



CANADIAN GLOBAL AFFAIRS INSTITUTE
INSTITUT CANADIEN DES AFFAIRES MONDIALES

Joe Biden, the U.S. and the Challenges of Iran and North Korea

by Benjamin Hautecouverture
February 2021

POLICY PERSPECTIVE

JOE BIDEN, THE U.S. AND THE CHALLENGES OF IRAN AND NORTH KOREA

by Benjamin Hautecouverture

CGAI Fellow
February 2021



CANADIAN GLOBAL AFFAIRS INSTITUTE
INSTITUT CANADIEN DES AFFAIRES MONDIALES

Prepared for the Canadian Global Affairs Institute
1800, 150 – 9th Avenue S.W., Calgary, AB T2P 3H9
www.cgai.ca

©2021 Canadian Global Affairs Institute
ISBN: 978-1-77397-171-1



According to documents that then-president-elect Joe Biden published in November and December, Iran and North Korea would not be on the list of his administration's foreign policy and security priorities. During the post-election transition period, Biden's teams formulated four political priorities: fighting the COVID-19 pandemic, economic recovery, racial justice and climate change. Four foreign policy priorities appeared after the election: revitalizing key U.S. alliances, restoring American leadership on the international stage and in major international organizations, managing the strategic rivalry with China and managing the relationship with an aggressive Russia. Nuclear issues in the Middle East and northeast Asia would not be high on Biden's agenda. One might have thought the Iranian question would be the exception because of a growing nuclear risk and because as a regional issue, it indirectly affects other priorities: alliances, the international scene, Russia and China.

However, these two issues – both of them nuclear, ballistic and potentially explosive – imposed themselves on the presidential agenda as soon as Biden entered the White House. Tehran's and Pyongyang's behaviour had directly affected the new administration since November 2020.

In Iran's case, the exacerbation of tensions during 2020 – from the assassination of Gen. Qasem Soleimani in January to the assassination of Brig.-Gen. Mohsen Fakhrizadeh in November – reflects the reality of a regime under pressure since the return of American sanctions in August 2018. For 2020, the economy's recession should be around six per cent and inflation 26 per cent, according to the International Monetary Fund (IMF)¹, after a catastrophic 2019. Iran's failure since May 2019 to meet its obligations under the July 2015 Joint Comprehensive Plan of Action (JCPoA) is still part of a political dialogue.

Iran's recent intention² to install advanced centrifuge cascades at the Natanz uranium enrichment centre – prohibited by the 2015 agreement – indicate that Tehran is in a hurry to resume negotiations with the United States. The negotiations carried on with the rest of the parties to the 2015 agreement have never ceased. The ballistic missile program's acceleration has never been as significant since 2018, including in terms of medium and intermediate ranges (up to 4,000 km theoretical range for the SEJIL-3 under development), but also in terms of propellants and guidance systems. Now Iranian capabilities in terms of cruise missiles and UAVs also raise questions. As a candidate, Biden's program on Iran seemed to be very clear. Elaborating on it in a CNN op-ed on September 13, 2020, he claimed that former president Donald Trump's policy of maximum pressure on the Iranian nuclear program was a dismal failure. Indeed, it can be argued that such a strategy provided Iran with a new opportunity to resist an external enemy, which is what the regime has done its best to continue for 40 years.

Biden's program proposed preventing Iran from acquiring nuclear weapons and resuming the path of diplomacy once Iran again complies with its obligations under the JCPoA. The plan also would continue to work against the policy of regional destabilization that Tehran is pursuing, in

¹ World Economic Outlook Update, IMF, January 2021

² "Iran tells atomic watchdog it's adding more centrifuges at underground site", *The Times of Israel*, 4 December 2021



particular by maintaining targeted sanctions against support for terrorism, human rights violations and the Iranian ballistic program, and maintaining the option of military action if Iran decides to confront U.S. troops in the region.

Recently, Iran told the International Atomic Energy Agency (IAEA) that it has begun production of uranium metal to supply its research reactor in Tehran. The IAEA “proceeded on February 8 to verify 3.6 grams of uranium metal in the plant at Isfahan,” according to a statement transmitted to Agence France-Presse.³ The metallurgical process of turning uranium into fuel transforms the ore into uranium concentrate. It then converts the concentrate into gas – uranium hexafluoride (UF₆) – which is integrated in cascades of centrifuges to separate the heaviest molecules, U₂₃₈, from the lightest, U₂₃₅ – the fissile isotope of uranium – which a chain reaction can generate. The concentration of uranium 235 defines its enrichment; above 20 per cent, the use for such enrichment is military. The metallurgy of uranium is very complex. Iran informed the IAEA of this R&D activity in a letter on January 13⁴, warning of the modification and installation of equipment capable of such an activity in a plant at Isfahan. This triggered a warning from the United Kingdom, France and Germany, who reacted by recalling that according to the 2015 agreement, Iran may be authorized to begin its research on the production of uranium-based fuel “in small approved quantities” after 10 years, but only if the other signatories to the agreement authorize it.

This latest Iranian provocation is probably the riskiest. Iran announced on February 15, 2021 that if the other parties to the JCPoA did not fulfil their obligations under the agreement, Tehran would suspend its voluntary implementation of the additional protocol to its safeguards agreement with the IAEA.⁵ In doing so, the Rohani government claimed it would comply with a law passed by the predominantly conservative Iranian parliament at the beginning of last December. Iran thus risks a resolution by the IAEA’s board of governors and, possibly, referral of the Iranian nuclear file to the UN Security Council. This additional protocol in force at the Vienna agency since 1997, and now implemented by 136 states worldwide, allows IAEA inspectors to intrusively monitor Iran’s nuclear program. Aware of the potential seriousness of a new failure to comply with the 2015 pact’s obligations, Iran’s foreign ministry was careful to add: “It does not mean ending all inspections by the UN’s nuclear watchdog ... All these steps are reversible if the other party changes its path and honours its obligations.” Iran ended the implementation of the additional protocol on Tuesday February 23, rendering the IAEA partially blind to Iran’s nuclear programme. Admittedly, the “technical understanding” urgently concluded between the director of the Vienna Agency and the Iranian Atomic Energy Organisation on Sunday February 21 opens a three-month period to find a political agreement, but in the meantime, it is a new breach in compliance with the JCPoA.⁶

³ “Iran producing uranium metal, further violating 2015 deal: IAEA”, AFP, 11 February 2021

⁴ Statement by the IAEA : “Iran informed the Agency in a letter on 13 January that ‘modification and installation of the relevant equipment for the mentioned R&D activities have been already started.’” See “Iran advances research on uranium metal, a key component in nuclear weapons”, AFP, 14 January 2021

⁵ “We could restrict UN nuclear inspections, Iran warns West”, DW.COM, 15 February 2021

⁶ “Joint statement by the Vice-President of the Islamic Republic of Iran and Head of the AEIOI and the Director General of the IAEA”, IAEA, 21 February 2021



This umpteenth failure can be seen in two ways: If we look optimistically at the glass half full, it is a temporary solution ("up to 3 months"), which can press for a political agreement allowing a return to full compliance by Iran with its obligations under the JCPoA and a return to the voluntary application of the additional protocol. From this point of view, it can be seen as an arrangement proposed by the executive to ease the very severe measures taken by the Iranian Parliament last December, and thus a sign of independence, authority and good will towards the new administration in Washington. If one considers, on the contrary, that the glass is half empty, it is a new breach of significance, since all the recordings made on the sites where the agency's technical means are deployed can be erased by the Iranian authorities if they so decide. Secondly, it is a way of imposing a negotiating tempo on the Biden administration. Finally, it is a symbol. Threatening the integrity of the commitments under the additional protocol remains another thumb in the eye to the authority of the global nuclear non-proliferation regime, of which this instrument is an essential pillar.

By multiplying the breaches of their obligations under the JCPoA, the Iranians seek reciprocity; that is to say, a sense of urgency on the American side, so that the U.S.'s return to the agreement will take place as quickly as possible, accompanied naturally by the lifting of sanctions. The Iranians are betting that Western and Israeli perception will be of a narrowing of the "breakout time", i.e., the time Iran needs to accumulate enough fissile material for one nuclear warhead. The Israeli analysis and part of the American analysis indicate that the breakout time would now be 2.5 to 5 months, whereas the JCPoA guaranteed a respite of one year.⁷ It is significant that all the new officials of the Biden administration who spoke in January on the Iranian question insisted there is no urgency. However, such a stance is no longer tenable with the accelerated tempo Tehran has imposed. In Biden's program, point no. 2 ("Resuming the path of diplomacy once Iran returns to compliance with its obligations under the July 2015 nuclear agreement") poses a problem, i.e., the sequence of concessions by Tehran and Washington in the weeks ahead. In this sequencing, it is hoped that American and European negotiators do not confuse urgency with haste.

In North Korea's case, the military parade on October 10, 2020 to celebrate the 75th anniversary of the founding of the Workers' Party of Korea was the largest display of new military equipment ever seen in a parade in the history of North Korea. Numerous novelties were exhibited, such as a new anti-aircraft defence system and new tractor-erector-launchers (TEL), among others. In particular, a new intercontinental ballistic missile (ICBM) qualifying as a "monster" was mounted on an 11-axle tractor-erector-launcher (TEL). On the one hand, the new ICBM is probably intended to carry a more voluminous load than missiles of the same range already can carry: Hwasong-14, Hwasong-15, in particular. North Korea's next logical step is possibly the mastery of multiple-warhead technology against strategic defensive systems. On the other hand, if a national TEL production capacity is proven, then the number of ICBMs the country can produce will no

⁷ See Olli Heinonen, "Iran's Nuclear Breakout Time: A Fact Sheet," Belfer Center for Science and International Affairs, March 28, 2015.



longer be hampered by its limitations in acquiring TELs to launch them. In this case, the regime will soon be able to disperse an increased number of ICBMs in a crisis.

Symbolically, the parade marked the end of an open parenthesis with the bilateral North Korean-American summit in Singapore in June 2018. It is now clear that this event did not mark the beginning of a downturn in Pyongyang's ballistic and nuclear programs, but simply a pause in the programs' progress, which the regime undertook to capitalize on for further political and diplomatic gain while continuing to develop new devices. In this respect, the parade marked the total failure of the Trump administration's strategy towards the DPRK. North Korea's new missiles will need to be tested. Doubtless, this will end the moratorium Kim Jong-un agreed upon on long-range missile tests at the Singapore summit, even if the tests' scope were limited to 1,000 kilometres so as not to overfly Japan, as a sign of restraint, which is conceivable. North Korea's ballistics arsenal does not include any long-range missiles certified operational to date. Four long-range missiles can be listed: KN-08, KN-14, Hwasong-14 and Hwasong-15, to which the Hwsaong-16 will likely be added, although its features remain to be confirmed. All of these craft are considered to be still under development.

What options does Biden have? In theory, he has all of them; in practice, only a few. As vice-president, Biden was one of the architects of the policy of "strategic patience" that the Obama administration applied to North Korea after the failure of the leap-day agreement in February 2012 and adapted on Iran. The Trump administration's actions from 2018 onward do not permit proper assessment of the value of the Obama/Biden approach. However, the progress North Korea and Iran have made in the conduct of their programs since then suggests that a resumption of strategic patience would be inappropriate today.

What does Biden's first major foreign policy speech at the State Department on February 4 indicate in this regard?⁸ First, "America is back. Diplomacy is back at the centre of [U.S.] foreign policy." Second, nuclear proliferation is one of the first challenges Biden mentioned, along with climate change, China's ambitions and Russia's threat to democracy. That's all there is to it. Biden mentioned neither Iran nor North Korea. His silence of course, does not indicate that the White House, the State Department and the Pentagon are not concerned about these issues. Rather, it indicates that Biden cautiously refuses to cave to the pressure of current events in these two countries.

The Biden administration is returning to methodical diplomacy. Although this formal change will help to ease bilateral and regional tensions, it will not be enough. After the resounding failure of Trump's hazardous policy towards Iran and North Korea, the U.S.'s allies and adversaries expect it. The fundamental question that Biden must answer is about his strategic objective: Denuclearization of North Korea's security policy? Abandonment of Iran's uranium enrichment program? Limitation of both countries' ballistic programs to medium ranges? Fight against the two regimes' proliferating activities?

⁸ See "Remarks by President Biden on America's Place in the World, February 4, 2021," U.S. Department of State Headquarters, Washington, D.C.



The Americans have much narrower room to manoeuvre in the cases of both Iran and North Korea.

The foreseeable easing of economic pressure will not be enough for Iran to definitively abandon its nuclear program and suspend its ballistic missile program. The ambiguity maintained vis-à-vis the former and the determination put into the latter are the result of a strategic calculation the Iranian authorities made at least 20 years ago, independent of the political changes in Tehran. Tehran's failure to fulfil its obligations under the JCPoA since May 2019 raises the question: How quickly can a government, starting from a certain level of expertise and technology, develop a weapon? This question introduces the notion of nuclear latency.⁹ A virtual nuclear deterrent¹⁰ permitted by a nuclear latency deemed to be effective is indeed a form of deterrence in real terms, if not in doctrinal terms. The reasons why more so-called threshold strategies can be expected from emerging economies are varied. Some of them will be instruments for piloting new power postures. Seen from this angle, nuclear latency theoretically allows a state to avoid the effects of a deliberate exit from the global nuclear non-proliferation regime while enjoying certain privileges associated with the possession of nuclear weapons. If this is the Iranian calculation – a hypothesis that would need to be documented – then the U.S.'s position on settling this dispute is no longer the only determining variable.

The U.S. and its allies have failed to prevent North Korea from becoming a nuclear power. There remains little other objective than to come to terms with this state of affairs by limiting the offensive risk it poses: exercise of extended deterrence, possible agreement on limiting systems and ranges, and implementation and maintenance of strategic and theatre defensive systems. The public expression of this reality seems to contravene the official demands for the complete and verifiable denuclearization of North Korea, which the states involved in the resolution of this issue have made since the 1990s. This is also the official request made by all parties to the NPT as part of the review process of the treaty. However, containing, isolating and controlling North Korea's nuclear forces is not incompatible with the pursuit of denuclearization of the Korean peninsula. The truth is that sticking to the strategic objective of denuclearization has generated all the tactical defeats accumulated in this dossier for nearly 30 years. Protected by a strategic triangle of conflicted or competitive relations between Russia, China and the U.S., the North Korean regime knows how to escape the American stranglehold. But its nuclear policy is also in line with its desire for independence from China and its mistrust of the former Soviet ally.

The security risk associated with the strategic rise of both Iran and North Korea is partly linked to the historic relationship that the regimes in both countries have with the United States. A step backwards from them is always conceivable and certainly desirable. While waiting for a clear formulation of the new strategy in Washington, let us bear in mind that the American administration no longer holds the key.

⁹ See Scott D. Sagan, "Nuclear Latency and Nuclear Proliferation," in *Forecasting Nuclear Proliferation in the 21st Century*, (Redwood City, CA: Stanford University Press, July 2010): 80–101.

¹⁰ The notion of a virtual nuclear state was popularized in particular by then- IAEA director general Mohamed ElBaradei at the beginning of the 2000s to justify the opportunity of launching a new multinational approach to the fuel cycle.

► About the Author

***Benjamin Hautecouverture** is a historian, a political scientist and a senior research fellow at the Fondation pour la recherche stratégique (Paris, France). He is a senior fellow at the Canadian Global Affairs Institute, technical director at Expertise France, and one of the founders of the European Union Consortium on Non-Proliferation and Disarmament.*

► **Canadian Global Affairs Institute**

The Canadian Global Affairs Institute focuses on the entire range of Canada's international relations in all its forms including (in partnership with the University of Calgary's School of Public Policy), trade investment and international capacity building. Successor to the Canadian Defence and Foreign Affairs Institute (CDFAI, which was established in 2001), the Institute works to inform Canadians about the importance of having a respected and influential voice in those parts of the globe where Canada has significant interests due to trade and investment, origins of Canada's population, geographic security (and especially security of North America in conjunction with the United States), social development, or the peace and freedom of allied nations. The Institute aims to demonstrate to Canadians the importance of comprehensive foreign, defence and trade policies which both express our values and represent our interests.

The Institute was created to bridge the gap between what Canadians need to know about Canadian international activities and what they do know. Historically Canadians have tended to look abroad out of a search for markets because Canada depends heavily on foreign trade. In the modern post-Cold War world, however, global security and stability have become the bedrocks of global commerce and the free movement of people, goods and ideas across international boundaries. Canada has striven to open the world since the 1930s and was a driving factor behind the adoption of the main structures which underpin globalization such as the International Monetary Fund, the World Bank, the World Trade Organization and emerging free trade networks connecting dozens of international economies. The Canadian Global Affairs Institute recognizes Canada's contribution to a globalized world and aims to inform Canadians about Canada's role in that process and the connection between globalization and security.

In all its activities the Institute is a charitable, non-partisan, non-advocacy organization that provides a platform for a variety of viewpoints. It is supported financially by the contributions of individuals, foundations, and corporations. Conclusions or opinions expressed in Institute publications and programs are those of the author(s) and do not necessarily reflect the views of Institute staff, fellows, directors, advisors or any individuals or organizations that provide financial support to, or collaborate with, the Institute.