

Iran's Nuclear Program: Collapse of JCPOA and Nuclear Non-Proliferation Efforts

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Abstract

The crisis surrounding Iran's nuclear program has increasingly shifted from diplomatic management towards military confrontation, raising critical questions about the durability of negotiated nuclear restraint arrangements. The Joint Comprehensive Plan of Action (JCPOA) represented one of the most comprehensive diplomatic efforts to address concerns regarding Iran's nuclear activities through limits on its enrichment activities and reciprocal sanctions relief. However, the unilateral withdrawal of the United States (US) from the agreement in 2018, followed by the reimposition of extensive economic sanctions, fundamentally complicated the Iranian nuclear dispute. This decision undermined the credibility of multilateral diplomacy, eroded confidence in negotiated commitments, and generated a deep trust deficit between Iran and Western powers. Against this backdrop, tensions surrounding Iran's nuclear program have increasingly been managed through coercive pressure and the use of force, as evidenced by the twelve-day US-Israel war on Iran in June 2025, as well as the recent war of 2026. The collapse of the JCPOA framework has, therefore, transformed a previously negotiated nuclear issue into a broader strategic crisis with significant implications for regional security and global nuclear non-proliferation efforts. This article argues that the erosion of diplomatic mechanisms designed to manage Iran's nuclear program risks reinforcing perceptions within Iran that nuclear restraint does not guarantee security or protection from external pressure. Under conditions of sustained confrontation and strategic uncertainty, debates within Iran

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regarding the costs and benefits of continued adherence to the Nuclear Non-proliferation Treaty (NPT) may intensify. The article examines whether the breakdown of the JCPOA and the military strikes against Iranian nuclear facilities could ultimately incentivize Tehran to reconsider its nuclear posture and develop deterrence capabilities as a means of ensuring regime survival. This could lead to a domino effect of nuclear proliferation in the region and across the globe, further undermining the NPT. The study highlights how the failure of diplomacy in favor of the use of military force can reshape proliferation incentives and complicate efforts to manage nuclear risks in an increasingly fragmented global nuclear order.

Keywords: Iran, United States, Israel, Nuclear Non-proliferation, JCPOA, NPT.

Introduction

The nuclear crisis with Iran has moved from diplomacy to war, and now there are serious concerns about the sustainability of negotiated nuclear restraints. The US-Israel attacks on Iran in June 2025¹ and February 2026² have once again put the international rules-based system to the test. The world is entering a new phase of strategic uncertainty,³ with a dramatic restructuring of the nuclear order away from traditional multilateral treaty-based frameworks and towards a highly fractious, volatile world. The backbone of the nuclear non-proliferation regime has been the NPT's foundational grand bargain, in which non-nuclear-weapon states (NNWS) agreed to forgo developing nuclear weapons, using peaceful civilian nuclear

¹ Reuters, "The Road to the Israel-Iran War," July 23, 2025, <https://www.brookings.edu/articles/the-road-to-the-israel-iran-war/>

² Reuters, "Israel Says It Launched Pre-emptive Attack against Iran," February 28, 2026, <https://www.reuters.com/world/middle-east/israel-says-it-launched-pre-emptive-attack-against-iran-2026-02-28/>

³ Miller, Steven E. "A Nuclear World Transformed: The Rise of Multilateral Disorder." *Daedalus* 149, no. 2 (2020): 17–36; Götz Neuneck, "The Deep Crisis of Nuclear Arms Control and Disarmament: The State of Play and the Challenges," *Journal for Peace and Nuclear Disarmament* 2, no. 2 (2019): 431–52, <https://doi.org/10.1080/25751654.2019.1701796>; and Ghazala Yamin Jalil, "The New Nuclear Arms Race: Implications for Global Security," in *Dynamics of the Changing Global Security Order*, ed. Senthana Selvarajah, Nesrin Kenar, and Lorenzo Fiorito (Lanham, MD: Lexington Books, 2023)

technology, and to ensure that the nuclear-weapon states (NWS) would work towards comprehensive disarmament in good faith.⁴

The erosion of that norm, however, signals a growing loss of credibility at international governance, and a growing reliance on geopolitical unilateralism, coercive diplomacy, and a more explicit use of kinetic counter-proliferation options. This crisis of authority is most pronounced in the current lifecycle and eventual failure of the JCPOA, which has turned an extremely technical non-proliferation issue into a regional and global strategic crisis.

The JCPOA was negotiated in 2015 by Iran and the P5+1 powers⁵ and was touted to be a success of multilateral diplomacy and a model for the NPT-based regime. It gave Iran sanctions relief in return for restricting its enrichment capabilities for 10-15 years. Importantly, the accord was supported by Iran's adherence to the intrusive Additional Protocol of the International Atomic Energy Agency (IAEA), which had been voluntarily agreed by Iran, and this represented unprecedented institutional transparency and verification safeguards.⁶

The breakdown of this system was not due to any lack of technical compliance by Tehran but rather it was a fundamental structural weakness within the international system. This underscores the potential fragility of negotiated legal and diplomatic agreements in the face of unexpected policy changes in key powers' domestic politics. The unilateral withdrawal of the Trump administration from the JCPOA in May 2018 and the implementation of the impartial 'maximum pressure' policy, which involved sweeping economic sanctions including secondary sanctions on third-party entities, oil export restrictions, and the freezing of Iranian assets, dealt a blow to the agreement's reciprocity mechanism.⁷ The international

⁴ Treaty on the Non-Proliferation of Nuclear Weapons, opened for signature July 1, 1968, 729 U.N.T.S. 161, entered into force March 5, 1970, art. VI, <https://www.un.org/en/conf/npt/2015/pdf/text%20of%20the%20treaty.pdf>

⁵ Joint Comprehensive Plan of Action, Vienna, July 14, 2015, https://www.eeas.europa.eu/sites/default/files/eu_iran_joint-comprehensive-plan-of-action_en.pdf

⁶ Kesley Davenport, "The Joint Comprehensive Plan of Action (JCPOA) at a Glance," Fact Sheet, February 2025, <https://www.armscontrol.org/factsheets/joint-comprehensive-plan-action-jcpoa-glance>

⁷ Stephen P. Mulligan, "Withdrawal from the Iran Nuclear Deal: Legal Authorities and Implications," Congressional Research Service Legal Sidebar LSB10134, May 17, 2018, <https://www.congress.gov/crs-product/LSB10134>

community failed to give Iran the sanctions relief and economic integration that it has sought in return for its nuclear restraint, thereby creating an alarming lack of trust and showing states that continuing compliance does not ensure protection from outside economic warfare or regime change logics.

With the breakdown of subsequent diplomatic efforts to rejuvenate the accord under the Biden and Trump administrations and the June 2025 military strikes, the crisis has entered a dangerous new phase of militarization. In early 2026, after a series of massive US and Israeli strikes on civilian, military and nuclear facilities, the old rules of nuclear diplomacy were over. Now, it is no longer a matter of institutional negotiations on measures of verification; it is about kinetic brinkmanship and conflict.

Once it was stripped of the legal and procedural limitations imposed by the JCPOA, Tehran systematically curtailed its cooperation with the IAEA, thus establishing a very deep 'continuity of knowledge' verification vacuum. This deep transition from a legally constrained to an active security dilemma has ramifications for the stability of the region and international non-proliferation standards. The failure of diplomatic mechanisms within Iran has altered the internal balance of power, marginalizing voices of internationally oriented moderate factions and empowering hardline elements. Consequently, senior Iranian state advisors have openly questioned the status of the Supreme Leader's 2010 nuclear fatwa and publicly warned that any existential threat to the state's survival will leave Tehran with no choice but to adjust its military doctrine toward explicit nuclear weaponization.⁸

Ultimately, if Iran concludes that its regime survival necessitates crossing the weaponization threshold, the resulting structural shock will likely trigger an immediate proliferation cascade across the Middle East.⁹ Faced with an ambiguous or overt Iranian deterrent, neighboring middle powers like Saudi Arabia, Egypt, Turkiye, the United Arab Emirates (UAE), and Jordan may find it hard to rely on external, conditional security

⁸ Kamal Kharrazi, interview by Al Jazeera Arabic, *Al Jazeera Arabic*, May 8, 2024. Iran warns it will change nuclear doctrine if 'existence threatened' | Nuclear Weapons News | Al Jazeera

⁹ George Perkovich, "How the Iran War undermines the nuclear nonproliferation regime," *Bulletin of Atomic Scientists*, April 2, 2026 <https://thebulletin.org/2026/04/how-the-iran-war-undermines-the-nuclear-nonproliferation-regime/>

guarantees.¹⁰ This potential domino effect threatens to normalize regional hedging, trigger an uncontrolled horizontal proliferation, and permanently undermine the normative legitimacy of the NPT framework.

This research paper examines how the collapse of the JCPOA and the subsequent militarization of the Iranian nuclear dispute have fundamentally altered the strategic calculations surrounding state sovereignty, treaty compliance, and regime survival in an increasingly fragmented global nuclear order. The paper addresses the following underlying questions: What does the collapse of JCPOA mean for the nuclear non-proliferation regime? What are the implications of the use of military coercion for Iran's nuclear program and internal debates in Iran? What are the prospects of Iran withdrawing from the NPT? How will it impact non-proliferation in the region or globally? The paper posits that the collapse of the JCPOA, coupled with military strikes on Iranian soil, fundamentally undermines the NPT regime by implying diplomatic compliance does not guarantee security. It would, thereby, incentivize nuclear hedging or breakout as the ultimate deterrent against coercion.

Conceptual Argument

The paper uses Structural Realism to explain why Iran's behavior may be a rational response to an anarchic international system where no higher authority can protect a state from coercion and military aggression. It also argues that in an anarchic world, where the promise of a non-proliferation regime as guarantor to security remains unrealized, states may be forced to rely on the principle of self-help, to think about developing conventional or nuclear deterrents of their own.¹¹ Consequently, the structural constraints of anarchy trigger a classic security dilemma where actions taken by a state to safeguard its survival are invariably perceived as threats by its adversaries, intensifying systemic friction. In order to safeguard against coercion, encirclement, or preemptive military strikes, states are compelled to maximize their military capabilities, relying ultimately on hard power as the

¹⁰ Colin Kahl, Matthew Irvine and Melissa Dalton, "Atomic Kingdom: If Iran Builds the Bomb, Will Saudi Arabia Be Next?" Center for a New American Security. February 13, 2019, <https://www.cnas.org/publications/reports/atomic-kingdom-if-iran-builds-the-bomb-will-saudi-arabia-be-next>

¹¹ Kenneth Waltz, *Theory of International Politics* (Reading, MA: Addison-Wesley, 1979) pp. 88-93 and John Mearsheimer, *The Tragedy of Great Power Politics* (New York: W.W. Norton & Company, 2001) pp. 30-33

sole reliable guarantor of security. Essentially, the principle of self-help would prevail in the contemporary world, where the fracturing of rules-based international system means that hard power remains the ultimate guarantor of sovereignty. In such an anarchic world, nuclear hedging or breakout may be the ultimate deterrent against coercion.¹² Nuclear hedging allows a state to develop the latent technical capacity to construct a nuclear weapon rapidly, serving as a powerful diplomatic lever and a passive deterrent against coercion. Should the threat of military intervention cross a critical threshold, the state may execute a nuclear breakout as the final recourse to ensure survival in a self-help world.

Much has been written on Iran's nuclear program, including the early engagement of international players like the US, Russia, China, the United Kingdom (UK), their respective political and economic agendas, and their own interests¹³ and the arduous diplomatic journey culminating in the JCPOA. The current scholarship on the Iranian nuclear program broadly falls into three categories.

The first stream analyzes the JCPOA as a landmark framework for non-proliferation. Scholars in this camp emphasize how the agreement's stringent monitoring provisions strengthened global non-proliferation norms, even though the mechanism was ultimately undermined by political fragility.¹⁴ Many see the JCPOA as the most viable diplomatic template for constraining Iran's nuclear program despite its current collapse. For instance, Khan argues the collapse of JCPOA would erode the global nonproliferation framework by demonstrating the futility of diplomatic engagement over nuclear programs.¹⁵ Others examine the possibility of

¹² Ariel E. Levite, "Never Say Never Again: Nuclear Reversal and Hedging against Nuclearization," *International Security* 27, no. 3 (Winter 2002–3): 59–88, <https://doi.org/10.1162/016228803321951108>; Wyn Bowen and Matthew Moran, "Iran's Nuclear Programme: A Case Study in Hedging?," *Contemporary Security Policy* 35, no. 1 (2014): 26–52, <https://doi.org/10.1080/13523260.2014.884338>

¹³ Ghazala Yasmin, "Iran-IAEA Standoff: The WMD Issue," *Strategic Studies* 25, no. 3 (Autumn 2005): 83–103

¹⁴ "What Is the Iran Nuclear Deal?" *Council on Foreign Relations*, October 27, 2023, <https://www.cfr.org/backgrounders/what-iran-nuclear-deal>

¹⁵ Saira Khan, "Conclusion," in *The Iran Nuclear Deal*, Studies in Iranian Politics (Cham: Palgrave Macmillan, 2024)

Iran's withdrawal from the NPT and its legal aspects.¹⁶ Legal and policy analysts highlight that Iran's voluntary implementation of the IAEA's Additional Protocol temporarily reduced regional proliferation risks.

The second stream of scholarship focused on the decline of JCPOA, the qualitative and quantitative growth of Iran's nuclear program, and its 'breakout time.' Perkovich raises the critical concern that when treaty compliance fails to guarantee a state's security, sovereign actors may be incentivized to pursue independent nuclear deterrents.¹⁷ Other scholars warn that normalized, prolonged Iranian nuclear hedging erodes the normative authority of global regimes, forcing neighboring states to actively reconsider their independent nuclear postures.¹⁸

The structural stream contextualizes the Iran nuclear crisis within a broader macro-level analysis, examining it through the lens of structural realism, shifting global hegemony, and economic coercion. Kenneth Waltz provocatively argued from a structural realist perspective that an Iranian nuclear deterrent would create a stable, regional balance of power.¹⁹ Scholars such as Valadbaygi argue that the JCPOA negotiations and subsequent collapse are tied directly to global capital restructuring and intense domestic factional dynamics. The initial diplomatic breakthrough in 2015 is framed as a product of the post-2008 US strategic pivot to Asia,²⁰ while the 2018 US withdrawal reflects the reassertion of neoconservative and Israel-aligned factions within the Trump administration over deal-

¹⁶ Christopher P. Evans, "Going, Going, Gone? Assessing Iran's Possible Grounds for Withdrawal from the NPT," *Journal of Conflict and Security Law* 26, no. 2 (Summer 2021): 309–345, <https://doi.org/10.1093/jcsl/krab001>

¹⁷ George Perkovich, "How the Iran War Undermines the Nuclear Nonproliferation Regime," *Bulletin of the Atomic Scientists*, April 2, 2026, <https://thebulletin.org/2026/04/how-the-iran-war-undermines-the-nuclear-nonproliferation-regime/>

¹⁸ Joseph Rogers, "Iran and the Changing Character of the Nonproliferation Regime," *CSIS*, June 20, 2025, <https://www.csis.org/analysis/iran-and-changing-character-nonproliferation-regime> ; and Thanos Dokos, "Iran's Nuclear Propensity: The Probability of Nuclear Use," *Non-Proliferation Papers*, No. 38, March 2014, p. 3, https://www.sipri.org/sites/default/files/EUNPC_no-38.pdf

¹⁹ Kenneth Waltz, "Why Iran should get the bomb," *Foreign Affairs*, vol. 91, no. 4, 2012, pp. 2–4 (font?)

²⁰ Hillary Rodham Clinton, "America's Pacific Century," *Foreign Policy*, October 11, 2011, <https://foreignpolicy.com/2011/10/11/americas-pacific-century/>

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supporting capital/material economic interests.²¹ This scholarship views the crisis as a symptom of a broader erosion of multilateralism and major power rivalry.

This article looks at how the micro-level collapse of the JCPOA serves as the empirical tipping point for a macro-level international level systemic shift. This study utilizes structural realism theory to argue that the demise of the non-proliferation regime would trigger a systemic domino effect, signaling a brutal return to a classic, anarchic 'self-help' world.

Iran's Nuclear Program

Iran signed the NPT in 1968 as a non-nuclear-weapon state and pledged not to develop nuclear weapons. However, the matter of Iran's nuclear enrichment activities came to the fore in 2002. It was revealed that Iran had secretly been pursuing uranium enrichment technology without IAEA knowledge.²² Iran always maintained that the pursuit of an entire nuclear fuel cycle was solely for peaceful purposes.²³ Tehran defended its enrichment program by emphasizing its 'inalienable right' to peaceful technology under Article IV of the NPT, backed by a religious fatwa declaring nuclear weapons unlawful.²⁴ While the US has accused Iran of pursuing a nuclear weapons program under the pretext of nuclear energy.²⁵ The issue of contention is the dual nature of nuclear technology. Uranium can be enriched to produce fuel for nuclear power reactors, but can also be enriched further (90% or above) to produce weapons-grade uranium. Due to this proliferation risk, the IAEA monitors any enrichment facilities by NPT member states. Iran claimed that it had no aspirations to develop nuclear weapons, but at the same time, it is not ready to give up its right to

²¹ Kayhan Valadbaygi, "Unpacking the 2015 Iran Nuclear Deal (JCPOA): Internationalisation of Capital, Imperial Rivalry and Cooperation, and Regional Power Agency," *Politics* 45, no. 2 (May 2025): 202–222, first published online May 10, 2023, <https://doi.org/10.1177/02633957231173135>

²² Nima Gerami and Pierre Goldschmidt, *The International Atomic Energy Agency's Decision to Find Iran in Non-Compliance, 2002–2006*, Case Study Series, no. 6 (Washington, DC: National Defense University Press, 2012), 1–3

²³ Sharon Squassoni, "Iran's Nuclear Program: Recent Developments," Congressional Research Service, updated August 3, 2006, https://www.everycrsreport.com/files/20060803_RS21592_23194b5d4d31ecbd575cc9f8d867a91be41b60cb.pdf

²⁴ F. S. Sirjani, "Iran's Nuclear Fatwa," *International Relations and Diplomacy* 4, no. 2 (2016)

²⁵ Sharon A. Squassoni, *Iran's Nuclear Program: Recent Developments*, CRS Report for Congress RS21592 (Washington, DC: Congressional Research Service, August 3, 2006)

pursue peaceful nuclear technology.²⁶ Many wanted Iran to give up its nuclear enrichment capabilities – including the IAEA, the European Union (EU), and the US. Long negotiations eventually culminated into an agreement called the JCPOA in 2015, endorsed by the United Nations Security Council (UNSC) through its Resolution 2231.²⁷ The post-US withdrawal from the JCPOA in 2018, Iran shifted its narrative, invoking Paragraph 36 of the JCPOA²⁸ to justify its incremental enrichment escalation (currently up to 60%) as a legitimate reciprocal response to US sanctions.

The Rise and Fall of the JCPOA

The JCPOA, also referred to as the Iran nuclear deal, was negotiated in 2015 between Iran and the P5+1 or the US, UK, France, China, Russia, and Germany. It was designed to limit element of Iran's nuclear program in exchange for lifting international sanctions. It was considered a major non-proliferation achievement.

Some of the JCPOA key elements helped restrict Iran's nuclear enrichment activities as well as afforded IAEA inspections under the Additional Protocol (AP). It included capping uranium enrichment at 3.67% and limited the stockpile of enriched uranium to 300 kg for 15 years.²⁹ It reduced the operational centrifuge limits to totals 6,104 IR-1s machines for 10 years. In addition, enrichment was restricted to the Natanz facility only, and Plutonium reprocessing was stopped.³⁰

The JCPOA also provided unprecedented IAEA transparency as Iran agreed to implement the IAEA's AP without ratifying it, thus allowing inspectors quick access to both declared and undeclared sites as well as long-term surveillance. The JCPOA stipulated a 20-year surveillance of centrifuge

²⁶ *Agreed Statement at the End of a Visit to the Islamic Republic of Iran by the Foreign Ministers of Britain, France and Germany (Tehran Declaration)*, Tehran, October 21, 2003, Acronym Institute for Disarmament Diplomacy

²⁷ United Nations Security Council, *Resolution 2231 (2015) [on the Joint Comprehensive Plan of Action (JCPOA) on the Islamic Republic of Iran's Nuclear Programme]*, S/RES/2231 (July 20, 2015), https://www.iaea.org/sites/default/files/unsc_resolution2231-2015.pdf

²⁸ *Joint Comprehensive Plan of Action*, Vienna, July 14, 2015, <https://2009-2017.state.gov/documents/organization/245317.pdf>

²⁹ 'Joint Comprehensive Plan of Action,' July 14, 2015, https://www.ceas.europa.eu/ceas/joint-comprehensive-plan-action_en

³⁰ Ibid

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production facilities and a 25-year surveillance of uranium mines. In return, Iran was given sanctions relief. Sanctions targeting Iran's oil, banking, and shipping sectors by the UN, EU, and US were lifted on the Implementation Day.³¹

Ultimately, the JCPOA not only provided unprecedented transparency and quick access to the IAEA on Iran's nuclear program and facilities, allowing confidence that it was not producing nuclear weapons, but also limited uranium enrichment and forbade the extraction of plutonium through reprocessing at Arak nuclear reactor that had the potential to produce one or two nuclear weapons a year from the plutonium from its spent fuel.³² Thus, JCPOA was a non-proliferation win.

The success of JCPOA in curtailing Iran's nuclear program was dealt a major blow when the US under President Donald Trump, who unilaterally withdrew from the agreement in May 2018. Trump administration argued that the sunset clauses in the JCPOA was a temporary fix rather than a permanent solution, and key restrictions on Iran's uranium enrichment and centrifuge levels were set to expire in 10–15 years. Subsequently, Iran would be free to pursue its nuclear program.³³ The US also reimposed economic sanctions on Iran. On the other hand, Iran has accused the US of reneging on its commitments and blamed Europe for submitting to US unilateralism.

Remaining parties to the Iran nuclear deal - China, France, Germany, Russia, and the UK tried their best to save the JCPOA; however, it was not possible due to US unilateral sanctions that discouraged European firms from doing business with Iran. In response, Iran accelerated its uranium enrichment activities and progressively started abandoning its commitments under JCPOA, from 2019 onwards. In February 2021, in response to the assassination of the Iranian nuclear scientist Mohsen Fakhrazadeh by Israeli

³¹ Ibid

³² Gary Samore, ed., *The Iran Nuclear Deal: A Definitive Guide* (Cambridge, MA: Belfer Center for Science and International Affairs, Harvard Kennedy School, August 3, 2015), <https://www.belfercenter.org/publication/iran-nuclear-deal-definitive-guide>

³³ "Remarks by President Trump on the Joint Comprehensive Plan of Action," May 18, 2015, <https://trumpwhitehouse.archives.gov/briefings-statements/remarks-president-trump-joint-comprehensive-plan-action/>

operatives, Iran suspended the implementation of Additional Protocol.³⁴ Iran's cooperation with the IAEA also started declining in response to US coercive diplomacy.

By May 2025, the IAEA claimed that Iran possessed over 400kg of uranium enriched to 60% purity - a near 50% increase in enriched material in three months.³⁵ Although it was well short of the weapons-grade uranium of 90% enrichment or above, the IAEA Director General, Rafael Grossi, expressed serious concern over the enrichment levels.³⁶ The US and Western sources estimated that Iran, if it chose, could produce weapons-grade material in less than two weeks and manufacture a nuclear bomb within months.³⁷ Iran, on the other hand, consistently claimed that its nuclear program was for peaceful purposes and that it had no plans to build nuclear weapons. Iran's religious and political leader, Ayatollah Ruhollah Khomeini, declared weapons of mass destruction un-Islamic during the Iran-Iraq War. This anti-nuclear stance or 'Fatwa' has been strictly maintained by his successor, Ayatollah Ali Khamenei. On one occasion, Khamenei said, 'I stress that the Islamic Republic has never pursued nuclear weapons. At the same time, it will never give up the right of its people to use nuclear energy for peaceful purposes. Our slogan is, 'Nuclear energy for all, and nuclear weapons for none.'³⁸ Iran has also been a strong proponent of a nuclear weapons-free zone in the Middle East in parallel.

³⁴ Motamed, M. "Iran buries slain nuclear scientist, promises retaliation," *Al Jazeera*, November 30, 2020, <https://www.aljazeera.com/news/2020/11/30/iran-buries-assassinated-scientist-amid-promises-of-retaliation>

³⁵ "Iran significantly growing uranium stockpile, warns UN nuclear agency," *BBC News*, May 31, 2025, <https://www.bbc.com/news/articles/c1mg7kx2d45o>

³⁶ International Atomic Energy Agency, *Verification and Monitoring in the Islamic Republic of Iran in Light of United Nations Security Council Resolution 2231 (2015): Report by the Director General*, GOV/2025/24 (Vienna: International Atomic Energy Agency, May 31, 2025), <https://www.iaea.org/sites/default/files/25/06/gov2025-24.pdf>

³⁷ Paul K. Kerr, *Iran and Nuclear Weapons Production*, CRS In Focus IF12106 (Washington, DC: Congressional Research Service, June 24, 2025), https://www.congress.gov/crs_external_products/IF/PDF/IF12106/IF12106.20.pdf

³⁸ Ali Khamenei, "Religious and Political Aspects of the Ban on Building Nuclear Weapons," March 2, 2021, quoting the Leader's address delivered at the 16th Summit of the Non-Aligned Movement, Tehran, August 30, 2012, <https://english.khamenei.ir/news/8398/Religious-and-political-aspects-of-the-ban-on-building-nuclear>

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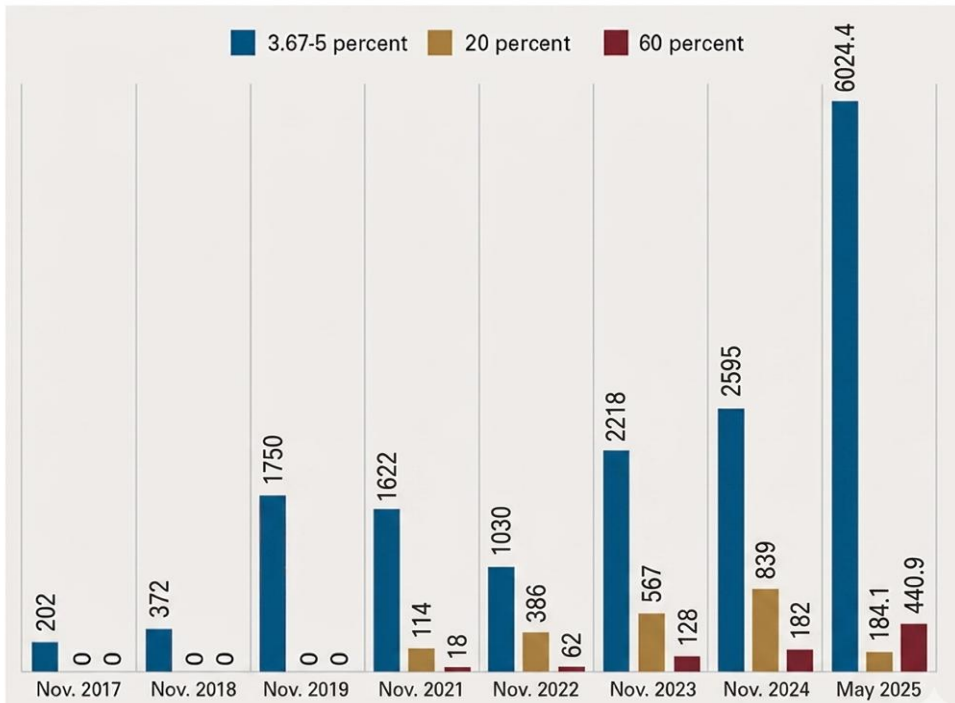
Thus, the US withdrawal was a major blow to the JCPOA. As a result, Iran's nuclear program advanced much more than it did under the JCPOA restrictions. The IR-6 centrifuges that Iran was using are roughly 10 times more efficient than the first-generation IR-1 models permitted under the original deal. While the deal limited Iran's enrichment to 3.67% and stockpile of enriched uranium to 300 kg for 10-15 years, as of June 2025, its total enriched uranium stockpile was 9040.5 kg, of which 6024 kg was enriched up to 5%; 184.1 kg enriched up to 20%; and 440.9 kg of uranium enriched up to 60%.³⁹ Iran also increased the number of centrifuges from 6,104 IR-1s to over 12,000, which included advanced IR-4 and IR-6 centrifuges as well.⁴⁰ Iran also resumed heavy water production at Arak and started enriching uranium at Fordow, abandoning the JCPOA limits in response to US sanctions. In addition, Iran also started limiting the access of IAEA inspectors to its nuclear facilities while withholding the recordings from February 2022 onwards till the US and Israel on Iran's nuclear facilities.⁴¹

³⁹ International Atomic Energy Agency, *Verification and Monitoring in the Islamic Republic of Iran in Light of United Nations Security Council Resolution 2231 (2015): Report by the Director General*, GOV/2025/50 (Vienna: International Atomic Energy Agency, September 3, 2025), <https://www.iaea.org/sites/default/files/documents/gov2025-50.pdf>

⁴⁰ International Atomic Energy Agency, *Verification and Monitoring in the Islamic Republic of Iran in Light of United Nations Security Council Resolution 2231 (2015): Report by the Director General*, GOV/2025/50 (Vienna: International Atomic Energy Agency, September 3, 2025)

⁴¹ "US, Israel Attack Iran Updates: Khamenei, Top Security Officials Killed," *Al Jazeera*, February 28, 2026, <https://www.aljazeera.com/news/liveblog/2026/2/28/live-israel-launches-attacks-on-iran-multiple-explosions-heard-in-tehran>

Iran's Stockpiles of Enriched Uranium (kilograms by weight)



Source: International Atomic Energy Agency⁴²

Thus, the demise of the JCPOA was a non-proliferation loss. It removed several restrictions on Iran's enrichment activities and afforded limited IAEA monitoring. It not only widened the trust deficit between Iran and the US but also served as a blow to the global non-proliferation regime. The JCPOA was replaced initially with coercive diplomacy and subsequently led to military strikes by the US and Israel, thus eliciting more defiant and hardliner responses in Iran.

Military Strikes on Iran: Shrinking Space for Diplomacy

The US withdrawal from JCPOA was accompanied by a decline in diplomacy to restore limits on Iran's nuclear program. There were some

⁴² International Atomic Energy Agency, *Verification and Monitoring in the Islamic Republic of Iran in Light of United Nations Security Council Resolution 2231 (2015)*, GOV/2025/24 (Vienna: International Atomic Energy Agency, May 31, 2025), page number, <https://www.iaea.org/sites/default/files/25/06/gov2025-24.pdf>

efforts by the President Joe Biden Administration to revive the JCPOA with the mediation of European countries, however, the Vienna talks ended unsuccessfully without any agreement.⁴³ Since early 2025, under President Donald Trump's second term, there have been several rounds of diplomatic talks to reach a nuclear deal with Iran; however, due to the rigid position of both states, no agreement could be reached. The hurdles have been over the issues of verification and transparency measures, sanctions lift, the fate of Iran's stockpile of highly enriched uranium, and its future enrichment capabilities.⁴⁴ The US had also reportedly proposed a framework of a regional consortium model where uranium enrichment would take place in Iran's neighboring countries, a proposal that was unacceptable to Iran. However, diplomacy was abruptly abandoned in favor of military coercion following the release of an IAEA report on May 31, 2025. The report alleged that Iran's stockpile of 60% highly enriched uranium had surged by nearly 50% to 408.6 kg and definitively linked past undeclared nuclear activities across multiple sites.⁴⁵ The IAEA report was heavily leveraged as a political pretext by the US and Israel to disrupt the diplomatic track, occurring just two days before a scheduled sixth round of negotiations mediated by Oman. Thus, diplomacy was abandoned in favor of military coercion first when the Israeli military launched a series of air strikes targeting Iran's nuclear facilities and military sites across Iran on June 13, 2025, that killed senior Iranian military officials and nuclear scientists in a large-scale attack.⁴⁶ The IAEA confirmed that the Natanz enrichment site was impacted, but no radiation leaks were detected, while the Esfahan and Fordow sites were not impacted. However, Director General Grossi expressed deep concern, stating: 'Nuclear facilities must never be attacked... Such attacks have serious implications for nuclear safety, security, and safeguards, as well as

⁴³ Maziar Motamedi, "Iran nuclear talks to restart in Vienna with EU mediation," *Al Jazeera*, August 2, 2022, <https://www.aljazeera.com/news/2022/8/3/iran-nuclear-talks-to-restart-in-vienna-with-eu-mediation>

⁴⁴ Matthew Sharp and Nate Swanson, "Can Trump Get a New Nuclear Deal with Iran? Washington Has More Demands—and Tehran Has More Leverage," *Foreign Affairs*, May 12, 2026, <https://www.foreignaffairs.com/united-states/can-trump-get-new-nuclear-deal-iran>

⁴⁵ International Atomic Energy Agency, *Verification and Monitoring in the Islamic Republic of Iran in Light of United Nations Security Council Resolution 2231 (2015): Report by the Director General*, GOV/2025/24 (Vienna: International Atomic Energy Agency, May 31, 2025). [gov2025-24.pdf](https://www.iaea.org/publications/2025/gov2025-24.pdf)

⁴⁶ "Israel Carries Out Strikes Targeting Iran's Nuclear, Military Sites," *Al Jazeera*, June 13, 2025, <https://www.aljazeera.com/news/2025/6/13/sounds-of-explosions-heard-in-irans-capital-tehran>

regional and international peace and security.⁴⁷ Again, on June 22, 2025, the US attacked three nuclear facilities in Iran as part of the Twelve-Day War, code-named Operation Midnight Hammer.⁴⁸

The diplomatic impasse deepened significantly when a joint US-Israeli campaign of massive airstrikes, codenamed Operation Epic Fury and Operation Roaring Lion, was unleashed on February 28, 2026. This military escalation directly followed the Oman-mediated backchannel talks held earlier that month, where Washington and Tehran had attempted to negotiate a new framework. These negotiations collapsed primarily because of unyielding, fundamentally irreconcilable core demands: the Trump administration insisted on a strict 'zero enrichment' policy and the complete dismantlement of Iran's ballistic missile infrastructure, while Tehran refused any deal that did not grant immediate, comprehensive sanctions relief and recognize its sovereign right to domestic enrichment. President Trump has struggled to define the rationale of the conflict, oscillating between regime change, the imminent danger from Iran's nuclear program, and the need to roll it back. The latter rationale is dubious since just months ago, after the June 2025 strikes, he claimed that Iran's nuclear program was 'obliterated'.⁴⁹

The renewed attacks came on the heels of several rounds of talks between Iran and the US that failed to reach a diplomatic solution to the issue of Iran's nuclear program. The last round was held on February 25 and mediated by Oman just two days before the attacks. Under the Operation Epic Fury, which consisted of nearly 900 strikes within just the first 12 hours. Strikes on military infrastructure, air defenses, and Iranian leadership were conducted, resulting in the deaths of several high-ranking officials, including Supreme Leader Ali Khamenei. Iran launched counter-strikes against US bases in the region, Israel, and also closed the Straits of Hormuz,

⁴⁷ International Atomic Energy Agency, "Statement on the Situation in Iran," June 13, 2025, <https://www.iaea.org/newscenter/statements/statement-on-the-situation-in-iran-13-june-2025>

⁴⁸ Andrew Roth, "Donald Trump Says US Has Attacked Three Iranian Nuclear Sites and 'Totally Obliterated' Them," *The Guardian*, June 22, 2025, <https://www.theguardian.com/world/2025/jun/22/donald-trump-says-us-has-attacked-three-iranian-nuclear-sites-and-totally-obliterated-them>

⁴⁹ "US Strikes on Iran's Nuclear Sites Only Set Program Back by Months, Pentagon Report Says," *The Guardian*, June 24, 2025, <https://www.theguardian.com/world/2025/jun/24/iran-strikes-nuclear-sites-report>

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from where 20% of the world's oil passes.⁵⁰ The conflict has caused havoc within and outside the region, seriously hampering global trade and economy, with skyrocketing global oil prices. Nevertheless, a fragile conditional ceasefire was declared on April 8, 2026, with Pakistan acting as the mediator.⁵¹

The unilateral US-Israeli strikes on Iran cannot be justified under international law,⁵² nor was there any tangible evidence that Iran was on the path to nuclear weapons development, nor did it pose any imminent threat to the US or Israel. Over the years, Iran cooperated with the IAEA even after the withdrawal of the US from JCPOA. However, despite repeated assurances from the IAEA that there was no clear evidence of weapons development,⁵³ the path to diplomacy and non-proliferation was abandoned by the US and Israel in favor of military options. There was also no credible evidence regarding the US claims that Iran could have developed nuclear weapons in as little as two weeks. The IAEA did not provide any evidence to that effect. In April 2026, Director General Rafael Grossi stated, 'While there has been no evidence of Iran building a nuclear bomb, its large stockpile of near weapons-grade enriched uranium and refusal to grant my inspectors full access are cause for serious concern.'⁵⁴ The comparison to case of Iraq comes to mind where it was declared that Iraq was developing weapons of mass destruction, but none were found even after the US-led military invasion of the country.

This unfortunate state of affairs and unilateral use of force in violation of the US Charter not only presents the fracturing nature of international law, but also an unraveling of the non-proliferation regime as well. The attacks against Iran have not only improved the public perception of the hardliners

⁵⁰ "US-Israel-Iran Conflict 2026," Policy Brief – March 2026, <https://ciss.org.pk/policy-brief-march-2026-us-israel-iran-conflict-2026/>

⁵¹ "Pakistan offers 'two-phased' truce deal to end US-Israel war on Iran," Al Jazeera, April 6, 2026, <https://www.aljazeera.com/news/2026/4/6/pakistan-offers-two-tier-truce-iran-wont-open-hormuz-under-temporary-one>

⁵² Ihsan Faruk Kilavuz, "The War on Iran and the Unravelling of Legal Order," *TRT World Research Centre*, April 9, 2026, <https://researchcentre.trtworld.com/publications/analysis/the-war-on-iran-and-the-unravelling-of-legal-order/>

⁵³ Kelsey Davenport, "IAEA Investigations of Iran's Nuclear Activities," *Fact Sheets & Brief*, May 2026, <https://www.armscontrol.org/factsheets/iaea-investigations-irans-nuclear-activities>

⁵⁴ "IAEA Provides Updates on Iran's Nuclear Facilities," *Nuclear Newswire*, April 6, 2026, <https://www.ans.org/news/article-7911/iaea-provides-updates-on-iran-nuclear-facilities/>

inside Iran but also weakened trust in international law and the non-proliferation regime.

Shift in Iranian Strategic Calculus

Abandoning the path to diplomacy and trust in non-proliferation in favor of military options is likely to further strengthen hardliners within Iran. Discussions within Iran regarding the nuclear path have shifted significantly from a policy of 'strategic patience' and nuclear energy capability towards an increasingly heated debate on nuclear deterrence and NPT withdrawal. This shift initially started after the US withdrawal from JCPOA, but more recently in the wake of military strikes on Iran's nuclear facilities in 2025 and the US-Israel war of 2026, as well as the perceived failure of international agreements to provide security or economic benefits.⁵⁵

The Realists or the hardliners are increasingly dominant within Iran. They argue that diplomacy is a dead-end and only exposes Iranian vulnerabilities.⁵⁶ They assert that the US and Israel would never accept a revolutionary Iran, no matter how Iran constrained its nuclear program. Their prescribed solution is a policy of maximum deterrence comprised of a robust missile program and expanding, moving closer to the nuclear threshold to make the cost of regime change high.⁵⁷ On the other hand, there are reformists or liberalists who are increasingly marginalized. They endorsed economics first approach through global integration.⁵⁸

There is a legislative push to withdraw from the NPT post the 2026 military strikes on Iran. Hardliner members of the Iranian Parliament introduced legislation to exit the NPT. On March 28, Malek Shariati, an Iranian parliamentarian, introduced legislation called 'Support for the Nuclear Rights of the Iranian Nation,' built on three pillars, including withdrawal from NPT, repeal of the law on JCPOA implementation, and formation of

⁵⁵ Hamidreza Azizi, "Iran and nuclear opacity: Strategic ambiguity, retaliation, and leverage," Middle East Council on Global Affairs, September 24, 2025, <https://mecouncil.org/publication/iran-and-nuclear-opacity-strategic-ambiguity-retaliation-and-leverage/>

⁵⁶ Ibid

⁵⁷ Habib Badawi, "Iran's Dual Strategy in the Middle East: Proxy Warfare, Nuclear Ambitions, and Strategic Recalibration," *Güvenlik Stratejileri Dergisi* 22, no. 53 (April 2026): 62–73, <https://doi.org/10.17752/guvenlikstrjtj.1729750>

⁵⁸ Krzysztof Strachota, "The Islamic Republic at an impasse: Internal instability following the Twelve-Day War" OSW Commentary, Vol. 700, December 18, 2025, 1–8, https://www.osw.waw.pl/sites/default/files/OSW_Commentary_700_0.pdf

new international agreements to advance peaceful nuclear technologies.⁵⁹ Ebrahim Rezaei, spokesman for the National Security and Foreign Policy Commission of Iran's parliament, shared the regime's opinion on his social media account on March 27 that NPT would become meaningless as it 'has had no benefit for us.'⁶⁰ While Fada Hossein Maleki, a member of the national security commission, was reported as saying that Iran should honor its international commitments.⁶¹ This was implicitly a reference to the NPT and perhaps the JCPOA as well. Esmail Baghaei, Iran's Foreign Ministry spokesman, confirmed on March 28 that the NPT withdrawal legislation had been introduced. At the same time, he also reaffirmed that 'the Islamic Republic of Iran has never sought, and does not seek, nuclear weapons...this is a matter of genuine discussion within public opinion and at the parliamentary level.'⁶²

Thus, should Iran choose to exit from the NPT, Article X permits a state-party to withdraw 'if it decides that extraordinary events, related to the subject matter of this Treaty, have jeopardized the supreme interests of its country.'⁶³ The state party is required to give a three-month notice and a statement on the extraordinary events that led to the decision. Iran can potentially state that the continued attacks on its nuclear facilities pose an existential threat to its exit from the NPT.

The official opinion in Iran had started to transform due to the persistent threat of strikes over its nuclear installations from Israel, even before the military strikes of 2025 and 2026 that paved the way for the legislation to withdraw from the NPT. The public discourse was already diluting the symbolic barrier of Ayatollah Khamenei's fatwa against nuclear weapons. In May 2024, Kamal Kharrazi, adviser to Khamenei, said, 'We have no decision to build a nuclear bomb, but should Iran's existence be threatened,

⁵⁹ Libby Flatoff, "Iran Threatens to Withdraw from the NPT," *Arms Control Today*, May 2026, <https://www.armscontrol.org/act/2026-05/news/iran-threatens-withdraw-npt>

⁶⁰ Libby Flatoff, "Iran Threatens to Withdraw from the NPT," *Arms Control Today*, May 2026, <https://www.armscontrol.org/act/2026-05/news/iran-threatens-withdraw-npt>

⁶¹ "Despite 'significant progress' in US-Iran negotiations, Trump's unpredictability remains a concern: Iranian lawmaker," *Dawn News*, May 28, 2026, <https://www.dawn.com/news/2003583>

⁶² Libby Flatoff, "Iran Threatens to Withdraw from the NPT," *Arms Control Today*, May 2026, <https://www.armscontrol.org/act/2026-05/news/iran-threatens-withdraw-npt>

⁶³ 'Treaty on the Non-Proliferation of Nuclear Weapons (NPT),' <https://www.iaea.org/publications/documents/treaties/npt>

there will be no choice but to change our military doctrine.’⁶⁴ He further said that, ‘In the case of an attack on our nuclear facilities by the Zionist regime, our deterrence will change.’⁶⁵ Thus, the debate was clearly moving towards changing the posture if Iran ever faced an existential threat. Subsequently, after the Twelve Day War in June 2025, reports emerged of intense pressure from the IRGC commanders on Khamenei to formally rescind the fatwa against nuclear weapons.⁶⁶ Khamenei’s martyrdom in the US-Israel strikes may have cleared a path for Iran’s hardline factions to rethink the fatwa ruling and solidify resolve to pursue a nuclear deterrent.

Thus, Iran would be well in it right to acquire nuclear weapons capability for self-defense in the future. Especially given that nothing but hard power and deterrence seem to work in countering military aggression from major powers. President Trump’s threats to bomb Iranian civilization back to the ‘Stone Age.’⁶⁷ further endorse the notion that only military might remain the guarantor of a country’s survival.

The Erosion of Global Non-Proliferation: Regional and Global Fallout

The abandoning of the non-proliferation diplomatic path in favor of force weakens trust in the rules-based international order. The prospects of Iran withdrawing from the NPT remain high and would have negative implications for the already weakened non-proliferation regime. This Iranian decision could potentially initiate a cascade of withdrawals from the NPT, triggering a domino effect where other countries in the region and across the globe may decide to pursue nuclear weapons capabilities.⁶⁸ Iran’s NPT withdrawal and potential pursuit of a nuclear deterrent would also incentivize the rival states in the region to accelerate their own nuclear

⁶⁴ ‘Iran warns it will change nuclear doctrine if ‘existence threatened’,’ *Al Jazeera*, May 9, 2024, <https://www.aljazeera.com/news/2024/5/9/iran-warns-it-will-change-nuclear-doctrine-if-existence-threatened>

⁶⁵ ‘Iran warns it will change nuclear doctrine if ‘existence threatened’

⁶⁶ Mostafa Salem and Leila Gharagozlou, “Cornered and wounded, will Iran now go for a nuclear bomb?” *CNN*, March 29, 2026, <https://edition.cnn.com/2026/03/29/middleeast/iran-nuclear-bomb-analysis-intl>

⁶⁷ Reuters, “Trump Says ‘A Whole Civilization Will Die Tonight’ if Iran Does Not Make Deal,” April 7, 2026; Amnesty International, “Iran: President Trump’s Apocalyptic Threats of Large-Scale Civilian Devastation Demand Urgent Global Action to Prevent Atrocity Crimes,” April 7, 2026. Trump says ‘a whole civilization will die tonight’ if Iran does not make a deal | Reuters

⁶⁸ Moonis Ahmar, “If Iran Goes Nuclear,” *The Friday Times*, May 14, 2026, <https://www.thefridaytimes.com/14-May-2026/iran-goes-nuclear>

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weapons program. It could, thus, cause a cascade of proliferation in the Middle East, making it a more dangerous place.⁶⁹ States could, in effect, conclude that with the unraveling of the global rules-based order, their best option may be to pursue a nuclear weapons capability of their own. It may trigger a classic security dilemma across the Middle East. Operating within an anarchic international system where state survival dictates a self-help imperative, Iran's strategic shift would alter the regional balance of power. According to Scott Sagan's 'Security Model' of nuclear proliferation, states build nuclear weapons to counter significant foreign threats.⁷⁰ Consequently, a nuclear-armed Iran would structurally compel regional rivals such as Saudi Arabia to accelerate their own military nuclear programs to balance the threat. This dynamic threatens to unleash a regional horizontal proliferation cascade. Ultimately, regional actors are drawing a stark neorealist conclusion: as liberal institutionalist frameworks and the rules-based non-proliferation order unravel, international treaties offer no centralized enforcement to guarantee security, leaving the unilateral acquisition of an absolute deterrent as the most rational strategic choice for survival.

Iran's withdrawal from the NPT would point to a weakening of nonproliferation norms, rules, and international legal structures that have been the bulwark against horizontal nuclear proliferation. The rules-based order may be replaced by the use of military coercion. As witnessed by the US and Israel's willingness to use force to achieve regime change and their desired outcomes may be the foreseeable trajectory in the region. It is likely to accelerate a shift toward a more confrontational geopolitical environment.⁷¹ This is already becoming apparent with the recent use of force in Palestine, Lebanon, Syria, Iran, and even to other regional countries. Therefore, clearly use of force in violation of the UN Charter on the false pretext of preventing proliferation may ultimately set off a chain reaction by states in pursuit of proliferation across the region. States may

⁶⁹ Jamie Kwong and Nicole Grajewski, "Will Iran Withdraw from the Nuclear Non-Proliferation Treaty?," *War on the Rocks*, November 1, 2024, <https://warontherocks.com/will-iran-withdraw-from-the-nuclear-non-proliferation-treaty/>

⁷⁰ Scot Sagan, "Why do states build nuclear weapons? Three models in search of a bomb," *International Security*, Vol. 21, No.3, 1996, 54–86

⁷¹ Joseph Rodgers, "Iran and the Changing Character of the Nonproliferation Regime," *Center for Strategic and International Studies*, June 20, 2025, <https://www.csis.org/analysis/iran-and-changing-character-nonproliferation-regime>

feel that hard military power and nuclear deterrence may be the only guarantor of their security.⁷²

Cases of Libya and North Korea may be instructive in this regard. Libya is a prime example of a country that decided to dismantle its Weapons of Mass Destruction (WMD) program under the leadership of Muammar Gaddafi in 2003, in exchange for sanctions relief. However, that fateful decision led to the weakening of Libya, thus making it possible for NATO to intervene in Libya, leading to Gaddafi's death in 2011. The Libyan episode set an example for the rest of the countries that by giving up strategic capabilities, it may not lead to an increase in security, but would rather encourage states to use military force against that country. Even more illustrious is the case of North Korea, in which Pyongyang withdrew from the NPT in 2003, and subsequently developed nuclear weapons and an advanced missile delivery system with a capability to reach the US mainland. Despite extreme isolation and sanctions, North Korea's nuclear deterrence compelled the US to engage in two summits, without any success. Tehran and others would conclude the North Korean and Libyan case studies that sovereignty can only be guaranteed by a credible and robust nuclear deterrence.⁷³

The case of Ukraine is also important in this regard. Following the disintegration of the Soviet Union, Ukraine had the third-largest nuclear arsenal in the world on its territory, with an estimated 1,900 strategic warheads. Under the trilateral Massandra Accords and Budapest Memorandum, these weapons were transferred to Russia to be dismantled by 1996, in exchange for economic aid and security assurances from Russia, the US, and the UK.⁷⁴ It joined the NPT as a non-nuclear-weapon state. However, after the 2022 war with Russia, Ukraine has been repeatedly facing nuclear threats from Russia.⁷⁵ Several scholars in Ukraine now regret

⁷² Toby Dalton, 'Friendly' nuclear proliferation and its discontents,' *The Washington Quarterly*, Vol. 49, No1, 2026, pp. 7–25.

⁷³ Van Diepen, "Eight lessons for North Korea's nuclear and missile forces from the ongoing Iran conflict," 38 North, Henry L. Stimson Center, March 16, 2026, <https://www.38north.org/2026/03/eight-lessons-for-north-koreas-nuclear-and-missile-forces-from-the-ongoing-iran-conflict/>

⁷⁴ "Ukraine, Nuclear Weapons, and Security Assurances at a Glance," Factsheet, Arms Control Association, March 2022, <https://www.armscontrol.org/factsheets/ukraine-nuclear-weapons-and-security-assurances-glance>

⁷⁵ Polina Sinovets and Muhammed Ali Alkış, "Deterrence, Compellence, or Credibility Fatigue? Russian Nuclear Threats in the War on Ukraine," *Journal for Peace and Nuclear Disarmament* 8, no. 2 (2025): 393–408, <https://doi.org/10.1080/25751654.2025.2586386>

giving up nuclear weapons, and there were speculations that Ukrainian defense officials had suggested assembling a simple nuclear device within months was possible, although it was later denied by the Ukrainian Ministry of defense.⁷⁶ Thus, Ukraine's case also has valuable lessons – only a robust military power, and nuclear deterrent can ensure security of a country.

With the weakening of non-proliferation norms and prominence of blatant use of military power, the salience of nuclear weapons and states' reliance on nuclear deterrent is increasing, and if Iran opts to withdraw from NPT, it may set off a domino effect across the region. Saudi Arabia has made it clear many times that if Iran develops nuclear weapons, it will also do so. Saudi Crown Prince Mohammed bin Salman clearly stated in 2018: 'Without a doubt, if Iran developed a nuclear bomb, we would follow suit as soon as possible.'⁷⁷ Saudi Arabia is already negotiating for a civilian nuclear program with the US. Unfolding details indicate that the deal may establish uranium enrichment and plutonium reprocessing facilities within Saudi Arabia rather than importing fuel from abroad.⁷⁸ Some analyses highlighted that this Saudi demand is designed to establish a latent nuclear capability – an infrastructure that could be used to pursue a weapons program if the regional security dynamics require so in the future.⁷⁹ In contrast, the UAE is also undergoing civil nuclear cooperation with the US, but has foregone domestic enrichment and rather directly imports fuel assemblies from South Korea.⁸⁰ While the UAE has shown no aspirations to build a nuclear weapon, it lacks the enrichment and reprocessing facilities that may be needed for technical expertise to develop nuclear weapons.

⁷⁶ "Ukraine gave up its nuclear weapons. Now it's asking why," *BBC*, December 5, 2024, <https://www.bbc.com/news/articles/crl3ndxglwxx>

⁷⁷ Mostafa Salem and Leila Gharagozlou, "Cornered and wounded, will Iran now go for a nuclear bomb?"

⁷⁸ "Proposed Saudi-US deal could allow uranium enrichment, arms control experts warn," *PBS*, February 20, 2026, <https://www.pbs.org/newshour/world/proposed-saudi-u-s-deal-could-allow-uranium-enrichment-arms-control-experts-warn>

⁷⁹ Joseph Rogers, "Iran and the Changing Character of the Nonproliferation Regime," *CSIS*, June 20, 2025, <https://www.csis.org/analysis/iran-and-changing-character-nonproliferation-regime>

⁸⁰ Darya Dolzikova, "The US-Saudi Nuclear Deal: Supply Chain and Non-Proliferation Implications," *RUSI*, November 26, 2025, <https://www.rusi.org/explore-our-research/publications/commentary/us-saudi-nuclear-deal-supply-chain-and-non-proliferation-implications>

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Türkiye's response is diplomatically nuanced, and it still would take years for its first nuclear power plant to become operational. However, Türkiye has hinted at a systemic rejection of nuclear asymmetry in its neighborhood. Türkiye currently relies on the NATO nuclear umbrella. However, President Recep Tayyip Erdoğan has publicly criticized the non-proliferation architecture and nuclear-armed states for forbidding Türkiye from acquiring its own deterrent. He explicitly said that, 'Some countries have missiles with nuclear warheads... But [they tell us] 'you can't have them.' This, I cannot accept.'⁸¹

Türkiye has been steadily deepening its civilian nuclear cooperation with Russia through the Akkuyu nuclear power plant, of which the first unit is expected to become operational by late 2026. While these reactors are under the IAEA safeguards, civil nuclear power infrastructure provides Ankara with the technical expertise that may subsequently be utilized for nuclear weapons purposes if new nuclear powers emerge in the region and the regional security environment may deteriorate further.⁸²

The cascading effect in the Middle East may unfold in slow motion. Iran's neighbors, like Saudi Arabia, Turkey, and others, may engage in hedging.⁸³ With basic civilian nuclear infrastructure and capacity to produce low-enriched uranium would give them a baseline should they choose to pursue nuclear weapons capability. This would create a highly volatile environment where multiple states could possess latent nuclear capabilities. Ultimately, powers like Turkey, Saudi Arabia, and possibly Egypt may view indigenous nuclear capabilities as the only guarantor in a deteriorating regional environment where they could just become collateral damage in a conflict between Iran and the US-Israel.

Other countries around the globe could potentially join the proliferation cascade. There have been debates in Japan over the issue of nuclear

⁸¹ Ezgi Yazigioglu "A Look Upon Turkey's Future Nuclear Weapons Policy," September 30, 2019, <https://www.iris-france.org/en/a-look-upon-turkeys-future-nuclear-weapons-policy-3>

⁸² Rameen Siddiqui, "The Nuclear Domino: How the Iran War Changed Nuclear Politics Forever," April 26, 2026, <https://moderndiplomacy.eu/2026/04/27/the-nuclear-domino-how-the-iran-war-changed-nuclear-politics-forever>

⁸³ Jana Baldus, Harald Müller, and Carmen Wunderlich, "The Global Nuclear Order and the Crisis of the Nuclear Non-Proliferation Regime: Taking Stock and Moving Forward," *Zeitschrift für Friedens- und Konfliktforschung* 10, no. 2 (2021): 195–218, <https://doi.org/10.1007/s42597-021-00066-0>

weapons. In 2024, Japanese Prime Minister Shigeru Ishiba called for an Asian version of NATO, which could introduce nuclear weapons in the region.⁸⁴ Similar debates are taking place in South Korea in response to the nuclear threat from North Korea. In 2023, South Korean President Yoon Suk Yeol said, 'It's possible that the problem gets worse and our country will introduce tactical nuclear weapons or build them on our own.'⁸⁵ Public polling in South Korea consistently shows majority support for an indigenous nuclear program.

This will make the region a very dangerous place. In the Middle Eastern context, Kenneth Waltz's argument 'more will be better' would not work.⁸⁶ On the contrary, as Scott Sagan argued, new nuclear states would likely not have adequate organizational controls over their new weapons capabilities, resulting in a greater risk of deliberate or accidental nuclear war.⁸⁷ There would also be a greater number of nuclear dyads, making deterrence complex and risk-prone.

The unraveling of non-proliferation in the Middle East and across other regions of the world would further undermine the NPT-based global non-proliferation architecture. NPT has not made any substantive progress on disarmament since its inception, and the promise of nuclear-weapon states on disarmament remains unfulfilled. The Iran conflict has threatened the existence of the NPT and the so-called rules-based order. It demonstrated that a country that engaged in good-faith diplomacy over the years could not ensure its security in exchange for limits on its nuclear program.⁸⁸ Thus, recent events have hollowed out the treaty's foundational logic and have precipitated a systemic crisis of faith in international diplomacy. Moreover,

⁸⁴ Kim Kelly, "Incoming Japan PM Ishiba's 'Asian NATO' idea test for US diplomacy," *Reuters*, September 27, 2024, <https://www.reuters.com/world/asia-pacific/incoming-japan-pm-ishibas-asian-nato-idea-test-us-diplomacy-2024-09-27/>

⁸⁵ "In a First, South Korea Declares Nuclear Weapons a Policy Option," *The New York Times*, January 12, 2023, <https://www.nytimes.com/2023/01/12/world/asia/south-korea-nuclear-weapons.html>

⁸⁶ In Kenneth Waltz and Scott Sagan, *The Spread of Nuclear Weapons: A Debate Renewed* (W.W. Norton, 2002) Kenneth Waltz argues that due to the sheer destructive potential of nuclear weapons 'more may be better' since it will create deterrence and prevent conflict.

⁸⁷ Kenneth Waltz and Scott Sagan, *The Spread of Nuclear Weapons: A Debate Renewed* (W.W. Norton, 2002)

⁸⁸ Rameen Siddiqui, "The Nuclear Domino: How the Iran War Changed Nuclear Politics Forever," *Modern Diplomacy*, April 27, 2026, <https://modern diplomacy.eu/2026/04/27/the-nuclear-domino-how-the-iran-war-changed-nuclear-politics-forever/>

a cascade of nuclear proliferation in the Middle East region and across the world would render the NPT irrelevant and would harken the return of a Waltzian self-help world.

Conclusion

By early 2025, Iran's nuclear program stood further advanced than it did in 2018 when the US withdrew from the JCPOA. The US and Israeli strikes in 2025 and 2026 may have destroyed some or all of Iran's nuclear facilities. However, there is a deep trust deficit between the US and Iran, after the US and Israel struck Iranian nuclear installations and attacked Iran in the middle of diplomatic processes. In 2025, right after the April diplomatic rounds of talks, Israel and the US bombed Iranian nuclear facilities, and again in February 2026, just a day after the diplomatic talks, both the US and Israel attacked Iran even though the diplomatic breakthrough appeared to be within reach, as stated by the Omani Foreign Minister.⁸⁹

Iranian acquisition of the nuclear deterrent would alter the strategic calculus of the entire Middle East, opening increased prospects of regional proliferation. Facing an acute security dilemma and stripped of faith in international guarantees, neighboring states may feel structurally compelled to mirror Tehran's posture. This cascading domino effect risks completely unraveling the global non-proliferation architecture, replacing a rules-based order with a hyper-militarized, multi-polar regional subsystem where the quest for survival would dictate the acquisition of an independent nuclear deterrent. The impending unraveling of the non-proliferation regime may systematically strip away liberal institutional illusions, leaving independent hard power and nuclear hedging as the sole viable guarantor of national security in an anarchic international order. These events provide a stark validation of Kenneth Waltz's structural realism. The post-JCPOA crisis proves that within an anarchic international system, international law and regulatory treaties are subservient to major power interests. The repeated use of military force may revert the global arena to a self-help environment.

⁸⁹ The National, quoting Oman's foreign minister Badr Al Busaidi on February 28, 2026, <https://www.facebook.com/TheNationalNews/posts/omans-foreign-minister-badr-al-busaidi-said-he-was-dismayed-by-joint-us-israeli-/1356822973140790/>