

INFER Issue Report

Iran's Progress Towards a Nuclear Weapon

January 2024

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Iran’s Progress Towards a Nuclear Weapon

Iran has been steadily building its nuclear weapons capability since 2019, when it first began ignoring limitations set under the JCPOA. This heatmap analyzes crowd forecasts from the signals below to show whether INFER’s forecasts indicate that momentum towards Iran building a nuclear weapon is increasing, decreasing, or staying the same across various indicators.

Decreasing Momentum Status Quo Increasing Momentum

| Drivers | Signals | | INFER Probability Forecast | | |
|---|--|--|----------------------------|--------|--------|
| | | | 30 Nov | 31 Dec | 31 Jan |
| Attacks on Nuclear or Military Facilities | Attack on an Iranian nuclear or missile facility in the next six months | | 10% | 11% | 13% |
| Coordination between Iran’s enemies and competitors | [NEW] Muslim-majority country normalizes relations with Israel in the next six months | | N/A | N/A | 1% |
| | Middle Eastern or North African country recognizes Israel’s statehood by 31 Dec 2024 | Saudi Arabia | 7% | 5% | 5% |
| | | Oman | 4% | 3% | 3% |
| | | Qatar | 3% | 2% | 2% |
| | | Kuwait | 3% | 2% | 2% |
| | | Tunisia | 2% | 2% | 2% |
| Military support from Russia and China | Russia delivers missile systems or fighter jets to Iran before 1 Feb 2025 | Su-35 | 18% | 21% | 15% |
| | | S-400 or S-500 | 9% | 8% | 8% |
| Leadership changes | Ali Khamenei flees Iran or ceases to be Supreme Leader before 1 Mar 2024 | | 1% | 1% | 1% |
| Nuclear development | IAEA discovers uranium enriched to 90% or more in Iran by 31 Dec 2024 | | 5% | 6% | 6% |
| | Iran eliminates, reduces, or grows its stockpile of uranium enriched up to 60% by 31 Dec 2024* | Eliminates | 0% | 0% | 0% |
| | | Reduces by 50%+ | 1% | 1% | 1% |
| | | Reduces by less than 50% or stays the same | 6% | 4% | 3% |
| | | Increases | 93% | 94% | 96% |
| International agreements and sanctions | JCPOA participant country begins the process of imposing “snapback” sanctions on Iran by 31 Dec 2024 | | 3% | 3% | 3% |
| | Iran announces it will leave the JCPOA before 1 Jan 2025 | | 8% | 7% | 5% |
| | Iran agrees to limit uranium enrichment to 5% or less in next six months | | 2% | 1% | 1% |
| Regional Conflict | [NEW] Iran goes to war with another country in the next year | | N/A | N/A | 12% |

* Low probability forecasts on this multi-choice question have differing implications for Iran’s progress towards a nuclear weapon depending on whether forecasters place a higher probability on Iran growing, shrinking, or keeping their stockpile the same.