

An Israeli Assessment of the Iran Deal

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ABOUT THE AUTHORS



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Michael Herzog was appointed Israel's ambassador to the United States in 2021. Previously, he was an international fellow at The Washington Institute.

BICOM Senior Visiting Fellow Brig. Gen. (res.) Michael Herzog gave his assessment of the Iran deal and its implications in a BICOM phone briefing on November 25. The following is a summary of his assessment, covering the positives and negatives of the interim deal, concerns around the endgame, and Israel's position. General Herzog is also a Milton Fine International Fellow with The Washington Institute.

THE INTERIM DEAL

This is an interim deal for six months, so ultimately the judgment will have to be made in the context of the next phase, which is the comprehensive endgame deal. However, we can identify some positive and negative elements of the interim deal.

MAIN POSITIVE ELEMENTS

- The preamble stipulates that under no circumstances will Iran seek to develop nuclear weapons. This of course is only declaratory, but it has significance in case of a future violation by Iran.
- In practical terms, it more or less stops the clock on Iran's nuclear programme. Under the deal they stop enriching uranium to 20 percent and they convert existing stockpiles. They continue to enrich to 3.5 percent but cannot add centrifuges, and any addition to their existing stockpile will be converted to oxide form.
- They are not supposed to manufacture any new centrifuges except for repairs, or operate the new generation of centrifuges.
- The inspections will now be on a daily basis, implicitly involving cameras, and will also cover the manufacture of centrifuges, which is a new element.

MAIN DEFICIENCIES

- The deal implicitly recognises Iran's right to enrich. This was a major stumbling block because Iran wanted a specific mention of this right. They are allowed to continue to enrich in the interim period, and the end of the document refers to guidelines for the endgame, in which it is clear Iran will be allowed to enrich.
- All the measures which stop the clock are reversible. No centrifuges are disabled and no site is decommissioned or mothballed. Even the stockpiles of enriched uranium converted to oxide form can be converted back.
- Regarding the heavy water processing facility and reactor at Arak, which could provide plutonium for a nuclear weapon, the agreement is that they will not advance the fuel cycle of the reactor, but it allows Iran to continue the

physical construction.

- The IAEA's concerns on past and current activities dealing with the military dimension of Iran's programme are not addressed.
- The deal implicitly legitimises Iran as a member of the community of nations, and may allow it a freer hand to continue other negative activities in the region beyond the nuclear programme, including support for Assad in Syria, Hezbollah's terrorist activities, etc.
- The significance of the sanctions relief is not clear. There will be no additional sanctions, no more pressure on Iranian oil exports, they will be able to export gold and other precious metals, and sanctions will be lifted on petrochemicals, automotive industries and more. Estimates of the benefits to Iran range considerably from \$5 billion to \$20 billion. Though this is not the collapse of the sanctions regime, there is major concern about the psychological impact of drilling a hole in these sanctions.

LACK OF CLARITY ON THE ENDGAME

- There seems to be no agreement amongst the P5+1 when it comes to the endgame. The guidelines in the deal regarding the endgame are not very promising because they implicitly recognise the Iranian right to enrich and suggest that sanctions will be fully lifted, but do not clearly address the concerns of Israel and many others in the region: will it really take Iran significantly back from the capacity to breakout to nuclear weapons through the dismantlement of core components in its programme?
- On enrichment, there is a need to define the endgame in concrete terms of setting the clock back on the breakout capacity (to military grade uranium and a nuclear device). Today they can breakout in between one and two months to one bomb's worth of military grade enriched material, so what is the endgame goal? According to a senior US official the goal is for the breakout time to be years instead of months, but this has not been clearly defined.
- On the plutonium track, the deal implies the endgame goal is to turn the plutonium plant from heavy water use to light water use (which removes the proliferation risk), but it has to be clearly defined.
- The endgame has to clearly address IAEA concerns about the military dimensions of the Iranian programme, to be included in the monitoring regime. It is not clear how open files relating to suspicions around military research and weaponisation will be dealt with.
- The question also has to be asked: What do the Iranians assume will happen if there is no agreement in six months? They will still have all their capabilities. Meanwhile, the threat of more sanctions is not clear, and they do not see facing them a credible threat of a US military option. It is also important to effectively enforce existing sanctions during the interim period.

ISRAEL'S ROLE

- It is important for Israel to work quietly and efficiently with the US and the other countries to try and influence the endgame deal. Israel had some impact on the interim deal but not a significant amount, and not around the shape of the endgame.
- Israel is now fixing its sights on the end of the six months and will start a dialogue with the US on the desired endgame. The next decision point for Israel will be at the end of this interim period. If there is a deal, Israel will have to judge it on its merits and decide how to act. Alternatively, there will be no deal and talks will continue beyond the six months, which is a very likely scenario. Facing a strung out process will put Israel in a dilemma of deciding if and when to intervene.

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