Iran's Nuclear Tightrope: Between Power and Peril

[00:00:00] Iran Not a Model

Eric Brewer: I feel pretty confident that no country will come away from this and look at Iran and say, "That's the successful case of latent nuclear deterrence. That's what I want to try to reproduce," because the Iran case clearly was not.

[00:00:12] Introduction

Ryan Vest: Welcome to *Horns of a Dilemma*, the podcast of the *Texas National Security Review*. I'm Ryan Vest, executive editor of *TNSR*, and I'm here with our editor-in-chief, Dr. Sheena Chestnut Greitens. We're pleased to have joining us today Eric Brewer, author of "What Good Is a Nuclear Threshold Capability? Lessons from Iran's Nuclear Program and Recent Regional Conflict," which is featured in Volume 9, Issue 3 of *TNSR*.

Eric is Deputy Vice President for Nuclear Material Security at the Nuclear Threat Initiative. He formerly served as the Director for Counterproliferation at the U.S. National Security Council, Deputy National Intelligence Officer for WMD and Proliferation at the National Intelligence Council, and senior intelligence analyst for Iran at the Defense Intelligence Agency.

Eric, welcome to *Horns of a Dilemma*. It's great to have you on the show.

Eric Brewer: Thanks to you both for having me. Great to be here.

[00:01:04] Threshold Deterrence Basics

Sheena Chestnut Greitens: Eric, one of the things I really appreciated about your article is that it examines this idea of whether being not a nuclear power, but a near nuclear power can provide a measure of effective deterrence. And you go into a lot of detail on Iran's experience over the last few years in trying to do that.

So just for listeners to preview your article and your core argument in a nutshell, what does that look like in practice? And if you look back over the last decade,

can you just give us that initial overview of how Iran has leveraged nuclear latency as a deterrence to promote its interests, or tried to, and then we'll dive into some of the details in just a minute here.

Eric Brewer: Yeah. So, I mean, I think as we all know, US policy has long worked to prevent Iran from getting nuclear weapons. But I think a related concern that the United States has always had, and a goal that the United States has always had, has been to prevent Iran from becoming a threshold state.

The Iran nuclear deal back from 2015 is a good example of that, where it tried to keep Iran one year from being able to break out to a nuclear weapon.

And so I think it's fairly easy to understand why, right? Because Iran could use that latency and that threshold status to either implicitly, or explicitly, threaten to go nuclear, to try and deter, or coerce the United States. As Iran gets closer to nuclear weapons, it's obviously harder to stop it from actually crossing that threshold diplomatically and militarily. And I think, you know, we've worried that Iran, even at the threshold, could potentially fuel proliferation in the region, in the Middle East, and we see Saudi interested in pursuing enrichment today. And so that's an example of how that's worked.

And this isn't only a policy perspective, right? A lot of the literature on nuclear proliferation and nuclear latency has grappled with this, and looked at the potential benefits of latency and hedging. But as we also all know, and as I talk about in the article, nuclear latency is a double-edged sword. And it also comes with risks, right? Those include things like economic sanctions, diplomatic isolation, and of course military action, at the sort of the extreme end of the spectrum. And again, the literature on this is kind of mixed on whether or not latency provides more benefits or risks.

So, I look at Iran in this article as a test case, and I think it's a really interesting one, because Iran is at such, or was at such an advanced stage of nuclear latency. And the period that I look at in the article, which is late 2023 through early 2025, where Iran found itself in the middle of a really serious crisis, and conflict, and ultimately war, which arguably sort of sharpens the edges of this double-edged sword, right?

Because, Iran, you know, in the course of that crisis, it had incredibly high stakes, arguably later on even, perhaps its survival was on the line. Because of that, because of the challenges of the military option, Iranian threats to go nuclear should arguably be credible, right? If there was ever a time for Iran to draw on that latency and actually produce nuclear weapons, or threaten to

produce nuclear weapons for deterrence, this was probably it. Yet doing so could have prompted the very attack that Iran hoped to avoid.

So I talk a lot about that in the article, and whether or not Iran saw that program as a strength or a vulnerability, and whether or not it actually succeeded in trying to leverage that latent nuclear deterrence, whether it did so successfully.

And so sort of the second part of your question, which is about how has Iran traditionally viewed its nuclear latency and tried to use it for national security goals. I think Iran has tried to use that program as really part of its broader deterrence triad, right? That triad includes proxy capabilities, right, through terrorist groups, its missile and drone capabilities, and then that third component, which is the threshold and the ability to build a bomb.

And so historically, though, while Iran has, you know, always kind of threatened to expand the nuclear program, you know, add centrifuges, increase enrichment in response to international pressure–the threat of proliferation was mostly implicit rather than explicit. And Iranian officials usually downplayed their interest in nuclear weapons and highlighted the Supreme Leader of Iran's fatwa, right, this religious ruling that prohibited the production of nuclear weapons. And threshold was generally viewed as good enough of a deterrent.

We saw this change in the course of the conflict, particularly in April 2024, where Iranian officials started openly debating whether or not to produce nuclear weapons, and cross the threshold. And you saw some officials explicitly saying that if Iran were attacked, that they would go nuclear. And so this was, I think, a really important twist on the past strategy. But as I argue in the article, ultimately, this didn't work out very well for Iran and ultimately the threshold, in trying to leverage it, caused them more harm than it did good.

[00:06:05] Latency Versus Intent

Ryan Vest: Now, you've already touched on this a little bit, but I want to dig a little bit deeper. In the article, you emphasize that nuclear latency should be seen as a measure of capability rather than one of intent. Why is this distinction analytically important, especially in the case of Iran?

Eric Brewer: So I think latency measures capability, right? And it's best thought of as a spectrum that can range from having very little nuclear capability on one end, to having, you know, almost all of the pieces in place for a nuclear weapons program on the other, right?

Countries with nuclear energy programs that have no nuclear weapons ambitions whatsoever, those countries have nuclear latency. And Iran had a very high degree of nuclear latency throughout the time period that I examine in the article, right? It had stockpiles of 60% enriched uranium. It had a very massive fuel cycle. And it also had some of the other pieces in place that could help it produce an actual nuclear bomb.

But Iran wasn't just a latent nuclear state, Iran was also a nuclear hedger. It was deliberately developing a lot of these capabilities specifically to give it that bomb option, while not going all the way, right? There's no indication, at least publicly available, that Iran had ever made a decision to produce nuclear weapons. And there's a really great definition of hedging out there that I use, that it's latency plus intent.

And why I think this matters in the case of the article is because it really helps to make threats to proliferate credible. But also at those higher levels of latency and as a threshold state, Iran found it very hard to assure the international community that it wasn't actually producing nuclear weapons. And again, I argue that Iran never made that decision throughout the course of the crisis, but it did try to get closer to a nuclear weapon and make it easier to produce one, and that these steps were ultimately one of the factors that contributed to decisions by Israel, and later the United States, to strike Iran in June of 2025. There's a lot of other factors that I think maybe we'll get into later, but that was certainly one of them.

[00:08:09] True Promise Turning Point

Sheena Chestnut Greitens: Yeah, I actually do want to walk through this critical period that you emphasize, this crisis period in 2024, 2025. And so you write in the piece about Operation True Promise and how that marked Iran's first direct attack on Israel in April 2024. How do you see, and how does the article characterize that operation, and the way that it maybe altered the relationship between Iran's conventional deterrent capabilities, between proxy forces as deterrent capabilities, and then the nuclear latency deterrent?

Talk to me about how that started to shift in this period.

Eric Brewer: So as you know, Operation True Promise 1 was a big deal. It was the first ever direct attack by Iran against Israel, which was in response to an Israeli attack on the Iranian consulate in Syria. Iran launched roughly 300 ballistic missiles and drones as part of the attack.

And so it was a big deal. It was a big gamble for Iran, right? After the attack, Iran really couched it as a victory. It talked about the attack establishing, what it called a new equation in the region, by which, you know, any additional attacks against Iran would be sort of met with overwhelming force. But the attack was also very calibrated, right? Iran gave a lot of warning publicly and privately, that it was going to launch this attack. It led the attack with slower-flying drones, which were easier to intercept, and again, sort of gave warning of that strike. A lot of the missiles were intercepted.

Most were intercepted. There was also a number that even failed to launch, and a lot of them proved less accurate than it expected. So, you know, despite these claims, and perhaps perceptions by the Iranians of victory, I argue that it demonstrated a big dilemma that Iran faced during this crisis, and one that it never really escaped from. This dilemma basically is that if Iran goes small in retaliation, it risks being viewed as weak, and inviting further aggression. However, if it goes too big, it risks major escalation and retaliation by Israel, or later the United States, that could potentially implicate core Iranian interests, and threaten its survival.

So after True Promise 1 is when we also see this shift in Iranian rhetoric on the nuclear program, where officials start to come out, and start to talk about if Israel responds and attacks Iran, Iran might have to re-look its nuclear doctrine, which was kind of a nod to revising the fatwa on producing nuclear weapons. And we start to see Iran, conclude that its threshold capability, which for, as I said at the outset, had long sort of believed was adequate for security, may no longer, in fact, be enough, and that it might need to move further down the pathway towards actually building a bomb.

Ryan Vest: This shift in rhetoric is kind of interesting, the way that they've changed the way they talked. And in the article you talk about, how after about April of 2024, Iranian nuclear rhetoric shifted from this implicit threshold signaling, to more explicit references about weaponization. How do we interpret, or how should US policymakers interpret this rhetorical escalation? Especially when it regards the degradation of Iran's deterrent pillars, that was happening about that time of proxies and missiles, and pushing Tehran to rely more heavily on possible nuclear signaling, or nuclear thresholding?

Eric Brewer: Yeah, it's a great question. I mean, in my reading of it, I think this really reflected Iran trying to grapple with serious and growing threats to its core interest, and its security environment. I think some of this rhetoric was probably coordinated, but some was also very organic.

One of the quotes that's most widely noted was from an IRGC–Islamic Revolutionary Guard Corps official–who's in charge of defending Iran's nuclear sites. And he said, you know, if Israel attacks these sites, or in some variations even threatens to attack these sites, Iran might revise its nuclear doctrine. And this quote was picked up in the Iranian press, recirculated, and promoted, suggesting that if it wasn't planned, it was something that the regime at least saw as valuable, and wanted to highlight.

Some of these threats were vague, others were explicit. And it wasn't just kind of hardliners talking about this. There were a number of individuals kind of across the political spectrum, who were either sort of explicitly threatening, or sort of suggesting that Iran may need to go down the nuclear weapons pathway, including one of those being a foreign policy advisor to the Supreme Leader. And so I think this period really begins the phase when Iran started to see its deterrent strategy and threshold capability as less of an asset serving its goals, and more of a liability.

[00:13:00] Setbacks and Quiet Advances

Eric Brewer: Beginning that summer of 2024, and into the fall, I argue Iran experienced a series of strategic setbacks and surprises. Some of those kind of, you know, unplanned, such as the death of the, then president, and other senior officials in a helicopter crash. But other things that really hobbled and eroded two out of three of Iran's deterrent pillars, the proxy capabilities and Iran's missile force, which made the nuclear pillar both more vulnerable, because Iran didn't have the same options to defend the nuclear sites and to retaliate for any attacks against them, but also more important because it really couldn't use the other two pillars in the way that it once could.

And, you know, I'll just walk through a couple of examples of those setbacks. By that time, Iran had really failed in its strategy of ending Israel's war against Hamas, and Hamas was decimated as an organization. And it also, going into the summer and the fall, failed to keep Hezbollah out of that war. And to quote, I think it was an Israeli official at the time, both of those organizations were rendered military irrelevant by September.

We also have the October 26th Israeli attacks on Iranian air defense and missile production equipment, again, sort of touching on this second pillar of the Iranian deterrence triad. And so by the end of that time, you know, these pillars were significantly eroded. And again, I think a US official described Iran as, quote, "essentially naked."

So all of this led Iran to actually tone down the rhetoric on its nuclear program over this period, and really double down on diplomacy, and support efforts towards a ceasefire. It also doubled down on nuclear diplomacy at that time. I mean, I think even a couple of days after a censure at International Atomic Energy Agency Board of Governors, Iran's foreign minister met with E3 diplomats in New York, again, showing that, you know, that sort of thing didn't really affect Iran's calculus on diplomacy, and it was still really willing to be.

But despite doing those things, or I should say alongside doing these things, Iran also sought to quietly advance its weaponization work, to get closer to a bomb. This is a little murky, but there are, you know, several press reports out there, several news articles that talk about Iranian researchers engaging in some of those activities and some of those steps that could make it easier for Iran to actually produce a nuclear device.

[00:15:36] From Early Gains to Failure

Sheena Chestnut Greitens: This is really interesting, right? Because the story you're telling in this article is one about Iran achieving some early success in deterring diplomatic pressure and limiting US responses to some of its behavior, but you really argue that these gains were temporary. And so I guess I wanted to ask you, you know, what do you see as explaining overall this transition from partial initial success to really strategic failure?

And before I ask you to answer that, maybe let me just level set a minute, for listeners. We're recording this at the end of May of 2026. We have no idea, even if we publish this tomorrow, exactly what will be going on in the US-Iran relationship, which is sort of moving quickly, in some ways, at the moment.

But when we talk about this shift from initial success to strategic failure, right? Once Iran experiences a large-scale military attack, that's the moment at which this becomes a strategic failure in your article, right? I just want to make sure that we're accurately representing your arguments, and the period of evidence that you're looking at here, so that listeners who are maybe watching current unfolding news about Iran are clear about what we are, and aren't calling the strategic failure.

Eric Brewer: Yeah, it's a great thing to flag, right? So I argue in the article that Iran never had any success deterring Israel, right? It did, as you know, and I think had some early success in deterring US diplomatic pressure, and limiting some of the US responses to proxy attacks, but that was temporary.

And so, if you look at some of the early months of the crisis that kicked off, you know, after the Hamas attacks on October 7th, I do think there is some evidence that Iran's threshold status, its overall deterrent, its the risk that nuclear capability could expand, did deter a resumption of US diplomatic pressure. Again, I look a lot at the IAEA Board of Governors, and probably also induced some US restraint and caution in responding to those proxy attacks against US and international shipping.

This all seems like, you know, like it happened ages ago now, given how many, you know, sort of what's transpired since. But people may recall that in the wake of the October 7th attacks, there was a massive series of sustained, coordinated attacks by Iranian proxy forces, proxy groups against US forces in Iraq and Syria and elsewhere, and of course, Houthi attacks against international shipping. And so I argue that evidence suggests, during this period, US officials were worried the escalation in the region could also lead to escalation on the nuclear program, and vice versa. And this kind of contributed to some early restraint on the US part.

I do think it's important to flag that this was heavily influenced by US strategy for the region, which was heavily anchored in the pre-October 7th world, right? You may remember before October 7th happened, the US vision for the region was essentially to try to keep a lid on the nuclear program in Iran, eventually working towards a longer-term sustainable deal, while also getting Saudi-Israeli normalization. And so those basic goals remained in the post-October 7th world, like that same vision still guided US policy, and US strategy early on. And because of that, containing the war and the crisis, preventing it from escalating and eventually getting to a place where it could wind down, was critical. And so anything that risked that was undesirable, including US actions that might cause Iran to escalate and respond.

But as you know, this success was short-lived, and so why was that short-lived? By around February, Iranian success on this front started to fade. And that's essentially because Iran overreached in a number of areas, I argue. We had by that point well over 100, I think it was 150 proxy attacks against US forces that ultimately, ended up killing US service members. And that led to a major US retaliation against Iranian proxies and Islamic Revolutionary Guard Corps facilities and personnel in Iraq and Syria. And that was enough to basically cause Iran to tell its proxies to cool it, and to hold off on any further attacks.

We also saw around that time growing international concern from the US, from Europe, from Israel and others, about Iran's growing 60% stockpile, that led Iran to actually reduce that stockpile slightly. Those concerns on the nuclear front, as

well as Iran sort of stonewalling international inspectors and their investigation, led the United States to choose to move forward with a resolution at the Board of Governors. Also critical in that calculation as well is not wanting to break with its European allies, who had long been pushing for this resolution. So it was a sort of a series of developments that led the US to make a different series of policy decisions, that basically ended this short-lived progress that Iran had had.

[00:20:58] What Evidence Shows

Ryan Vest: One of the troubles that I think we often encounter, when we're studying authoritarian regimes worldwide, is that it's very difficult to get inside the regime, and understand what's happening actually inside their governments, and we end up relying on a lot of indicators and evidence from the outside.

You've talked already about how initially, Iran's nuclear threshold status did offer some measure of deterrence, but eventually failed overall. I was wondering if you could talk a little bit about some of the indicators that you've seen, some of the evidence that you've seen, that kind of led you to your conclusions. And then how can we pull that apart from some of the other effects that were going on at the same time, like US domestic politics, Israeli domestic politics and threat perception, some of the proxy escalation, and regional wars that were going on at that time? How did those also play into these conclusions?

Eric Brewer: Yeah, it's a great question. And as you know, as you both know, and I'm sure as your r listeners and watchers know, it's always incredibly challenging to assess, you know, not just what's in the minds of the different leaders. But, you know, what do we look at, in determining whether or not deterrence worked, and whether or not the nuclear program, in this case, the threshold, played any role at all in that vis a vis other factors.

So again, you know, I do argue that Iran's threshold played a role in deterring US and diplomatic and military responses early on, but it never deterred Israel and ultimately failed to deter major military attacks against Iranian territory.

One thing I explore in this piece, one question I examine, in trying to assess, sort of the role of Iran's threshold in producing those results, or other factors is, you know, we know Israel ultimately struck into Iranian territory, including the major attacks in October of 2024, and then later, you know, June of 2025, where the US joined.

But sort of what explains the fact that Israel didn't strike Iran's program earlier, right? Could it be that perhaps the nuclear program played a role in inducing that Israeli restraint? For example, I kind of explore this hypothetical argument, or scenario where, you know, you could imagine, because of the degradation to Iran's missile capabilities and its proxies, that because of those developments, that opens up the possibility that with those gone, maybe it was the threshold. As kind of the only remaining capability that was inducing Israeli restraint up until that point.

But when I looked at that question, I see better explanations for explaining Israeli behavior and the lack of a strike on Iran's nuclear facilities at that point, and sort of the timing of subsequent strikes, and I'll talk maybe about a couple of those. I think you look at the US role here, and I think that played an important influence in Israeli calculations. Under the Biden administration, the United States urged Israeli restraint during this time, right? They really tried to work to prevent Israel from going bigger against Iran, from striking nuclear sites, from striking some of the energy and infrastructure, as was reported to be under consideration.

The Trump administration didn't counsel that same restraint, and the Trump administration was ultimately willing to give that green light to Israel in June of 2025. And so I think the US role here mattered. You also look at, I think Israel was mostly focused in the early phases of the conflict, on Hamas and Hezbollah. That was kind of the priority. Those were the priority actors, sort of those were the priority theaters. It wasn't as focused on, sort of striking Iran's nuclear program, and going into Iranian territory.

And so I think if you look at also what caused those June strikes, June of 2025 on Iran's program. It wasn't just the progress that Iran's program was making, and concerns about Iran potentially being in a position where it could quickly build nuclear weapons, although I think it was that too. But there's other factors at play, right? I think there's other sorts of tactical and operational considerations. There were also reports that Iran was kind of nearing the place where it could mass produce ballistic missiles, for example.

So I think there's a lot of other factors that ultimately explain the decision by Israel to attack in June of 2025 when it did, and that are better explanations for, you know, to the degree you want to call it restraint, earlier restraint, or lack of attack on Iran's nuclear sites, than Iran's threshold capability.

Sheena Chestnut Greitens: I think this is really an interesting question. And so just to maybe kind of thread the needle here, and say what I think I'm hearing,

and you can correct, or clarify in response. It sounds like nuclear latency and the effect of it really did interact, right? This isn't a mono-causal story. Reality is complicated. So nuclear latency interacted with some Iranian signaling, with the post-October 7th maybe shift in Israeli risk tolerance, and the change in the US-Israel relationship with the new administration.

Am I kind of accurately summing up some of the important contextual factors that nuclear latency was working in?

Eric Brewer: Yeah, I think that's right. Right? I think it's a number of things, right? I think it's, as you mentioned, I think it's the changes to Israeli threat perception and risk tolerance in the wake of the October 7th attacks. I think, you know, again, this is a dynamic environment. The actors are watching, they're learning, they're kind of updating their beliefs and their assessments. I think Israel kind of also watched how Iran absorbed the blows against Hamas and Hezbollah in the October, uh, 2024 strikes, and sort of watched how Iran responded via Operation True Promise I and and II, how some of those capabilities performed, and probably concluded Iran was acting a little more cautiously, perhaps, than expected, and it was opting for more limited retaliation to avoid that escalation.

I also think, you know, this relates to that point. By June of 2025, Iran was also conventionally weaker. You know, and so Israel did not have to worry as much about retaliation from Hezbollah for example, or other Iranian proxies as a result of a strike on Iran's nuclear facilities, that the types of capabilities Iran would've traditionally used to respond to such an attack.

I also think, you know, again, you look at some of the things that Israel has been able to pull off. I think Israel was probably pretty confident in its intelligence on Iran's nuclear program and sort of the intelligence penetration of that program. And they probably believed, you know, that they would know about it, if Iran actually decided to go for the bomb, and could probably act in time if they needed to. You know, concerns about Iran's nuclear progress notwithstanding.

And again, to go back to, you know, the domestic politics and the differences between the United States and Israel, and the differences of the US administrations, I mean, I think, on the US side, I think the Biden administration and the Trump administration clearly had different risk tolerances. And Trump, I think, views military action as complementary to diplomacy, whereas Biden, I think, viewed military action as sort of a last-ditch option if diplomacy fails. And so, yeah, it is a complex mix of factors.

[00:28:37] More Capability Less Security

Ryan Vest: One of the most interesting points that you brought out in the article that really struck me is that you argued that between 2023 and 2025, more nuclear capability correlated with less security for Iran. In your view, is that relationship causal, or is that better understood as a symptom of Iran's deteriorating strategic environment during that period?

Eric Brewer: That's a really good question. I think a lot of it is correlation. You know, as we've discussed, I think Iran responded to a deteriorating security environment. Again, the erosion, the weakening of two out of the three pillars of its deterrent triad, the proxies and the missile capabilities–it responded to that by trying to advance the nuclear program, right? Because that program became more important.

But I think it's causal in the sense that those very advancements heightened Israeli and US security concerns, and concerns about Iranian proliferation. I think, you know, the Supreme Leader probably hadn't given the green light for a bomb in June of 2025, but evidence suggests they were doing things that got them closer. So again, those nuclear advancements certainly did play a role in the decisions by the US and Israel.

[00:29:54] Lessons for Future Proliferators

Sheena Chestnut Greitens: Okay, so I want to kind of widen the aperture for a minute here and ask you, you know, about the broader implications of this case and this story on two levels. One is, you know, how does our understanding of how nuclear latency did and did not work for Iran in this period contribute to the broader scholarly debate on the effects of nuclear latency?

And then second, what would you want policymakers to take away from the Iran case and from this conversation about latency and, you know, current or future threshold nuclear states, who might find themselves in a parallel crisis of some kind?

Eric Brewer: Yeah. So I think the bottom line lesson, you know, that the article highlights is that leveraging latency for deterrence is really hard. Iran arguably had a lot of things working in its favor, right? It had a very high degree of latency. It had a lot of the pieces in place to pursue a nuclear weapon. The stakes for Iran were incredibly high in the crisis, which should have made

Iranian threats to proliferate, to build a nuclear weapon credible. But Iran ultimately failed to walk that fine line, that I think all hedgers need to walk.

And so I think this kind of one of the lessons, or one of the takeaways in a way, that bears on the literature, I think this reinforces that states that are at that high end of latency, really find it hard to convince others that they won't go nuclear, right?

Like the threats to proliferate are obviously credible, right? They have the pieces in place. They have the motive. But I think, you know, trying to then convince others that you won't follow through with that is incredibly challenging. And for Iran, especially when it, you know, tried to shift its rhetoric in the spring of 2024, then backed off, that made it particularly challenging for Iran.

I talk in the article, and I've thought a little bit about SANS, about, you know, the Iran case, I think, is unique in some ways, right? Because I think in the Iran case, one thing that sort of, you know, drove it to the outcome that we ended up in is you have Israel, and to a lesser degree, the US, although it's certainly at play in the US as well, as very determined to prevent Iran from getting a bomb. And especially in the case of Israel, willing to accept a lot of risk, in order to try to stop it, right?

Also, I think, again, as we discussed earlier, I think it's fair to say that Israel had pretty incredible intelligence on Iran's nuclear program, right? In order to execute some of the operations that it's been able to execute over time. And so that's a really important tool, and I think that shows the value of that type of intelligence and the role that can play in informing policy. But how replicable is that in future cases? I'm not really sure.

And in terms of how potential future proliferators or countries, you know, who might want to hedge, or might want nuclear weapons might look at this, I think, again, you know, I'm not sure how much of this carries over. I think, you know, one thing that I've been thinking about lately is that there's not a lot of rogue states left, right? I mean, Iran is kind of this, you know, one of the few remaining countries that, you know, would've been put in that bin of so-called rogue states like North Korea, you know, Libya for a time, and Iraq for a time, and others.

And I think when we look at where do future nuclear proliferation risks reside, I think a lot about US allies and partners, right? There's a lot of discussion within South Korea about nuclear weapons options. There's been conversations by

leaders in Poland, certainly in Saudi Arabia as well. And so I do wonder how these countries may look to the Iran example.

And we don't know. But I think some might see the Iran case and say there's no utility in a threshold capability, or at least pursuing it overtly. So if I want a bomb, I need to do it all covertly. I need to "hide the program,"and just need to get it as quickly as I can.

I also think there's an argument that others might conclude that where Iran really erred, and where Iran made the biggest mistakes is, in being too aggressive and too overt about its hedging, right? It's going to 60%, and sort of waving its enrichment in the face of the international community. It's stonewalling the IAEA. And so perhaps the lesson for those countries, it's better to go for a friendlier type of proliferation, or a softer type of proliferation, where you develop enrichment and reprocessing, which again, are the kind of the two pathways to a bomb, but not do things like enrich to 60%, which is very close to weapons grade.

But I do think that, you know, I feel pretty confident that no country will come away from this and look at Iran and say, "That's the successful case of nuclear deterrence. That's what I want to try to reproduce," because the Iran case clearly was not.

Sheena Chestnut Greitens: We talk a lot at *TNSR* and just generally about how to learn from history, right? And, you know, there are books like *Thinking in Time* or Yuen Foong Khong's *Analogies at War,* that look at how people use historical examples and analogies to structure their decision-making and reasoning. And one of the things they all say is, it's really important not just to pay attention to the similarities, but to the differences.

So I really appreciate your answer in part because it gets at, you know, some possible lessons from the Iran case, but also some things that really might make that case different, and change whether certain lessons are applicable to one or another group of countries. So, yeah, I enjoyed that part of the reflection in the article as well.

Ryan Vest: Yeah, that was really great.

[00:35:55] Looking Back From 2026

Ryan Vest: So Eric, we're kind of at the back end of our time, so I just want to wrap this up with one last question, and I'm going to kind of put a little bit of a prologue on it.

At *TNSR*, we pride ourselves on the fact that we publish articles fairly quickly after we receive them, and by academic standards, we're very good, I think, tooting our own horn. But, you know, academic publishing with peer review and everything is a long process. And so I was just looking at my notes, and you initially submitted this article to us in November of 2025, so which is long before a lot of the most significant events that are going on right now, or that we're looking back on took place.

So viewing your article through the lens of the summer of 2026 and the US-Iran war, how do these arguments continue to hold up? Looking back at this year, we've got a lot of people looking at the limits of US power with Iran. You know, some people are arguing that Iran has won this war, that they've at least come away with it with the upper hand. Are recent events a reversal to what you argue, is a degradation of Iran's deterred architecture, or does this hold up and further your argument?

Eric Brewer: So it's a great question. In the piece, I talk about the importance of US and Israeli conventional dominance, and I think this was something that was recognized by Iran at the time. And I argue that this conventional dominance played an important role in enabling the US and Israel to credibly threaten to act against Iran's nuclear program and ultimately, you know, the regime. And that dominance and fear of US and Israeli escalation, in ways that could implicate core Iranian interests, I think explains a lot of the Iranian restraint in its retaliations over the time period of 2023 to early 2025. But also drove Iran to rely more and expand its nuclear program.

But I think a key reason that conventional military dominance worked in this case, or at least played out in the way that I just described, is because US and Israeli aims during that period were limited, hence Iran's concern about escalation in ways that could imperil the regime, was sort of forefront in its mind.

When you sort of start the war, start the conflict, as the US and Israel did, most recently in 2026, by sort of going in for the kill, right? By trying to remove the regime, and I would argue, that was the attempt–can debate how well considered that was or how, you know, whether it ever stood a chance of success–but I think that was the goal. But so when you go in, your aims now are unlimited, right? When you're trying to end the survival of the Islamic Republic.

And what I think we've seen in that conflict since, is that Iran responded accordingly. Iran was no longer restrained in how it responds, as it was in the period that I considered in this article. Iran didn't try to close the Strait of Hormuz or attack Gulf energy targets after the October 2024 Israeli attack, or other types of attacks, because it worried that the things that have happened since, like the June 2025 strikes on the nuclear program, or what happened in March would result, right? And so now that those things have already happened, I think Iran has less to fear. And so while I think, you know, I would still argue that the pillars of Iran's deterrent triad have eroded, I think its willingness to wield them in ways that can inflict more damage has changed.

I guess the last point I would add too, in sort of reflecting on this question, is I think a lot of what we're seeing now in the war really isn't about deterrence anymore, which is what I examined throughout the piece. It's more about compellence, both for the United States and Iran, and trying to compel the adversary into accepting your terms to end the conflict, and so it's a slightly different dynamic. I would note too that it's also very ironic that despite everything that has happened, the nuclear issue, you know, remains at the heart of trying to end this conflict, and is obviously sort of front and center US mind, and in the mind of all the parties, in figuring out how to end this, and how to secure our interests around the nuclear program.

So it's still there as an issue of concern, and it's probably going to be there for a while.

[00:40:37] Wrap Up and Credits

Ryan Vest: Well, Eric, it's been a lot of fun talking through these issues today and really digging into your article. Thanks for joining us on *Horns of a Dilemma* from the *Texas National Security Review*. Our guest today has been Eric Brewer, author of "What Good Is a Nuclear Threshold Capability? Lessons from Iran's Nuclear Program and Recent Regional Conflict," which, as always, can be accessed for free on our website. Eric, thank you very much for joining us today.

Eric Brewer: Thanks so much for having me. It's been a pleasure.

Ryan Vest: If you enjoyed this episode, be sure to subscribe and leave a review wherever you listen. We love hearing from you. You can find more of our work on [*TNSR*.org](TNSR.org). Today's episode was produced by *TNSR* Digital and Technical Manager Jordan Morning, and made possible by the *University of Texas System*. This is Ryan Vest and Sheena Chestnut Greitens.

Thanks for listening.