider European anger over Iranian support for Russia perhaps indicate that Jerusalem may increasingly find European allies more eager to support a tougher line towards Iran. This could include a recognition that the JCPOA is now unworkable, and a willingness to consider aggressive sanctions in place of a new deal. In a December newspaper column, former IDF Intelligence Chief Maj. Gen. (res.) Tamir Hayman urged Israeli diplomats to seize the moment to enlist European backing for an alternative approach to Iran before the sunset clause kicks in.

The IDF's Intelligence Directorate's annual report, meanwhile, assesses that Israeli actions in Syria have convinced Tehran that it cannot fully entrench itself in the country. Crucially, therefore, Israeli security analysis indicates that Iran will soon begin supplying Hezbollah directly in Lebanon, likely with cruise missiles and armed and precision-guided UAVs of the type it has provided to Russia. Should this occur, then Israel will be faced with an acute security challenge; striking targets in Lebanon is of an entirely different magnitude than targeting those in Syria.

The incoming Netanyahu government is almost certain to continue the 'war between the wars' policy of active engagement on Syrian territory. While this will likely require the continuation of deconfliction

mechanisms with Moscow, Netanyahu has previously indicated he will reassess the Israeli position on Ukraine on assuming office. Nonetheless, incoming Foreign Minister Eli Cohen recently promised the new government would "talk less" about Russia-Ukraine.

The latest evidence of mutual military supply between Russia and Iran could, however, shift Israel's security calculus significantly. Russian-Iranian ties are indeed growing ever closer, with both nations united in mutual relative international isolation. Moreover, Iran recently moved a step nearer to formal membership of the Sino-Russian-led Shanghai Cooperation Organisation.

Russia is also drawing back its forces in Syria for redeployment to the war in Ukraine and is therefore permitting increased Iranian troop presence (especially in Damascus) and the installation of Iranian anti-aircraft batteries. There is a growing awareness in Israel that with Russia so heavily invested in Ukraine, it is devoting significantly less focus to Syria.

Iran, meanwhile, looks set to continue with uranium enrichment. With talks seemingly stalled, all evidence points to Iran's ongoing refusal to comply with the IAEA and its continued acceleration of its progress towards a nuclear bomb.

US officials have reaffirmed the administration's commitment to using military action as a last resort to prevent an Iranian bomb, a prospect whose likelihood is now higher than it was a year ago. Whether Washington and its fellow-JCPOA-signatory European allies' current focus on the Iranian role in Russia-Ukraine intensifies or distracts from its attention to the nuclear issue remains to be seen.

Observers have called for a fresh 'Plan B' approach from the Biden administration. Former Israeli Ambassador to the US (and new Israeli Minister of Strategic Affairs) Ron Dermer has urged an end to the delusions of talks and a greater

appetite for US military action. Iran, Dermer argues, must be faced with a clearly expressed and credible military threat, in the form of a dramatic statement from Biden (or perhaps a bipartisan statement) and with the imposition of serious snapback sanctions by the US and E3 countries (the UK, Germany, France). A recent Bloomberg editorial, meanwhile, urged Biden to pursue a combined approach involving tightening sanctions to prevent the sale of Iranian oil to China, strengthening air defence network between Israel and friendly Gulf States, and equipping Israel with refuelling tankers to enhance its long-range strike capacity.

The level of recent US-Israeli military coordination perhaps indicates a greater US preparedness to consider joint military action – or at least the threat of it – to degrade or destroy the nuclear programme. In November 2022, a joint Air Force exercise simulated strikes on Iranian nuclear facilities; another joint exercise was also held in the first week of January 2023. Kochavi recently held talks over Iran in Washington and has deepened ties with CENTCOM in the last year. His counterpart, CENTCOM chief Gen. Michael Kurilla has visited Israel four times in his first six months in the role.

Were US-Iran talks to be resurrected, Netanyahu is unlikely to be reticent in stressing his opposition, though both he and Biden share a mutual determination not to allow any difference of approach on Iran to descend into the open acrimony of the Obama years; their personal bond is certainly far stronger, and it is possible that their relationship will follow the tone of the Bennett-Lapid government in dealing with differences ‘in the room’. Netanyahu seemed to confirm as much in a recent interview in which he stressed that should any disagreement occur over Iran, it would be “within the family”.

As a veteran proponent of diplomatic caution, Netanyahu is highly unlikely, except in the last resort, to risk regional conflict and destabilisation

by pursuing a unilateral Israeli military operation against the Iranian programme. Nonetheless, Israel has made preparations for the necessity of unilateral action. In late 2021, then-Prime Minister Naftali Bennett instructed the IDF to intensify its readiness for a strike. Analysts have assessed that Israel lacks the capacity for a unilateral destruction of the Iranian nuclear programme. Yet Palti’s recent remarks indicate that Israel’s increased capacity to significantly degrade the programme means that a unilateral strike – with, crucially, American consultation – cannot be ruled out.



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