From JCPOA to TBD: Assessing the Prospects for Diplomacy with Iran

[00:00:00] Speaker 1: I am Andrea Mitchell from NBC News, and I just want to thank all of you for coming and our experts here, and good morning. Welcome to those of you here in Washington and all of you joining us online. And just to say we're meeting on Monday morning and we're talking about nuclear weapons and we're talking about peace, and so I just have to say the world is saddened by the loss early this morning of a peacemaker and of a great, I think a great spiritual leader. So we all mourn the loss of Pope Francis. But looking forward, I am so pleased that we have three wonderful panelists to talk about the Iran nuclear talks, the second round on Saturday with optimistic, positive statements from both sides. But we are here to drill down on what the challenges are and where the objectives of the two sides, assuming that Iran and the U.S. are the two sides, although there are a lot of outside players, including Israel, the Arab world, Europe, and everyone else. And we're facing some real deadlines in November with the expiration of the snapback sanctions. So there's a lot at stake, to say the least. And I'm so pleased that we have with us, first of all, Christopher Ford, Professor of International Relations and Strategic Studies at Missouri State's University School of Defense and Strategic Studies. He was the U.S. Assistant Secretary of State for International Security and Non-Proliferation in Trump I and exercised the authorities of the Undersecretary for Arms Control and International Security from October 2019 until his resignation from the department in January 2021. Before that, he served as Special Assistant to the President, Senior Director for WMD and Counter-Proliferation at the U.S. National Security Council in 2017, of course, working on Iran policy in the first Trump administration and has been a critic, publicly critical of the JCPOA, specifically those sunset clauses and its failure to address the missile threat and disruptive regional behavior by Iran. Richard Nephew is the Senior Research Scholar at Columbia's Center on Global Energy Policy. He was the inaugural U.S. Coordinator on Global Anti-Corruption at the Department of State from 2022 to 24. During his government career, he also served as the Deputy Special Envoy for Iran, Principal Deputy Coordinator for Sanctions Policy at the Department of State, and also Director for Iran at the National Security Council from 2011 to 2013. And Ali Bayez is the Crisis Group's Iran Project Director, Senior Advisor to the President. Previously he served as Senior Policy Political Affairs Officer at the U.N. Department of Political and Peacebuilding Affairs and was the Iran Project Director at the Federation of American Scientists. And I covered all of the JCPOA negotiations for many years in Europe and the conclusion in 2015 and, of course, the controversy over the withdrawal in 2018. So I thought we could start by talking about the differences in expectations and objectives for the two sides that were at the negotiating table through the mediation of Oman and how those different objectives, with Iran restating yesterday that they want to be able to keep their peaceful, what they say is their peaceful energy and medical programs, so not total dismantlement. They want sanctions relief. They want a declaration that the U.S. will not withdraw again and a declaration of non-military strikes. I'm just really categorizing it. There are other expectations and demands, of course. And the U.S. public demands have been, shall we say, slightly muddled between total dismantlement of all nuclear program facilities and infrastructure or the ability to keep a civilian program and as well what kind of agreement it would be and whether there would be still the continuing threat of a military strike, what would be the role of outside players, what role would Russia have in terms of taking the stockpile again? So all of this are these questions. Christopher Ford, first to you and then have each of our panelists answer,

how do you see the disparity in objectives of the two principal players here? And then we can go to the second question as to how to bridge those gaps.

[00:05:23] Speaker 2: Well, I think you've set that up quite nicely. The disparity in objectives, at least if you look at their public pronouncements, are really stark. And while I certainly wouldn't say that it's impossible to bridge that gap in principle, I think it's extraordinarily hard to do so in practice and I must confess I'm not very optimistic about it. I mean, Carnegie has gotten a bit of a flavor of the Iranian negotiating style in the past 24 hours or so, the disingenuous bait and switch kind of thing. Carnegie knew what it was doing and I commend you all for sticking to your guns on this, but this is going to be extremely hard. In terms of concrete Iranian negotiating objectives, my wager would be that perhaps first and foremost on their agenda is just drawing this out, making the negotiations last long enough without actually reaching a useful conclusion, but never seeming entirely hopeless either, to get through the threshold until October of this year when Resolution 2231 expires, taking off the table because of a prospect of a Russian or a Chinese veto in the Security Council, taking off the table any prospect of the resumption of full UN sanctions. If I were on the Iranian side, that would be my negotiating strategy piece number one because the moment that 2231 goes away without snapback having been invoked beforehand, we collectively in the non-Iranian world trying to see a solution to this problem will see the evaporation also of our most important potential piece of negotiating leverage. Now, when I say we, we did try in Trump 1 to invoke snapback. I think we had the better legal argument and nobody cared. The Europeans are now the empowered party. The EU3 is the empowered party with respect to UN snapback. And my impression from talking informally with European interlocutors is that the Europeans are actually potentially willing to invoke snapback, but probably only if they feel that the US is approaching this with a serious negotiating strategy that is able to deal with the challenges at hand. I don't think they're very eager to sort of roil their own relationships with Iran by doing snapback unless it contributes usefully to a negotiating answer here. But it does not appear that the US has yet convinced the Europeans that they are serious enough to bring us to that point. So that's in some ways the challenge for both sides right up front. Can we get out in front and essentially defeat the initial Iranian strategy of dragging this out through October when our negotiating leverage turns into one thing and one thing only and that's B2s. That's not an environment which I would like to be negotiating and I very much hope that our negotiators from the United States side are able to keep out of that quandary, but I'm not sure of it.

[00:08:06] Speaker 1: Okay. Richard, nephew?

[00:08:08] Speaker 3: Yeah. Look, I think a lot of what Chris said is right. I can see- We're going to get each other in trouble here. We are. We are. We should keep all the tomatoes away. So look, I think a lot of what Chris said is right. I would back up a little bit when it comes to the Iranian position because I think their actual entry point is see what they can get. See what they can get out of the United States. See what they can get out of the Trump administration because I do think we're already seeing this play out in the press. We're seeing this play out in Twitter and public statements. There are splits within the Trump administration presently about whether or not a deal is even an advisable thing, let alone a deal that would have any kind of compromise to the Iranian position. And I think the only credible deal that you could structure with the Iranians under the current government in the current context is one that's going to have uranium enrichment continuing in the country in some capacity,

and that for some folks in the Trump administration is a no-go. I think other parts of the Trump administration have demonstrated that they are prepared to go with something that is softer. What softer means, how far it goes, is, I think, up to some amount of debate. I think if you look at the plain text reading of what the president and what Whitkoff have said, one can read into that a much looser, much, much softer deal. And I think, look, if you're a basaraki, you have to be trying to see what you can get and see whether or not you can get a concessional deal that puts you in a better position that gets sanctions relief with fairly minimal nuclear concessions, something I think that would be pretty consistent with what the Supreme Leader has said.

[00:09:35] Speaker 4: Ali, may I ask? Thank you, Andrea. And I would also thank Carnegie for organizing this discussion. Look, I would, with all due respect, disagree a bit with my colleagues here. I don't think the Iranians have an interest in dragging this out, and I'll say why, but I think it's really important this time around to try to get the Iranian intentions right. I think they have an interest in actually getting a deal quickly for several reasons. One, sanctions relief is an absolute necessity now. Now, you can misread into that and think that we have plenty of leverage that we can force them to surrender and to do things that they were reluctant to do in the past, which is, for instance, the Libya model of dismantling their nuclear program. That policy has an unblemished track record of failure over the past 20 years. So I'm not going to get into that, but the sanctions relief part is really essential because the Iranians are literally struggling to keep the lights on. They have serious energy shortage issues, which are pretty rare in Iran in the winter. They usually happen in the summer when they have to turn on the ACs. So that is just indicative of the fact of how bad things are going to get in the next few months. Economically, if you look at the currency, it lost about 50 percent of its value just in the first six months of President Pesashkian coming to office. But they also want sustainable sanctions relief because of the JCPOA's experience, right? In their view, sanctions relief was neither effective nor sustainable, so I think this is going to be one of the most contentious issues in these negotiations, and Richard knows this well. This is one of the reasons the Biden administration couldn't revive the JCPOA when they were negotiating with the Iranians. And there is also the reality that the risk of war is now much more credible than it has been in the past. It's not because we've parked six B-2s in the Pacific, but it's because of what happened last year between Iran and Israel and the fact that the taboo of direct Israeli strikes on Iranian territory have been broken now. So the risk of war is real. So when you look at the incentives and disincentives, the Iranians definitely have an interest in moving quickly towards some sort of an agreement, and we can discuss what parameters that could have. But there is no scenario in which they believe that they can get over a snapback expiration without some sort of a deal, an interim agreement, or something that would cap or roll back their nuclear program. And if snapback happens, then it's a Gordian knot that is really impossible to untie, because then you would need the P5 to be exactly on the same page on this issue, to put the genie back in the box. Snapback of the UN sanctions would push the EU to also snapback its own sanctions. Then you need consensus at the level of the 27 members in the EU, which is very difficult to get, especially Eastern European countries who are not as worried about Iran's nuclear program as they are about its relations with Russia, et cetera. So this becomes just so much more difficult to resolve, and take what the Iranians would do in response to snapback as well, which is to withdraw from the NPT.

[00:13:03] Speaker 1: Let me pick up on that, Christopher, because of the time frame. Steve Witkoff has said he wants a deal in 60 days. For those of us who've watched the technical aspects of this in the past, and the disparity in expertise of the two negotiating teams, to put it kindly, a lot of expertise in one respect in that Steve Witkoff really knows the president and his desires and his parameters better than anyone, perhaps. And so with all the dissonance coming out of the side, I covered negotiations with Ernie Moniz and comparable experts on the other side, and so it just seems to me that they have to enter their frame, and maybe they are this Wednesday when the second meetings or the first meetings with technical advisors. But the expectations to get this done quickly and the patience factor of both the president, frankly, and Israel, given the military weakness right now of Iran compared to past years, when they've lost the air defenses in the July retaliation by Israel against the Iranian preemptive strike.

[00:14:23] Speaker 2: Well, once again, I think you've pointed to the two huge challenges right now. It is a powerful advantage to have one's head of delegation have a close relationship to the ultimate decision maker. That's certainly true. It is also a huge disadvantage to be behind the curve in terms of technical knowledge of what you're actually negotiating over. We don't know who the technical team will be supporting the U.S. side at this point. That's absolutely critical to how it goes forward. I have very limited engagement in direct talks with the Iranians on these issues. I myself engaged with Arachi when he was, I think, deputy foreign minister some years ago, shortly before we pulled out. It's very clear that in these kinds of things, and the same thing can be said about the U.S. and the Russians. I remember sitting down across from Russians who have decades of experience on the very issues that I was talking about. I thought I was pretty good on the U.S. side with 10 to 15 years. There's been an arms race for expertise in this, and I was telling someone before this event these are skill sets that are experientially grounded. You build them. You develop them over time. You don't have a prodigy nuclear negotiator like you have a prodigy four-year-old Mozart in composing concertos. You've got to get here through experience, and we need to make absolutely sure that people who are at the table supporting the U.S. discussions have that kind of expertise because they'll absolutely be up against seasoned experts who have been doing this since the early 2000s. That's a losing game unless you are very careful about building your team right, so I'm crossing

[00:16:01] Speaker 3: my fingers. Just to add a couple of thoughts, I'm finding myself kind of unwillingly but forcing myself to be an optimist on this, so let me stick with that for a minute. There is a lot of homework that was already done. The JCPOA exists. Now, large parts of it at this point are overtaken by events. Things like the restrictions on centrifuges, for instance, Iran's advanced centrifuges are well beyond what we were negotiating with in 2013, 14, and 15, but look, there are some structures there. There are some concepts there, and that those can be barred, but ultimately, again, I agree with Chris that having expert-level engagement on these things is going to be important, and having expertise amongst the heads of Dell is also critically important, and people who are able and willing to get up to speed very quickly, and I think when you look at Wyckoff, I don't know the man personally, but I do know the number of files he's working on. He's working on Russia, Ukraine. He's working on Gaza. He's working on this one, and it seems like on alternating Saturdays, he's going to be in a position to talk about these sorts of issues. That's not a recipe for a tremendous amount of success, and I entered the JCPOA talks

with a full head of brown hair and don't have that anymore, and there's a reason for it, and that goes to the nitinoid details that are involved in getting these sorts of things right. Now, this is where I think we have to step a little bit back and think about what kind of agreement are we talking about. If Wyckoff wants to get a deal in 60 days, and we're already at day, like, 50 or something like that, then the kind of deal that we're actually looking at is going to be something that is interim, that is short, that is placeholder, and you could potentially do a lot with that if it holds back certain nuclear advances, but let's be really serious about where we are right now. The Iranians are six to seven days away from being able to produce enough HU for their first nuclear weapon. They are very, very close to breakout, and I am not sure it's very sustainable for us, for the Israelis, and for the crisis situations that always seem to evolve in the Middle East to be that close. So a short-term deal that gets us past the 60-day mark, maybe, but a longer-term deal, it's going to require a lot more technical detail, and I think the jury's out.

[00:18:09] Speaker 1: Any deal that involves rolling back. Let me get Chris to jump in for a second, because the criticism, the chief criticism of the JCPOA was that it didn't involve, it didn't cover missiles or delivery systems, and to say nothing of terrorist proxies. So would that be acceptable, and then, Ali, you jump in as well. Is it acceptable to just have something that deals with the initial breakout threat, which is dire and which has been cited by not only the Trump White House, but in closing statements from Secretary Blinken?

[00:18:47] Speaker 2: I think it would be very problematic to have anything, even in a short-term deal, that didn't deal with that immediate breakout threat somehow. You could perhaps argue for working the terror proxy issue and the missiles issue later, although, of course, the Iranians have said those are off the table to begin with, right? But they've also said that taking back their, anything back from their enrichment capacity is off the table as well. So I don't know quite what you do with that, but the closest fish to the boat is clearly the nuclear peace, but I'm not sure how you get there in 60 days, because nothing that would look like a deal that even has a chance of handling the general problem of Iran being essentially a bad mood away from weaponization, nothing that can handle that in the slightest doesn't involve some degree of rolling back fissile material production capacity and stockpiles. I don't know how you get there in 60 days. God bless them if they can, but I think that's almost undoable.

[00:19:41] Speaker 1: Well, let's stay focused on breakout and the timeline, Ali, because we know it would take a year or more to have a warhead miniaturized and all for a missile, but what about the reports also that there is a cruder device that could be developed more quickly?

[00:20:00] Speaker 4: If I may just add on the question of U.S. technical team, you know, one thing that is different in these negotiations compared to even the Biden administration talks, which were indirect as well, is that the intermediaries at the time were the Europeans, the E3, France, U.K. and Germany, who had tremendous amount of technical expertise and institutional memory on this file. And so even if there were shortcomings, which there were not in the U.S. team, at least the intermediary could help. Now, the Omanis are fantastic in trying to create a good environment for negotiations, but they don't have the technical expertise. So this is another layer of complication here. And also, in general, I'm not in favor of adding the missile issue, which is a conventional weapons issue, right directly into the nuclear

talks, given the short timeline that we have, the complication of the issues, the enormous amount of mistrust that we have. It's a formula for basically sinking these negotiations. But it could happen in parallel. And Iran actually has established a track record with the Biden administration in 2023 in coming to unwritten understandings on non-nuclear issues. For instance, Iran committed not to transfer ballistic missiles to Russia for use in Ukraine in 2023, or that its proxies in Iraq and Syria will not attack U.S. forces there. Again, this wasn't an official deal, but it was an understanding that was mutually beneficial. And that kind of stuff, I think you can do in parallel to the nuclear negotiations. And look, on the question of breakout, let's be honest, that ship has sailed to a large extent in the sense that even if we go back to the JCPOA or some tougher measures, I don't think we would get the 12-month breakout timeline that existed in the deal. But the question is, is that necessary? If we get six months or four months, is that good enough? And I think we have had this experience in Trump, one, that we allowed the perfect to be the enemy of good enough, and the situation only became significantly worse. If we are saying now Iran is just a few days away from breakout, it's because of that decision to withdraw from the JCPOA. And I'm hoping that this time people are pragmatic enough to understand that creating more space between Iran's potential weaponization and civilian nuclear program is good, even if it's part of an interim agreement and not a final solution. Did I answer your question? Yeah, absolutely.

[00:22:49] Speaker 1: If I can, can I just pick up on that real quick?

[00:22:51] Speaker 3: I mean, so one of the issues on the weaponization timeframe, though, is it's not as certain, and it's not something we can estimate from outside, right? With a certain number of known centrifuges and a certain amount of material, lots of people in this room can figure out what the breakout time would be of that. The problem with weaponization is that there's a lot of stuff we don't know. And even though we have learned more, the Israeli coup in taking the nuclear archive a few years ago has given us a lot of insights into what's going on. The reality is there is still a lot we didn't know about the past weaponization program. There's a lot we don't know about it now. And there is the possibility of significant strategic surprise, especially if we think about something that's cruder. And again, in this conference, everyone in this room knows that while, yes, a missile launchable warhead is the kind of thing they're probably aiming for, there's a lot they could do with a cruder device. And while it may be rocket science, it's not new rocket science. And it's something they could do. I think Chris Ford would agree. Those are good points.

[00:23:49] Speaker 2: And I would actually add another wrinkle here, just to make it, God help us, more complicated. And that is the issue of duration. It was, you know, the criticism, I mean, and this is, it's particularly salient that these are criticisms from the first Trump administration, because he's now the fellow sort of in charge of trying to get to a new deal. And so he has his own benchmarks to set, you know, and whether he will end up looking, whether Whitkoff will end up looking embarrassed by comparison to Mike Pompeo's speech at Heritage Foundation with the 12 points of things that must be in a deal, whether we're going to look like we're doing sort of Obama-lite now, and whether that's going to be acceptable to the Oval Office. That was exactly what I was going to say.

[00:24:24] Speaker 1: That's anybody's guess.

[00:24:25] Speaker 2: But there's an additional wrinkle here, too, and that's the issue of duration. Because one of the, you know, it was not just a criticism of the JCPOA that it didn't touch missiles or terrorism proxy or destabilization. And by the way, on those fronts, I don't know whether it's bad, it's, you know, there's some things to be hopeful about, right? I mean, the Iranian strategic position in the Middle East with the fall of the Assad regime and the grievous damage that Israel has done to Hezbollah and to Hamas as regional proxies, those may actually cut in favor of being able to talk about that issue more. But one of the other criticisms of the JCPOA that President Trump made very clearly in October of 2017, which set me and Brian Hook off talking to the Europeans like crazy, trying to figure out whether there was a way to solve this. Was the problem of the duration of the restrictions, right? I mean, we talk about how, gosh, we, you know, Iran is in this position of being in a breakout capacity because the U.S. pulled out of the JCPOA. Well, yes, in terms of timing, but don't forget, in five more years, Iran would be able, perfectly able, under the JCPOA to have had exactly what it has right now, when all the restrictions on the stockpile capacity, the enrichment capacity and the stockpile numbers would come off. So the JCPOA was going to go away in terms of its restrictions upon Iran's program. And so one of the key desiderata here for a new deal would be, can we have something that is, in fact, indefinite, you know, enduring in duration? And that's going to be a hard piece as well, especially with the Iranians claiming that their supposed right to enrich is entirely off the table. So that's another piece in this that I don't want to omit.

[00:25:56] Speaker 1: Well, let me throw out another issue, which is the Houthis, because the White House is appropriately concerned, as are global leaders everywhere, about the economic impact of not having the Suez Canal for global trade, especially now, when other costs are about to go up or already are. So can Iran, which has, according to assessments that I've seen reported from our sources and others, has less control while arming the Houthis, less control over Houthi operations than it had over Hezbollah and Hamas, maybe less direct operational control? But can Iran control the Houthis, which has required so much vigilance by our military in the region and has so impaired global trade? Richard, first to you, which you can all weigh in.

[00:26:55] Speaker 3: Yeah, I mean, look, my two cents on this is control is probably outside of what the Iranians are able to do. But, you know, if you take away resupply, that makes it hard for the Houthis to do certain things. But the Iranians are also not the sole resupply vehicle that the Houthis have as well. So, look, I think the Iranian command and control apparatus around its proxies has been at times overstated. You know, they certainly have closer relationships with some elements of their proxies than others and more ability to direct parts of their proxy network than others. That doesn't mean it's not a problem that they have a proxy network and that proxy network is threatening not only U.S., but partner and I would say global.

[00:27:34] Speaker 1: Should that be part of this deal?

[00:27:36] Speaker 3: Well, this is where I come back to, and here we'll find a nice part of disagreement. You know, when we think about issues around duration of the original JCPOA, and we don't need to relitigate the entire sunset debate, but there is a observation here, which was we would not be starting in five years with where we are today because the Iranians have been working on their nuclear program and trying to perfect their centrifuge and similar since we withdrew. So, there is a period of time, call it six years, call it seven years, whatever you want to say, in which we

would have had more time and space to be working on something that isn't the nuclear issue. And to my mind, the best way to have dealt with the time and space we got from the nuclear issue would have been to have a better negotiation on regional issues that dealt with missile threats, dealt with drone threats, support for the proxies and similar. But the problem is that we didn't do that, and so instead we are now both simultaneously trying to deal with a regional issue that is quite toxic as well as a nuclear issue that is once again quite toxic. The space for doing those deals now has shrunk, especially if the U.S. has got to think about its core strategic interests. And I think when you hear members of the current cabinet talking about we need to make sure Iran can't launch a nuclear weapon using an ICBM at the United States, this is part of the reason why it's hard now to get to the Houthi issue and to try and have a negotiation on that because we're right back to where we were supposed to have been past with the JCPOA.

[00:29:02] Speaker 1: But arguably, Iran's weakened posture, both economically and militarily, has improved the chances of a successful negotiation. Christopher?

[00:29:13] Speaker 2: Well, I was going to make the same point that Richard did about the Houthis in the sense that I don't know whether Iran has any sort of really fine degree of operational control, but if the Houthis don't have it, they can't fire it, right? So there is a piece of this that Iran has completely within its control, and that's not hard to fix, you would think, but they just have to agree.

[00:29:30] Speaker 1: Let me jump to questions from the audience now because we already have some. Matthew Goldman is asking, does the ineffectiveness of Iran's air and missile attacks on Israel we were just speaking of have any implications for easing demands for Iran to constrain its missile program?

[00:29:51] Speaker 4: If I may, on the question of Houthis, I just wanted to add that I agree that Iran doesn't have control over the Houthis. It has influence, but I agree with Chris that the most important element here is arms shipments. And in fact, there is precedent for Iran committing not to send arms to the Houthis in its agreement with Saudi Arabia in 2023. Now, that agreement wasn't fully implemented because October 7th happened and the geostrategic dynamics in the region changed, but there is now the reality that Iran, for instance, cannot send weapons to Hezbollah because the land route through Syria doesn't exist anymore. The air bridge to the Beirut airport doesn't exist anymore. So there are things that are now possible that were not possible even six months ago that you could come up with. But again, not as part of the same negotiation, but a parallel set of understandings. On the question of, I think one of the problems we have in this town is that we start believing our own rhetoric and this idea that Iran's air defenses have been completely decimated and Iran is completely defenseless is absolute nonsense. Yes, the Iranians have been weakened, but they are not weak. You know, for a country, the second Iranian attack against Israel in October, 200 ballistic missiles with a degree of advance notice, not as much as was the case in April, but a degree of advance notice. One third got through multi-layered Israeli defense systems, targeting only three military sites. Imagine if we're talking about 1,000 missiles, 1,500 missiles, without advance notice, maybe in coordination with the Houthis and Hezbollah, whatever remains of its capacity. This could get very ugly very quickly if we think that, oh, Iranians are so weak, they're so desperate, and there's a very easy military solution. If not, we can get everything we want at the negotiating table. We would be up for very nasty surprises, I think.

[00:32:02] Speaker 1: Chris Ford, Christian Trotti is asking, has the degradation of Iran's terrorist proxies over the last few years significantly changed the landscape of these negotiations? Does Iran have less leverage or more?

[00:32:16] Speaker 2: I would say I hope it has. And my instinct is that it, I mean, has it enough is the question, but I think it must have to some degree. I mean, at the time when we were trying to engage with these things in, say, late 2017, early 2018, and thereafter, the Iranian axis from the Gulf to the Med was pretty robust. And you had the Assad regime that was coming out of, for them, the happy end, unfortunately for the rest of the people of Syria, the unhappy end of the civil war. You had a situation in which dealing with the regional proxy destabilization issue would have required Iran to agree voluntarily to a massive standout of its regional posture that has been a major point of pride for the revolutionary regime and a major source of the IRGC's power and prestige inside the Iranian hierarchy. So asking them to walk back that circa 2019 was a hell of an ask. Asking them to walk back something that is in tatters right now maybe is easier. So some cautious optimism, at least there.

[00:33:24] Speaker 1: Elaine Grossman, Richard, is asking, how might Netanyahu's seemingly domestic political need for the continued existence of an Iranian threat factor factor into the Trump team's interest in an agreement that meaningfully constrains Iran's nuclear weapons capacity and possibly its longer-range delivery vehicles as well?

[00:33:44] Speaker 3: I mean, look, I think different people can disagree on this, but I actually don't see Netanyahu's core objective being to have the Iran issue that he can bandy about. I take him seriously when he says that Iran represents a existential threat to the State of Israel that he believes it's his responsibility as prime minister to prevent a second Holocaust. I take him at his word there. And so I think when Netanyahu talks about the Iran issue, there is absolutely a political element to it. But I think that he is actually quite concerned, and he sees a reason to be concerned with what he sees in the nuclear issue. He sees it in Iranian rhetoric. He sees it in missile forces and similar. I think the way in which his political fortunes play into this is actually quite the opposite. It makes him more understanding of the fleeting nature of power and the fact that he is at risk here. He's got a very fragile political coalition. It could fracture for any number of non-Iran-related reasons, and he could lose power and never see it again. And I think the perspective I have gotten from Israeli officials over many, many years of engaging with them, both under Netanyahu's premiership and not, has been that he really thinks he lost his chance in the past to deal with the Iranian nuclear program forever and ever and ever. And so I think his pressure on the Trump administration will be, do not let this opportunity go by. Now, I disagree to some extent about whether or not the approaches that he's recommending make sense and whether or not they would achieve that objective. But if we're trying to get in his head a little bit, I'm not convinced that he wants to have this boogeyman that's always out there. That's a second-tier priority to his first one, which is preventing that boogeyman from coming to Israel. No, I happen to agree because during the UN General Assembly,

[00:35:39] Speaker 1: I attended a briefing with a senior Israeli official who can only be so identified, who said that there is an existential threat and that there is a timeline that the Supreme Leader has of eliminating Israel from the face of the earth by 2040. And so they are very much feeling that, and that is based on their

intelligence. And it's not hypothetical anymore. We now have two instances in which there have, in fact,

[00:36:05] Speaker 2: been long-range fires in Israel. This is not... I mean, it was bad enough when it was hypothetical and still pretty darn clear, but this has been concretized in a way that must be very attention-getting. Well, to that point, before I get back to the questions,

[00:36:18] Speaker 1: there was, just a few weeks ago, the Sunday Meet the Press interview with my colleague Kristen Welker, where the president re-emphasized, and I've seen that transcript. He said it several times. That if Iran does not agree, they will be bombed the way they've never been bombed before. But then, by the same token, while keeping that threat out there, he made a point of signaling his interest in direct talks in the Oval Office to the surprise of Netanyahu when he was visiting. So, how are you reading that, Chris Ford? I don't know how to read those things.

[00:37:02] Speaker 2: I don't know how to read those things at this point. I mean, the degree to which these things are done pursuant to some elaborately sort of Byzantine signaling strategy versus the degree to which they are from some visceral gut-level place improvised on the moment is hard to figure out. In theory, that can be a strength in negotiating. In practice, it can also perhaps be a major problem. I don't know how to handicap that one, I'm afraid.

[00:37:31] Speaker 1: This is the most honest and accurate answer that any of us could possibly get. If I had said I understood all this,

[00:37:37] Speaker 2: you should throw me off the panel immediately.

[00:37:38] Speaker 4: Can I just add on this? President Trump might not necessarily understand the technical details of a lot of these things, but he has direct experience with the question of the Libya model, which is what basically doomed the negotiations with North Korea. In 2020, in fact, publicly went after John Bolton of saying that his insistence on the Libya model is one of the reasons that our diplomacy with North Korea didn't succeed. So when Bibi comes to the Oval Office and talks about the Libya model or dismantlement, that's something that the president is familiar with and knows does not work. So that's important to take into account. There's some irony there, of course,

[00:38:21] Speaker 2: because the Libya model, when John Bolton was in the decision-making chain for that sort of thing, in fact, was a success. It was actually the subsequent decision when Bolton was long out of power, that the subsequent decision to go bomb and depose Qaddafi that made the Libya model now a poisonous thing in the mouths of North Koreans and Iranians. There was a time in which the narrative that if you get rid of your WMD program, we will relax sanctions and you can reach massive economic deals with American oil companies and that sort of thing, that was actually a success story for quite a while. And to, you know, in John's defense, he had nothing to do with it going bad. That was a decision by the Obama administration.

[00:38:56] Speaker 1: And of course, and there's also the experience of the Soleimani hit and the impact of that. And so the regional actors are all aware of that. Nicole Grajewski is asking, what kind of concessions is Iran willing to make on

weakening the axis of resistance? Now that there's a possibility that the popular mobilization forces in Iraq would be integrated, subsumed into regular security forces, will Iran be willing to accept some constraint on its support? Could US and Iran reach some informal understanding on regional affairs like the less for less agreement pre-October 7th? Richard.

[00:39:35] Speaker 3: I mean, look, I think there is a strategic rethink that's going on in Tehran right now because they saw what happened with the proxy forces and the fact that the Israelis were able to deal pretty handily with Hezbollah. And they saw what's left of Hamas after October 7th. And they've seen what's going on in Iraq and similar. So I think if you are an Iranian strategic thinker and you are not sitting back and saying, okay, did this work? No, it didn't. Okay, what should we do next? That gives an opportunity for some kind of engagement. I think we should temper expectations though. The Iranian perspective is, as I understand it, and Ali should definitely weigh in here, is informed by the experience of the Iran-Iraq war and the desire to keep conflict as far away from Iran as possible. And that means that there is still an incentive to rearm Hezbollah. There's just maybe not the capacity, especially with Syria gone. So I'm not sure that the Iranians agree to some sort of permanent, we will no longer arm groups outside of. But there may be ways in which you could adjust what that support looks like. Whether or not we can accept that, whether or not the Israelis can accept that, different question. But my own thinking on this has been motivated by trying to stop the spread of drones, cruise missiles, ballistic missiles to places outside of Iran to try and restrain what their proliferation activities look like, which has a positive impact not only on the United States and our security, but others as well. Maybe there's something there. But I think it all comes back to what the conclusion of the Iranian strategic thinking exercise is. It's worth noting that one of their conclusions might be, no, proxies don't work. You know what works? Nuclear weapons. We should do that. And they're six to seven days away from having enough HEU for their first bomb. So to my mind, this strategic rethink, which may be positive in some sense, could also be incredibly negative in other senses.

[00:41:31] Speaker 4: Ali? So as I said, I think there are things that are now possible just because of the fact that the ground on which all of these proxy wars happened has shifted significantly. And I think the Iranians would be willing to make compromises on the regional policy as well. To what extent they would go, again, it's a bit like the nuclear issue. They would not go for full dismantlement. They would probably go for restrictions and some trust-building measures. But what is really critical to understand, Andrea, is that this is not a question of money. Connected to previous discussion about Netanyahu, is that in this town, one of the cliches about dealing with Iran has been that if it's a mutually beneficial deal in which Iran would benefit, that money would end up going to the proxies. For a long time, I've believed the problem in the eyes of many in D.C. and in Jerusalem is that the problem is not uranium enrichment, it's Iranian enrichment. And if that's your problem, you're basically arguing for no deal. The real issue in terms of the way Iran projects power is not about how much money they have in their bank account. These groups, I mean, this whole entire policy is designed in an asymmetric, low-cost way. They've been able to sustain it at times of economic boom or bust, so there's a track record that it's sustainable for them. It's a question of threat perception. And I think a deal that changes the nature of Iran-U.S. relationship, which in many ways I think that is what the president is interested in, that is, there are some elements in what the

Iranians are offering, including U.S. skin in the game, American companies entering into the Iranian market. It was in the Iranian foreign minister's op-ed in the Washington Post. That kind of stuff, I think, creates a different environment in which the Iranians would have less incentives to go for policies that they know would undermine their plans for economic development.

[00:43:35] Speaker 1: Well, related to that is a question from Ana Bartu. What do you think Iran would need, Ali, in a new arrangement to give it reasonable confidence the U.S. would live up to its side of the deal?

[00:43:46] Speaker 4: So there are several things. One is that I think they believe that President Trump is much better placed to marshal two-thirds support in Congress for a deal to become a treaty. Now, they know a treaty is difficult to get in, as easy as an executive agreement to get out of with a stroke of a pen. But it has one key advantage, which is that it would make the deal binding for the states. Because remember, a lot of states have also divestment and sanctions of their own, and they then comply with the JCPOA. So that's a good thing. It adds a layer. But there is nothing more important for the sustainability of the agreement than U.S. skin in the game. And that is why I think they see opening their market to American companies as the best way of sustaining a deal.

[00:44:36] Speaker 2: If I might add on that issue of the treaty status, we did not promise to try to make it a treaty, but we did voice back in 2017, 2018, the willingness to consider that. We didn't get to the point of having that discussion with the Iranians, unfortunately. But in thinking about a subsequent deal back then, it was at least part of the discussion space that we thought that if anyone is going to be able to get through, and this is something that President Obama could not have done, and he knew he could not have done it, and that's why he did the things in the way that he did with not even an executive agreement, frankly. I'm not even sure, legally speaking, what the JCPOA was. But it certainly wasn't a treaty, at the very least. But I think if anyone could have gotten a treaty, taken this very contentious Iranian issue to the Senate, it was probably Donald Trump. And that may still be true. If he came with some kind of a deal and proposed Senate advice and consent to it, this is sort of a Nixon and China kind of thing, right? Only the arch-anti-communist Richard Nixon could have opened to Mao Zedong. Perhaps only Donald Trump has a chance, or someone like Donald Trump has a chance of getting a JCPOA successor deal through the Senate, which is not a guarantee, of course. But there was some discussion of that possibility last time, and that perhaps might scratch the Iranian itch imperfectly, to be sure, because there's no guarantee, as you point out, Eli.

[00:45:52] Speaker 4: But that could be a piece of this discussion. They also have some bad ideas, including keeping the stockpile of enriched uranium in the country as a nuclear guarantee that the U.S. would not withdraw from the deal, because then they can quickly, basically, get back to where they were. But I'm...

[00:46:09] Speaker 1: Can you see the U.S. ever agreeing to that?

[00:46:10] Speaker 4: I have a hard time imagining that.

[00:46:13] Speaker 1: And is Russia, for the second time, an appropriate repository for the stockpile?

[00:46:21] Speaker 4: I don't think there are a lot of other candidates, although we actually need 20% enriched uranium for small modular reactors. So, you know, some of it could come here.

[00:46:29] Speaker 1: We don't need 60%.

[00:46:32] Speaker 4: Well, 60%, anyways, I don't think they can ship it out, because it's considered weapons-grade, so they probably have to dilute it to 20%, anyways, or lower.

[00:46:40] Speaker 1: Richard, Maria Dooling is asking, can you speak about the regional risks of proliferation, should this deal fail or not overcome the initial hurdles, as defined earlier, both in terms of traditional non-proliferation concerns and in terms of the role of the U.S. in future negotiations with any nation?

[00:46:57] Speaker 3: Yeah, you know, right after the JCPOA was done, Bao Einhorn and I did a study in which we looked at regional proliferation, and we talked with folks in Turkey and Egypt, Saudi Arabia, UAE, Jordan. We went around the region, and the basic conclusion we had at the time was if the JCPOA is fully implemented and if the U.S. is prepared to prevent breakout and is going to build on the JCPOA with something else, that basically that would be sufficient for people not to pursue their own options. And that came down to, despite the fact that a lot of people were grumpy about the JCPOA, they saw considerable costs, both financial and security, from pursuing their own independent nuclear capabilities. But that was in a world in which they had an expectation of U.S. alliance status and partner status mattering, and in which the U.S. was going to come to the aid of Saudi Arabia or UAE otherwise if they were attacked by a foreign adversary. And I gotta be honest, if I am a Emirati or Saudi or Jordanian or Egyptian security advisor at this point, how can I possibly make that kind of assurance to my head of state and say the U.S. is gonna be here? And so to me, I think it is not just as simple as the JCPOA either lived or died or a new deal lives or dies as to whether or not people pursue their options. They're gonna look at the totality of their security circumstances. And I think right now, there is ample reason for a lot of U.S. partners to believe that we will abandon them unless they pay us a bribe and that we will make very contingent land or oil or critical minerals or similar to any kind of support we would give them. If I'm one of those countries, I have to be reconsidering my options notwithstanding what's going on in the JCPOA.

[00:48:40] Speaker 1: Well, Chris, Kelsey Davenport is asking, how does the shifting nuclear environment in the Gulf, particularly the Saudi interest in enrichment, provide an opportunity or a challenge for the Iran talks?

[00:48:52] Speaker 2: Well, to some degree, it builds on what Richard was just saying. I think, I mean, and it creates especially great hurdles for the deal because if you're talking about some kind of a deal that could help assuage or to at least lessen those proliferation incentives, Turkey, Egypt, Saudi, whatever it may be, if you wanted to lessen those incentives in a context in which, I mean, you were sort of diplomatic actually about, if you were the advisor to an Emirati leader, you would be warning them that there's no guarantee that the U.S. would not be approaching alliances on a sort of fee-for-service basis. The reason they think that is because we tell people that. This isn't a hypothetical or an inference, right? In that context, if you want to alleviate the proliferation pressures from Iran's continued possession of

some kind of a nuclear program, you have to be talking about very significant rollback, which makes the negotiating strategy all the harder. And indeed, ideally, you need to be talking about rolling back to something that looks like, at the very least, the first few years of the JCPOA, if not zero, which is perhaps completely unviable from an Iranian perspective. So in a sense, we have made the negotiating challenge for ourself vastly more problematic than it probably should have been, frankly.

[00:50:02] Speaker 3: I've had people ask me before how I got a diplomatic passport, so I've been working on that.

[00:50:08] Speaker 4: If I may also on this. They want to take mine away usually. I think in the de-escalation, the taunts between Iran and GCC countries, there is also a promise that would address one of Chris's concerns about the durability of limitations on Iran's nuclear program. One of the reasons in the JCPOA that Iran didn't agree to permanent restrictions was that then in the NPT, you would have basically nuclear weapon states, non-nuclear weapon states, and Iran in a category of its own, right? But if you now, instead of negotiating a separate nuclear deal with Saudi Arabia that would give the Saudis nuclear fuel cycle, which might result in the Emiratis also want to renegotiate their one-two-three agreement with the US, and then also negotiating a deal with the Iranians, why not put everybody in the same basket and negotiate a sub-regional deal in which everybody would agree never to enrich above 5%, never to reprocess plutonium, everybody ratifies the additional protocol, and all of these things would be forever, right? And the president can say, I got something Obama didn't, which is a set of permanent restrictions. But the only way to do it is to make it multilateral rather than just on Iran.

[00:51:20] Speaker 1: Chris, Edward Levine is asking, if an interim nuclear agreement were negotiated that would include but not destruction of capabilities, it would include, excuse me, export or down blending of HEU and numerical limits on enrichment but not destruction of capabilities, and if President Trump were willing to sign it, would your friends, colleagues on the Republican side oppose it and attack the administration, or would they say, ratify it first and do better in the next negotiation?

[00:51:49] Speaker 2: I wish I knew the answer to that question. Goodness, Ed, you've asked a challenging one. I don't know. I mean, the immediate breakout challenge has to do with material on hand, right? So if you're simply, if you're looking at the first and foremost metric of how do you stretch the breakout period from nanoseconds back into months or perhaps even longer than that, that's the way you make the most headway the most quickly. That doesn't handle the problem of rapidity of being able to, if you have the kind of enrichment capacity that Iran has, you can have a fairly small amount on hand and enrichment levels are going to matter too, but your ability to bump it up to something that's much more weapons usable rather rapidly is going to be pretty big, right? So if you really aren't willing to talk about reducing enrichment capacity, you've got to talk about an exceedingly small on-hand stockpile, which, I mean, maybe, I don't know. Good question.

[00:52:43] Speaker 1: Richard, Daryl Kimball is asking, the IAEA's Grocey, Grocey, the Director General, has noted that any deal on Iran's nuclear program without the IAEA is just a piece of paper. What should or must the role of that agency and

inspections be to prevent breakout in any new deal or is there some other mode of verification, I guess I would add?

[00:53:06] Speaker 3: The IAEA is the game. I mean, look, I mean, you could try and create some other, you know, non-IAEA function for verification. I don't know why you'd bother. You'd be replicating a lot of expertise. You'd be, you know, substituting people who know what they're doing with people who know what they're doing but haven't been there in a while. That doesn't make a lot of sense to me. So no, I think it has to be the IAEA and the IAEA has to be, you know, heavily involved in the verification mission because they're the people who know how to do it best. I mean, I think to the question about what do you do, look, to my mind, the IAEA access piece was one of the strongest and most important parts of the JCPOA. I personally would have traded longer, more intrusive inspection access against even a shorter breakout time. And I've written about this, you know, subsequently. I think we could have lived with a six-month breakout, not a year, if we had gotten even longer, more intrusive IAEA inspections. And to my mind, the advances the Iranians have made on their centrifuges and potentially on weaponization only demands even more access, both to existing sites as well as the ability to find out where Iran's stockpile of centrifuges they've been producing since 2021, though they've not been telling people where they are, and to be able to do weaponization-related access, you know, to get what we didn't get in the JCPOA, which is access to some of the equipment that could be useful in production of a nuclear device. So to me, if I were advising the tech team that's supposed to meet in, you know, in two days' time, I would be saying, get as much, as deep, and as far inspection access as you possibly can. And you can worry about, you know, some of the fine points on how far to push them back on a breakout, you know, after that fact.

[00:54:44] Speaker 2: And that's a crucial piece on the weaponization access too. That was an effort that the JCPOA tried to sort of tip its hat to, but didn't really manage to pull off. The idea of giving the— I mean, the IAEA traditionally does not do weaponization, you know, verification, right? You have to do that sort of thing very carefully in their shoes, lest you run afoul of bigger-picture NPT problems. But it's not impossible to do it. And they did sort of at least think about trying to do that, and it didn't work. But being able to check that box properly in a deal going forward really would be a substantive advance that no one has previously been able to pull off with the Iranians, and that would be a big thing.

[00:55:19] Speaker 3: And we did sort that in Libya. I mean, again, going back to the Libya option, I mean, we had a way in which working with IAEA inspectors who were coming from weapons states and working with the U.S.

[00:55:28] Speaker 2: We had an American and a Frenchman from the IAEA, both of whom still had their weapons clearances from their home governments, but who were, in fact, employees of the IAEA, who went with us to visit— it was actually this fellow named Matouk Matouk, who was the guy to whom Qaddafi had entrusted his embryonic nuclear program. And we had this sort of theatrical arrangement whereby the Libyans didn't want to turn over their weapons designs, literally weapons designs from AQ Khan in the shopping bag from Karachi. They didn't want to turn those over to the Americans and the Brits. That was kind of like, oh, can't do that. That's too politically challenging. So they handed them to the IAEA, who boxed them up, put them in a little container, put an IAEA seal on the container, handed them to us. We

put them in a larger container, put a DITRA seal on the larger container, and flew back to Washington, D.C. That's fine. Let's do it.

[00:56:18] Speaker 1: Well, in fact, I want to note that in the draft budget, State Department budget that we had and I think the Washington Post had as well a week or so ago, there was an 89% proposed cut in UN funding, but not on the IAEA. So it seems to me that this administration may realize that that expertise is one of the things that they value.

[00:56:45] Speaker 2: And if we cut our voluntary contribution to the IAEA, you can kiss the Safeguards Department goodbye. No more such thing. Can't happen.

[00:56:53] Speaker 1: Taylor Loy is asking, the U.S. is in the process of losing an entire generation of experts who could meet these complex and technical diplomatic challenges in the future. How should we recover and rebuild that human capital? We can't outsource geopolitics to the private sector. Ali, jump in here.

[00:57:13] Speaker 4: Well, I mean, these gentlemen have served in the administration, so I think they're a better place to respond.

[00:57:19] Speaker 3: I'm not sure I can stop crying before I do it. Look, I mean, the answer to the question is yes. I mean, we are at the risk of losing a generation of expertise. We're at risk of losing, you know, people who need to be able to learn from, you know, seniors who've been doing these things to pass that information, those lessons down. They need to be working with the laboratories. They need to be getting that sort of knowledge. And it's beyond tragedy. It's an absolutely devastating national security blow that is coming with the evisceration of these folks. But I will say this is where functions like the folks who are gathered here can at least play some role in terms of keeping the lights on and keeping some of the expertise down. I think we actually need to do a little bit of thinking about people who are being riffed and people who are being kicked out of the labs and similar to see if we can keep some amount of work going so that they're in a position to go back if at some point the politics turn and we can return to that. But the damage could be permanent. We just need to acknowledge that. And hopefully folks in Congress will, in my opinion, stand up and say, this is ridiculous. Let's not do this. Not only in this space, but other spaces too.

[00:58:27] Speaker 2: These are not purely, I mean, these are very technical roles in many cases that require actual technical expertise. But it's not just that. I mean, to some degree, these are apprenticeship type learning curves, right? So you don't just, you know, study this in a textbook and come out as someone who can, in fact, go and apply these principles in situ in a real world problem, you know, assessing whatever it is. Are you saying this is an art,

[00:58:50] Speaker 1: not a science?

[00:58:52] Speaker 2: It's both. You need to learn from people who have done it before. And if they ain't there, you can't learn from them. That's just hard to escape.

[00:59:00] Speaker 1: Ali, if you want to bring us home here in terms of your bottom line on what Iran is willing to concede in a perfect world in these negotiations,

assuming that 60 days is an unrealistic expectation and we'll get some more time to do this.

[00:59:25] Speaker 4: So first, I think, you know, in President Trump, there is really a historic opportunity for getting a deal that is different than the JCPOA. I mean, a huge part of the debate in this town, again, is about whether this is Obama 2.0 or Bolton 3.0 or whatever way you want to formulate it. The reality is that this is going to be a different deal because it's a different program. We're dealing with a different reality. And yet, because of who President Trump is, because of the previous experience he has had with the Iranians, because the Iranians have tried the alternative, because we have tried the alternative, right? There's nothing that is hypothetical anymore. Everybody has tried maximum pressure, diplomacy. We all know which one works, which one doesn't. I think there is a real chance of getting things done that were hard to imagine previously. One of them, Andrea, is this idea that has bubbled up already from my understanding in the negotiations, which is the possibility of a joint venture with the United States. I mean, this is, Kissinger brought this up first in the 1970s and we're back full circle to that again of basically having the U.S. involved in the nuclear program as a best way of adding a layer of assurance that this program will remain civilian in nature.

[01:00:49] Speaker 1: Well, I just want to thank all of you and, of course, the Carnegie Endowment for International Peace, which is just such a vital organization. The incredibly thoughtful questions from our audience to thank all of you. And also, as a point of personal privilege, if you draw anything from today's conversation and the level of thought that has gone into their knowledge base, you have to believe that there is value in our current service officers, in our experts, and in keeping the intellectual, you know, potential going from one administration to another, because the cross-fertilization here is a perfect example of why diversity of opinion and experience leads to better suggestions and potentially better outcomes. So thank you all so very much. I appreciate it.

[01:01:51] Speaker 3: Ladies and gentlemen.