

2025

Iran and its way forward



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1. SUMMARY

The US has introduced an **unconventional way to force diplomatic contacts**. Its overwhelming capabilities have shown that power can be exercised in a controlled manner to produce desired effects.

Although it all **might derail in an instant**, the unexpected has been brought to reality and it seems it will hold. **Iran and Israel have listened to the US**, ears wide open. But it also sends a message to the international community, namely China and Russia, but the EU should also be aware.

2. ATTACK ON IRAN NUCLEAR FACILITIES

The aerial attack on the three nuclear facilities was extremely surgical. It happened when facilities were not occupied and after the Iranians had taken away the enriched Uranium (actually UF_6 , hexafluoride of uranium) from Fordow.

It has **minimised human losses and maximise the damage inflicted to the Iranian nuclear programme**. Let's not forget that before the attack Israel had also eliminated several key figures of the nuclear programme.

It doesn't mean that Iran is incapable of rebuilding again its nuclear programme because they already **have the knowledge, and the expertise** of enriching uranium and Iran has ways to get the material it needs to rebuild it.

In summer 2023, it was estimated that Iran might get the nuclear weapon in 335 days. That is the way intelligence agencies gauge the developments achieved by the Iranians in this field.

There are always stones in the way and **that figure is checked constantly** in order to keep Iran's pursued goal updated. Taking this into account, it is reasonable to believe that **Iran was close to get the weapon** at this moment. It is credible that **it underpinned Trump's decision to attack**. Iran was weak after days of aerial attacks from Israel and **Iran was closing in on its goal of becoming a nuclear power**.

The attack chose those facilities for a reason. **It involves the whole uranium enrichment cycle**.

Isfahan converts extracted uranium (yellow cake) into UF_6 . So, Isfahan is not an enrichment facility, but it is the very beginning of the process. After Isfahan, UF_6 is enriched in the first place in **Natanz**. It must be clear that enrichment below 20% (civilian use) is harder than enriching uranium from 60% to 90% (military use). Then low enriched uranium goes to **Fordow** to get to higher levels, all the way up to military use.

This is the reason Trump and his administration state that Iran's nuclear programme has been obliterated. Of course, this is an exaggeration.

Although Iran has been able to save over 400 kilograms of enriched uranium (allegedly around 60%) the destruction of those facilities will withhold production heavily. Centrifuges used to enrich are very sensible to vibrations. The blasts,

even if bombs didn't reach Fordow enrichment halls, have rendered those centrifuges **unfit for operation**.

Iran has spent years to gather all the material needed to build its nuclear programme. And it had to do it **under sanctions**. It has taken a lot of efforts and budget to reach this point.

Ideally, the process goes as follows:

Stage	Material	Approximate Mass Required
1	Yellowcake (U_3O_8)	250–300 kg
2	Natural UF_6 (0.7% U-235)	200–250 kg
3	Low Enriched Uranium UF_6 (~4.5%)	25 kg
4	Final Product (UF_6 , 90%)	1 kg

Assuming that Iran has 400 kilograms of enriched Uranium (60%) it would result in the production of **16 kilograms-30 kilograms of 90%-enriched uranium**. A Hiroshima nuclear device used 15~25 kilograms of enriched uranium.

Iran has its own uranium mines. It means that Iran can resume production as soon as the plants (the three of them) are fit for operation. But it will take time.

All of this suggests that **the attack was based on a strong rationale, was comprehensive yet limited, and aimed to minimise damage**.

It is also remarkable the Chinese and Russian silence regarding Iran. **No sign of support beyond words**.

3. CONSEQUENCES

Iran's regime is at one of its lowest valleys. Internally, propaganda is trying to show force and resilience against Israel and the US. It goes without saying that the way Iran retaliated against the US (Al Udeid base and Iraq base) **was a clear intent to deescalate**.

Warning Qatar and the US of the attack says it all. It's remarkable the weakness that Iran showed to its enemy without blushing. **The retaliation was only intended for internal propaganda**. But the theocratical regime will not forget.

If Israel keeps its horses in the stables, and Trump will do his best in this regard, Iran is due to sit at the negotiating table. At least, in the short run and to earn time, Iran is likely to negotiate new terms regarding its nuclear programme.

Internally, a **new wave of repression is awaited**. IRGC and Basij will keep a strong grip on the population. Iran is aware that Israel and the US wouldn't be sorry if an uprising took shape. Israel defends that it is the only way Iran will stop its nuclear (military) programme.

Repression will focus on identifying assets who cooperate with Israel and the West. It has been made clear that the Iranian nuclear programme is **deeply**

penetrated and the knowledge of Iranian military deployment (aerial defence for instance) that Israel enjoys is **profound and large**.

Assets coopted by the West and Israel would be wise if they left the country. However, it is right now when they are most needed. Times ahead are uncertain and access to key information is of the utmost importance.

Key elements will focus on the **likelihood of an uprising and the steps taken by the regime to resume its nuclear programme**. Iranian military sources will be key to assess the internal situation and scientists and entrepreneurs are key to assess the activity related to the nuclear programme. **Entrepreneurs (and front companies under the control of the IRGC) are key for the nuclear programme** because they are who procure the elements needed to refurbish the damaged nuclear facilities.

Iranian proxies should be worried because Iran is not in the mood of supporting them as it has been doing until now. **Houthis** have not conducted any operation to disrupt trade at the Red Sea, for instance. **Hamas** is in tatters and **Hezbollah** has recently suffered the greatest humiliation of its history (the attack on vipers).

The whole Iranian ecosystem has been greatly weakened in the last one and a half year. This is beneficial for the whole West. So, there should be room to negotiate something reasonable which is likely to last for some time, during which a change of regime might gain traction.

4. FINAL ASSESSMENT

A nuclear-armed Iran presented a strategic red line for both Israel and the United States, rendering the situation intractable through diplomatic means alone. According to Israeli views, Iran (the current regime) would use the nuclear weapon if needed. Israel, given its historical (and religious) background and its constraints (international relationships), is not so prone to make use of it.

Israel wants to promote a regime change as a reassurance for peace in the region and for its very existence. It would be the end of some terrorist groups and Iranian proxies. There will always be actions that disrupt life in the region, but a **regime change in Iran would be a real game changer** for the whole region, impacting China and Russia, too.

For a month or so, the heir to the Iranian throne, Reza Pahlavi, has been promoting himself in the US media as a mediator in the conflict. In fact, his mediation offerings were not realistic. So, **it was about promoting a choice different from the current regime in Iran**. Reza Pahlavi advocates for a **secular, democratic transition in Iran**. And that is exactly what Israel is longing for.