



Trump and the Iranian nuclear project

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The photograph on the cover page was taken by Daniel Torok, who has released it into the public domain.

Key points

1

For the first time in a decade, the US has opened direct talks with Iran over its nuclear programme, while simultaneously threatening military action if an agreement acceptable to the Trump administration is not reached within sixty days.

2

In parallel, American military action in Yemen – together with the ostentatious forward deployment of naval assets in striking distance of Iran – is intended to signal that the US will not hesitate to use force if negotiations over a nuclear deal with Iran fail to achieve an agreement.

3

The US is demanding improvements over the 2015 nuclear deal (JCPOA) on four major issues of contention:

- time limits on nuclear activities,
- weaponisation capabilities,
- international inspections,
- ballistic missile programme.

4

While the basic points of contention between the sides remain unchanged from a decade ago, the larger geostrategic environment is dramatically different. So too is Iran's bargaining position. On the one hand, it is at a far more advanced stage in its nuclear development. At the same time, it has seen its proxy forces in the region degraded and under pressure in Lebanon, Gaza, Syria, and Yemen. And it has seen its own air defences largely rendered useless by Israeli strikes.

5

President Trump seems determined to reach a deal, one that he can convince himself and his constituents is better than the one achieved by President Obama signed in 2015. His choice of real estate mogul Steve Witkoff, a trusted non-ideological dealmaker that he has relied on in other foreign policy crises, as his envoy is further evidence that Trump is keen to make a deal, even – as seen in discussions over the future of Ukraine – at the cost of alienating allies or sacrificing long-held principles.

6

Israel is most directly affected by the outcome of these negotiations, but not a part of them. While Israeli action against Iranian capabilities and proxies has been leveraged to bolster the American negotiating position, it will ultimately be American, not Israeli, interests that determine the talks' outcome.

Introduction

President Trump's announcement in early April 2025 that the US would begin direct talks with Iran portends a major geopolitical shift, even if it has been less noticed than the drama around tariffs. The first direct talks took place on April 12 in Oman where Trump envoy Steve Witkoff and Iranian Foreign Minister Abbas Araghchi met to discuss a new nuclear deal. A second round of talks is due to begin in Rome later in April.

The new diplomatic initiative follows three other preparatory moves initiated by the Trump administration that directly affect the Iran question.

- **Maximum pressure sanctions:** On February 4, 2025, barely a week into the new presidency, the United States restored "maximum pressure" sanctions against Iran, including measures that sanction tankers carrying Iranian oil. This makes it difficult for Iran to export oil even to countries that do not care about other US sanctions on Iran, such as China — which currently buys most of the oil Iran does manage to export. These measures had been relaxed in the Biden administration as the previous president sought, unsuccessfully, to reach a new nuclear accord with Iran.
- **Attacks against the Houthis:** More recently, the US has embarked on a dramatic air offensive against the Iranian-backed Houthis in Yemen, one of Iran's last remaining regional proxies still able to operate more or less freely.
- **Carrier groups to the Gulf:** Additionally, the US has moved two carrier strike groups into the Gulf area, and augmented its arsenal of F-35 fighter jets and B-2 bombers on nearby bases.

The sum total of these moves is an implicit threat to carry out the kind of military operation against Iran's nuclear programme which had been all but practically ruled out in the Bush, Obama, and Biden presidencies, together with the first serious effort in a decade to hash out some kind of deal that might put the issue to rest.

Equally noteworthy is the role of Trump's lead negotiator Witkoff, who is not known for any strong ideological commitment on the Iranian issue. In this he is quite unlike most Republican foreign policy hands, the majority of whom are quite hawkish on Iran. Witkoff clearly has the president's trust, and he was widely praised by all sides for his work mediating the hostage and ceasefire deal between Israel and Hamas earlier this year. Trump has now given him responsibility for the portfolios of Gaza, Russia and Ukraine, and Iran, an unprecedented situation for someone who is not a cabinet member nor National Security Adviser, and who has no formal diplomatic credentials or military or policy experience. What unites all three efforts is an overriding commitment

to reach a “deal” that exceeds any commitments to diplomatic norms, international commitments, or the concerns of allies.

Moreover, some comments by Witkoff may hint at American openness to compromise. Statements made by American negotiator Witkoff in interviews after the Oman talks indicated that the US was willing to accept some measure of enrichment in Iran beyond what was agreed to by the Obama administration (although these were subsequently walked back).

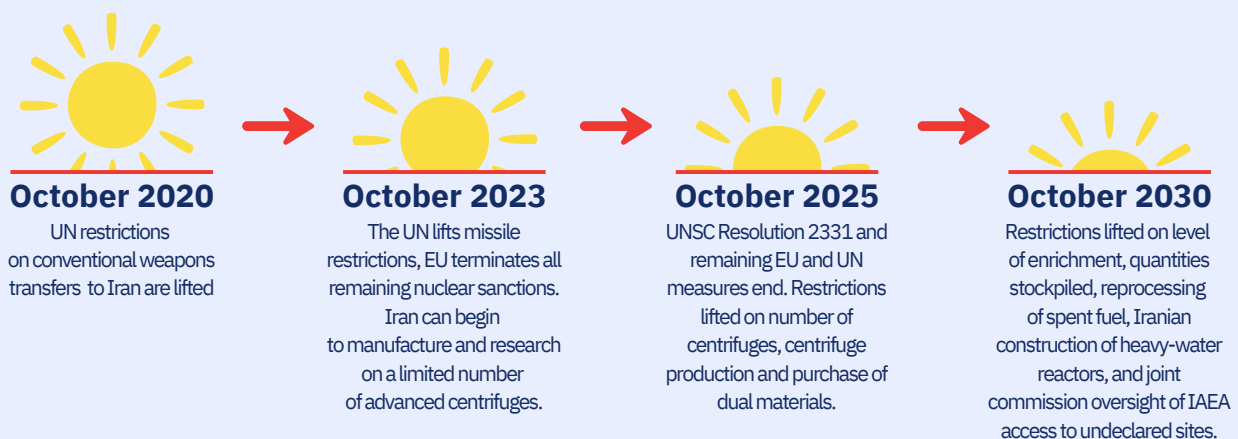
Towards a ‘better deal’? The JCPOA and its limitations

In 2015 Iran signed an agreement with the US, UK, France, Germany, China, and Russia to limit its nuclear activities. The agreement, known as the Joint Comprehensive Plan of Action (JCPOA), provoked great scepticism in Israel, Saudi Arabia, and among many US Republicans.

The agreement limited Iran’s ability to enrich uranium and even had Iran eliminating most of its stockpile of already enriched uranium. In exchange for these concessions, Iran received a large measure of relief from the international sanctions regime imposed on it in 2012. Objections to the JCPOA focused on four main problems: time limits, inspections, disclosures, and missiles.

- **Most of the limitations on Iranian nuclear activities in the JCPOA came with so-called “sunset clauses”.** Some clauses were due to expire as soon as 2020, and the last of the limitations would be lifted by 2031. For the Israelis, as well as for other opponents of the JCPOA, this was perhaps the worst aspect of the entire endeavour.

The JCPOA’s sunset clauses



- **The inspections regime imposed on Iran was, according to critics of the JCPOA, overly lax, and it gave the Iranians plenty of time and space to hide illicit activities.** The JCPOA did not require Iran to adopt the NPT's Additional Protocol, which would have granted the IAEA much more leeway to conduct inspections.
- **The JCPOA did not compel Iran to disclose all previous nuclear activities.** This makes inspections even harder to carry out, as so much of its earlier programme was secret and not necessarily discoverable by Western intelligence.
- **Lastly, the JCPOA was silent on Iran's ballistic missile programme.** It placed no limits at all on the development of the delivery system that would be used by Iran to attack its enemies with nuclear weapons — or, for that matter, with other unconventional weapons too.

In 2018, during Trump's first term, the US unilaterally withdrew from the JCPOA without coordinating the move with the other signatories of the agreement.

Once Biden became President, there were attempts to revive the agreement, but at the same time as this was occurring, the Iranians began violating the agreement's terms more ostentatiously than ever, notably restarting their enrichment programme, and accelerating greatly in the months between Trump's election in 2024 and his inauguration in January of this year.

What a difference a decade makes

The Islamic regime remains unpopular at home in 2025 just as it was in 2015. A wave of protests in 2022-2023 following the death in police custody of 22 year-old Mahsa Amini, arrested by religious morality police for not wearing a suitable head covering, has eroded its legitimacy in a manner not dissimilar to the wave of protests in 2009-2010 following the disputed results of a presidential election. The regime's internal difficulties and economic weaknesses are a backdrop to all its diplomatic dealings.

But three major developments have changed its bargaining position in 2025 in comparison to 2015. One is to Iran's clear advantage; the other two are not.

1

Iranian nuclear capabilities have greatly expanded since 2015. In order to produce a testable nuclear device, a country has to enrich large quantities of uranium to weapons grade (90 percent), create the chain reaction needed to detonate a bomb (weaponisation) and perfect delivery systems, i.e. to load the uranium on a military device that can create the chain reaction needed

to detonate the bomb. This requires knowledge and technical ability, and also components such as accurate detonators. It is estimated that Iran is one to two years away from achieving that objective.

Iran is reportedly operating over 15,000 centrifuges to enrich uranium to 20 percent and even 60 percent. At least eight other non-nuclear weapons states enrich uranium to 20 percent but Iran is the only one to enrich to 60 percent. It has particularly ramped up production of 60 percent enriched uranium since December 2024. Its overall stockpile of all enriched uranium is believed to more than five times larger now than it was before the JCPOA went into effect a decade ago.

Highly enriched uranium needs to be converted from its gas form into a usable metallic form, something Iran has been working on since 2021.

For the United States to thus insist on “dismantlement” as a goal this time around will require a lot more dismantling than it did the last time around.

2

Iran is much more vulnerable to an Israeli or American air attack on its nuclear facilities – or on any other strategic assets – than it was in 2015.

This is a result of Israel’s successful operation in October 2024 to destroy Iran’s air defences.

3

The “ring of fire” of regional proxies that Iran invested decades in has almost entirely collapsed in the past year. Militias such as Hamas in Gaza, Hezbollah in Lebanon, and the Houthis in Yemen amassed enormous caches of rockets and missiles aimed at Israeli cities. The threat to fire these was supposed to deter Israel from considering any attacks on Iran’s nuclear facilities.

In the last year, however, rather than the proxies acting as a shield for Iran, it has been the Iranians themselves who twice had to launch largely ineffective attacks on Israel in response to their proxies’ battlefield failures. Hamas in Gaza is a much diminished force, unable to fire almost any rockets on Israeli cities since the two-month ceasefire with Israel broke down in March. The more formidable Hezbollah arsenal was destroyed in an Israeli offensive last autumn which also saw almost the entire Hezbollah leadership killed. The Houthis have not been able to do any real damage to Israeli targets, and they are now the target of a large American air offensive.

Moreover, the client state that made all of Iran's ambitions in the region possible fell apart when the Assad regime was driven from power in early 2025.

The second development has made Iran more vulnerable than it was ten years ago, and the third has made it unable to threaten any real consequences to any potential attacker. Whether these are enough to counterbalance the first remains to be seen.

The American interest and potential negotiation positions

The US is demanding tougher measures in several areas of dispute: fuel production, weaponisation, delivery capability, disclosure, and verification.

1

Fuel production: On one major issue, the enrichment of uranium, the NPT treaty is surprisingly vague. Other countries that are non-nuclear weapons states but possess the capability to enrich uranium mostly achieved that capability before signing on to the treaty. With the exception of Iran, all are US allies or at a minimum somewhat neutral.

Over the past four years, Iran has built up a formidable stock of 60 percent highly enriched uranium, enough to make a crude nuclear device within months. Such a device could be used to conduct a nuclear test, but would not be easy to deliver to a target. It could conceivably be delivered by truck or ship, but would be too unwieldy to fit on the warhead of a ballistic missile. The capability to get to 60 percent indicates that Iran most likely possesses the know-how to get 90 percent or "weapons grade" uranium.

At this level of enrichment, Iran could conceivably make a nuclear warhead compact enough to fit on a ballistic missile. The US can be presumed to want to limit greatly Iran's enrichment capabilities, though red lines on this topic have been deliberately vague, with contradictory messages from different senior US officials.

2

Weaponisation: Having enough nuclear fuel for a device is not enough; Iran would also need to develop the means to trigger a nuclear detonation. Iran is making worrying progress nuclear weaponisation. In March 2024, American and Israeli intelligence agencies obtained information "that showed Iranian scientists were engaging in computer modeling and metallurgical research" relevant to nuclear explosive development.

The American position on this issue, usually referred to as “weaponisation,” is currently much firmer, and fortified by the reported destruction of a nuclear weapons research facility at Parchin in October 2024.

3

Delivery capabilities: Fuel and weaponisation are not enough to threaten Iran’s neighbours in the Middle East or rivals in Europe. It would also need to be able to deliver the warheads to their targets. This is where Iran’s wide-ranging and technically advanced ballistic missile programme comes in.

The JCPOA did not touch this topic at all, and the current American administration has made its insistence on limitations here very clear. The first round of talks fell almost exactly on the one year anniversary of perhaps the greatest demonstration of this lacuna – Iran’s massive ballistic missile attacks on Israel on April 14, 2024.

4

Disclosure: Another controversial issue left over from the JCPOA is the obligation to disclose all previous nuclear weapons related research and development.

This is a particularly difficult issue to agree on, because a lack of trust means that all sides anticipate the provision could be abused or only partially fulfilled leading to a ready-made excuse for leaving the agreement in the future.

5

Verification: Finally, the US is insisting that any new agreement include unlimited inspection provisions which would make it much harder for the Iranians to hide illicit development from international monitors.

The United States is also keen to secure a commitment from Iran to end its weapons and research cooperation with hostile powers such as North Korea, China, and Russia. Such a commitment could come separate from a formal agreement on the nuclear issue.

Beyond all that is Trump’s personal interest. He would like a deal – to win the especially one that convincingly appears to be better than the deal that Obama got in 2015. He may very well believe that a deal on Iran, possibly combined with a Saudi normalisation deal, could earn him the Nobel Prize he yearns for.

Trump likely prefers a deal to military attack. If Trump’s behaviour in the past is any guide, it is more likely that the threat of force and the ratcheting up of sanctions are meant as a negotiation ploy rather than reflecting his desire for military action.

A US-Iranian deal would not necessarily be an improvement on all dimensions. For example, an agreement to divulge past efforts more fully than what was included in 2015 would hardly assuage the concerns of Iran's neighbours, Israel included. Provisions requiring a very public crating and shipping of banned materials as happened with similar agreements in Libya and Syria could be the kind of spectacle that give a feeling of improvement even if the means left behind are still quite dangerous.

Moreover, this administration will almost certainly not agree to such a generous sunset clause as the Obama administration did. It may also insist on some new provisions regarding Iran's ballistic missile capabilities or even some kind of understanding regarding Iran's proxy armies throughout the region. It will, naturally, demand a full stop on all enrichment capabilities, but this is something the Iranians will almost certainly reject in all circumstances.

But if the Iranians do want a deal – and a senior adviser to Supreme Leader Khamenei said Iran sought a “real and fair” nuclear agreement – they will need to provide the President with something that he is satisfied makes him a better deal maker than his two Democratic predecessors.

The Israeli position

Israel finds itself in an unusual position as these talks get underway. Its vital interests are at stake, yet it is not at the table. While its military actions (more than any other development) have changed the reality on the ground, it cannot credibly threaten any further action as long as talks proceed. Its leader has the ear of the American president, but it is no position to marshal any domestic opposition to him in the event he agrees to an arrangement not suited to its concerns.

Israel's consistent policy is that the Islamic Republic of Iran cannot be trusted with a nuclear programme. And that there is no real doubt about the purpose of such a programme in a country with no energy shortage and an ideological and theological commitment to Israel's destruction, regularly reaffirmed, including by Khamenei himself on April 15, as negotiations were already underway.

Israeli Prime Minister Netanyahu and other senior officials have taken to calling their preferred outcome the “Libya option”. This is a reference to the 2003 agreement which saw Libya completely renounce its nuclear programme, dismantle all its unconventional weapons capabilities, and open itself up to thorough international inspections in exchange for a limited lifting of its diplomatic isolation.

In remarks to the media, Netanyahu said a diplomatic agreement with Iran was possible “but only if it’s a Libya-style agreement – where they go in, destroy the facilities, dismantle all the equipment under American oversight and execution. The second option, is that it doesn’t happen. In that case, the talks are simply stalled, and the other option is military.”

The most dramatic shifts against Iran’s standing in the region are largely thanks to offensive Israeli military action. Israel destroyed massive stockpiles of Hezbollah rockets and missiles and assassinated its leadership. Israel disabled Iranian air defences in its October 2024 attack on Iran.

Israel’s strike on Iran from October 28, 2024

Operational overview

- The Israeli Air Force (IAF) struck 20 targets in three different areas inside Iran.
- It is understood that the IAF successfully struck advanced long-range air-defence systems, several manufacturing sites for the Iranian ballistic missile programme, and storage sites for ballistic weapons.
- The operation involved around 140 aircraft of various types, including those for the attack itself, intelligence gathering, and contingencies for rescue missions. Over half of the crews were reservists, and four members of the flight crew were women.



Strategic impact

- The operation resulted in significantly degrading Iran’s ballistic missile production capability, neutralised its air defences, and exposed the regime’s vulnerability to the Iranian public and the wider region.
- For three hours after Israel had disabled Iranian air-defence systems, it had the ability to target any site it wanted.
- Estimates suggest that it could take Iran 2-3 years to reestablish capacity to build more ballistic missiles.



[Further information can be found in BICOM’s briefing.](#)

Israel took out the last remaining planes, ships, and weapons facilities during the fall of the Assad regime. But Trump’s announcement of talks neutralises any option of an imminent Israeli strike. Whatever threat Israel could credibly make against Iran in the past year has been, for now, effectively neutralised by the announcement of direct talks between Iran and the US. Israel cannot launch an attack on Iran while the US is negotiating with it. Moreover, if the talks succeed, it cannot realistically attack anyway. If they fail, it may be up to the US to carry out its own threats of military action.

Israel has been keen to explore the option of “snapback sanctions” being implemented against Iran. At least three signatories of the JCPOA — Britain, France, and Germany — have also raised this possibility as a means of pressuring Iran. These would follow a provision of the UN Security Council resolution that accompanied the JCPOA allowing for sanctions to be restored if Iran is in violation of the agreement without the need for a new resolution. In other words, a Russian or Chinese veto would not protect Iran from sanctions; only an entirely new UNSC resolution, one that would have to surmount an American veto, could do so. This provision only remains in effect for ten years after the original 2015 resolution, so it would have to be put in action by October 18, 2025.

Crunch time

This round of negotiations has a different tone and a different scene setting than the one that was concluded in 2015. Back then, the six major powers negotiating with Iran had competing interests but similar goals regarding Iran.

Today, the entire international system is riven by deep divisions over the war in Ukraine, tensions in the Taiwan Straits, and the crisis over tariffs. The pressure to successfully complete negotiations in 2015 emerged mainly from the severe sanctions regime that had been imposed on Iran only three years before. The threat of US-led military action was only considered a serious option in the event of a public Iranian push to develop a weapon. Today, the sanctions regime has long collapsed with no realistic way of getting global powers to agree on its reestablishment, and the US is threatening an imminent military strike if no deal is reached.

Moreover, the US is essentially conducting negotiations on its own, without input from the other powers and without any real input from Israel – though it is still relying on a threat of Israeli military action to nudge reluctant parties elsewhere to make compromises.

The administration has left little room to doubt that it will insist on tougher measures regarding weaponisation and verification. And an agreement this time around will necessarily include some reference to ballistic missile capabilities, something the previous one left out entirely.

At the same time, mixed messages from Witkoff on enrichment – later walked back by administration figures, including Defence Secretary Hesgeth and the President himself – potentially reflect ambiguity regarding American red lines. Witkoff's comments may hint as to where the Americans might compromise this time around, not as a moral concession to Iran but as a concession to the reality that is so different now compared to ten years ago.

Ultimately, if the administration intention to reach an agreement is sincere, then it is unlikely American negotiators will walk away from a deal that offers something less than complete dismantlement.

While Israeli officials have demanded the 'Libya model', American officials have taken a much more ambiguous position on their desired end state for Iranian capabilities. These positions sometimes even include public comments that are mutually contradictory, most notably in Witkoff's changing position on enrichment

capabilities. Moreover, in light of the collapse of the former Libyan leader Gaddafi's regime – due to NATO airstrikes that would almost certainly not have happened had he kept his nuclear capacity – Iranian leaders have little reason to accept the “Libyan model.”

If an agreement were to be reached, its content would cast a long shadow over US-Saudi discussions over a domestic civilian Saudi nuclear capacity. This would apply whether or not those discussions include normalisation with Israel, as well as to the various border conflicts Israel is presently fighting with pro-Iranian proxies – first and foremost in Gaza, but also in Yemen and Lebanon.

Additionally, Israel would have a lot less leverage to oppose a deal than it did in 2015. Angering the Trump administration puts too many other vital interests at risk, particularly when Israel is still bogged down fighting a war in Gaza. Moreover, while significant portions of the US policy community are committed to a hawkish line on Iran, there is no natural political constituency that the Israelis can count on to push either the administration or Congress to oppose a deal which might be inadequate from the Israeli perspective.

In 2015, congressional opponents of the Obama administration invited Prime Minister Netanyahu to address Congress, and pro-Israel lobbies in the US campaigned against the deal. These efforts were not particularly effective, anyway, and it impossible to imagine anyone trying to repeat them.

If an agreement is not reached some kind of aerial offensive over Iran is highly likely. The timeframe for this is not clear, but Trump did tell reporters that “We’ll be making a decision on Iran very quickly.”



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For more information please contact:

Richard Pater at richardp@bicom.org.uk