



## Reflections on the National Intelligence Estimate on Iran

*In early December, sixteen U.S. intelligence agencies issued their latest National Intelligence Estimate (NIE). The report claims that Iran stopped work on its nuclear weapons program in 2003, a stark reversal of the conclusions of an NIE released in 2005. In the tumult that followed the release of the new report, four AEI scholars assessed its conclusions, the role of the intelligence community, and the effect the report will have on U.S. policy toward Iran at this critical point. Michael A. Ledeen expressed skepticism about the accuracy of the estimate, Michael Rubin said that recent history as well as reports from the International Atomic Energy Agency (IAEA) indicate that U.S. policymakers should not start trusting Iran, John R. Bolton questioned the intelligence community's motives in releasing the NIE, and David Frum explored the political consequences of the estimate.*

### I Am Not a Believer

By Michael A. Ledeen

Those lively minds over at the (always capitalized) Intelligence Community have given us yet another of their entertaining estimates, this time about the Iranian nuclear weapons program. You know, the one the Iranians stoutly deny exists, the one they refuse to let inspectors examine, and the one they sometimes acknowledge when one or another of their leaders has a slip of the tongue. The Intelligence Community now favors us with slightly more than two pages of “key judgments” on this important subject.

Two years ago, the Intelligence Community—the same group that claimed to have detailed information about Saddam Hussein’s weapons of mass destruction (WMD), that famously missed the boat on al Qaeda, and that has had at least two spy networks inside Iran rolled up in the past couple of decades—told us it was all but certain that Iran was “determined to develop nuclear weapons.” Yesterday, it reversed field. It said that,

in fact, two years before the 2005 report, Iran “halted its nuclear weapons program,” and it said that the “halt lasted at least several years” and (although the Intelligence Community is less certain about this) is still in force. There is some disagreement within the community on this point, however. The Energy Department and the National Intelligence Council apparently agree that something was stopped but have at least some doubt as to whether the “halt” encompasses Iran’s “entire nuclear weapons program.”

In short, some intelligence analysts think there is no covert nuclear arms program at all, while others are not so sure. In a moment of candor at a briefing on December 3, these gentlemen stressed that Iran has a “latent goal” to develop a nuclear weapon, that “gaps remain” in our information, and that Iran is “probably the hardest intelligence target there is.” And they warn us, in one of their key judgments, that the odds are that Iran will

develop nuclear weapons. Parse this: “only an Iranian political decision to abandon a nuclear weapons objective would plausibly keep Iran from eventually producing nuclear weapons—and such a decision is inherently reversible.” This seems to imply that the “halt” was a tactical move, not a strategic decision.

You certainly cannot criticize them for failing to cover their *derrières*. Nonetheless, despite the “gaps in intelligence,” and despite the Islamic Republic’s well-earned reputation for being one of the most deceptive on earth, the Intelligence Community goes right ahead and predicts that Iran is quite a long way away from being able to field nukes. The earliest possible—albeit “highly unlikely”—date at which Iran could produce enough highly enriched uranium for a weapon is late 2009, but it is more reasonable to look to the 2010–15 timeframe. Interestingly enough, this pretty much corresponds to the 2005 forecast, when they said that if Iran’s technical progress increased, they might have enough weapons-grade uranium “by the end of this decade.” And the Intelligence Community stresses that Iran has “the scientific, technical, and industrial capacity . . . to produce nuclear weapons if it decides to do so.

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All this deals with the Iranians’ ability to enrich uranium on their own. Of course, they could have obtained some from abroad, and the Intelligence Community admits that it cannot rule out the possibility that Iran has obtained an actual weapon “or enough fissile material for a weapon.”

More *derrière* protection, and there is still more. After all, the Iranians excel at deception, and we have been fooled about the nuclear programs of countries from the Soviet Union to India and Pakistan. Maybe we have been fooled again. The Intelligence Community does not think so, although, in its usual “on the one

hand, yes; on the other hand, maybe” routine, officials responded to the question in the December 3 press briefing by reassuring the press that “we gamed more than half a dozen such scenarios.” But analysts reached the conclusion that such a scenario was “plausible but not likely.”

Tom Joscelyn has wisely warned us to be skeptical about anything that comes from the Intelligence Community, and he rightly asks about the sources for the new conclusion. There is no point guessing about this, and without such knowledge it is very difficult to assess the quality of the analysis. But whatever the spooks think they know has to be evaluated in the light of common sense, the views of other countries, and the history of nuclear proliferation. WMD programs are easier to hide than one imagines. After the first Gulf War, we were astonished to discover how far Saddam’s Iraq had advanced, for example. To claim we “know” that Iran no longer has a covert nuclear weapons program is quite a statement. (Remember how we used to say that you cannot prove a negative? The Intelligence Community seems to know better.)

Moreover, there is the old smell test. We went from zero to bomb in four years leading up to Hiroshima and Nagasaki, at a time when nobody even knew if the thing was doable. On the Intelligence Community’s account, the Iranians have been at this since “at least the late 1980s.” (I actually think it did not get into gear until 1991, but let us not quibble.) During that time, almost everything was for sale (and Iran has lots of money), A. Q. Khan was running his bazaar, and Soviet nuclear physicists were hired by Tehran. And the Iranians themselves are very smart. Is it likely that Iran has not been able to build nukes in two decades? No way.

If this NIE is true, the evidence would have to be awfully good. And evidence of that quality has been in famously short supply. These are the same people who have been telling us for years that Sunnis and Shiites cannot work together, when they should have known that Iranian Revolutionary Guards (Shiites) were trained in the early 1970s by Yasser Arafat’s Fatah (Sunnis). Color me an unbeliever.

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# Iran's Nuke News Shows Danger of Trusting This Regime

By Michael Rubin

Congressional Democrats have seized upon the latest NIE—which says Iran stopped pursuing nuclear weapons in 2003—with great relish. They suggest it proves that not only did the Bush administration exaggerate the threat of a nuclear Iran, but that the White House, in its drive for hard-line sanctions backed by military force, has been far too skeptical of diplomacy.

In a statement issued on December 4, Senator Joseph Biden (D-Del.), chairman of the Senate Foreign Relations Committee, chastised President Bush, saying his “actions are doubly dangerous because they undercut the cooperation we need from other countries for dealing with the real problems Iran continues to pose.” But Biden and all those who echo his thinking are wrong. In reality, the NIE shows just how costly diplomacy can be when it is not reinforced by strong sanctions and the credible threat of military force.

The NIE timeline clearly describes the elaborate deception that occurred during the term of President Mahmoud Ahmadinejad's predecessor, Mohammad Khatami, when Iran tried to build a nuclear bomb. It proves Iran was cheating even as well-meaning American diplomats believed promises that it was cooperating with the international community.

On August 4, 1997, Khatami declared, “We are in favor of a dialogue between civilizations and a detente in our relations with the outside world.” European diplomats, American academics, and even then-secretary of state Madeleine Albright applauded him. European statesmen opened palaces to him, and the Iranian president became the toast of Rome, Paris, and London.

In fact, to encourage Khatami's promises of reform, the European Union nearly tripled its trade with Iran—and the Islamic Republic reaped a windfall. But rather than integrate itself into the family of nations, Khatami and the theocratic leadership he served invested the money in a covert quest for the bomb. The NIE proves once and for all that all of Khatami's talk of dialogue and reform was little more than a smoke screen.

And let us not forget: Biden and Senator Arlen Specter (R-Pa.) were the Iranian president's chief cheerleaders on Capitol Hill. They may have been well intentioned, but, by caring more about what the Iranian leadership said than what it actually did, they became useful idiots for the regime. Like their European counterparts, they trusted too much and verified too little.

IAEA reports confirm the depth of Iranian subterfuge. While Iranian leaders said their program was for peaceful uses, in 2003, inspectors found traces of uranium metal—an element important in nuclear weapons development but not in a civilian energy program—in their centrifuges. A year later, the IAEA found that Iran experimented with polonium-210, an element used to start the chain reaction leading to the detonation of a nuclear bomb.

Just last month, IAEA director general Mohamed ElBaradei revealed that Iran had a blueprint for a nuclear warhead provided by disgraced Pakistani nuclear scientist A. Q. Khan during a visit to Tehran in the 1990s. It is this episode more than any other that effectively renders the latest NIE moot. Sixteen U.S. intelligence agencies now assert Iran cannot build a bomb until at least 2010. But they all assume Tehran's program is indigenous. That is a dangerous assumption indeed.

While Iranian minders usher the IAEA through the regime's declared facilities, the Revolutionary Guard could simply buy nuclear fuel or components from rogue scientists in Russia, Pakistan, or Libya. The September 2007 revelation that North Korea likely supplied the Syrian government with a nuclear plant underlines this concern.

On December 4, Bush declared, “The NIE does not do anything to change my opinion about the danger Iran poses to the world—quite the contrary.” Other politicians should learn from their mistakes and not, as Biden and his colleagues now counsel, prepare to repeat them.

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# The Flaws in the Iran Report

By John R. Bolton

Rarely has a document from the supposedly hidden world of intelligence had such an impact as the NIE released in early December. Rarely has an administration been so unprepared for such an event. And rarely have vehement critics of the intelligence community on issues such as Iraq's WMDs reversed themselves so quickly.

All this shows that we have not only a problem interpreting what the mullahs in Tehran are up to, but also a more fundamental problem: too much of the intelligence community is engaging in policy formulation rather than intelligence analysis, and too many in Congress and the media are happy about it. President Bush may not be able to repair his Iran policy (which was not rigorous enough to begin with) in his last year, but he would leave a lasting legacy by returning the intelligence world to its proper function. Consider these flaws in the NIE's "key judgments," which were made public even though approximately 140 pages of analysis and reams of underlying intelligence remain classified.

First, the headline finding—that Iran halted its nuclear weapons program in 2003—is written in a way that guarantees the totality of the conclusions will be misread. In fact, there is little substantive difference between the conclusions of the 2005 NIE on Iran's nuclear capabilities and the 2007 NIE. Moreover, the distinction between "military" and "civilian" programs is highly artificial, since the enrichment of uranium, which all agree Iran is continuing, is critical to civilian and military uses. Indeed, it has always been Iran's civilian program that posed the main risk of a nuclear breakout.

The real differences between the NIEs are not in the hard data but in the psychological assessment of the mullahs' motives and objectives. The current NIE freely admits to having only moderate confidence that the suspension continues and says that there are significant gaps in our intelligence and that our analysts dissent from their initial judgment on suspension. This alone should give us considerable pause.

Second, the NIE is internally contradictory and insufficiently supported. It implies that Iran is susceptible to diplomatic persuasion and pressure, yet the only events in 2003 that might have affected Iran were our invasion of Iraq and the overthrow of Saddam Hussein, not

exactly a diplomatic *pas de deux*. As under secretary of state for arms control in 2003, I know we were nowhere near exerting any significant diplomatic pressure on Iran.

Nowhere does the NIE explain its logic on this critical point. Moreover, the risks and returns of pursuing a diplomatic strategy are policy calculations, not intelligence judgments. The very public rollout in the NIE of a diplomatic strategy exposes the biases at work behind the Potemkin village of "intelligence."

Third, the risks of disinformation by Iran are real. We have lost many fruitful sources inside Iraq in recent years because of increased security and intelligence tradecraft by Iran. The sudden appearance of new sources should be taken with more than a little skepticism. In a background briefing, intelligence officials said they had concluded it was "possible" but not "likely" that the new information they were relying on was deception.

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These are hardly hard scientific conclusions. One contrary opinion came from—of all places—an unnamed IAEA official, quoted in the *New York Times*, saying that "we are more skeptical. We do not buy the American analysis 100 percent. We are not that generous with Iran." When the IAEA is tougher than our analysts, you can bet the farm that someone is pursuing a policy agenda.

Fourth, the NIE suffers from a common problem in government: the overvaluation of the most recent piece of data. In the bureaucracy, where access to information is a source of rank and prestige, ramming home policy changes with the latest hot tidbit is commonplace and very deleterious. It is a rare piece of intelligence that is so important it can conclusively or even significantly alter the body of already known information. Yet the

bias toward the new appears to have exerted a disproportionate effect on intelligence analysis.

Fifth, many involved in drafting and approving the NIE were not intelligence professionals but refugees from the State Department, brought into the new central bureaucracy of the director of national intelligence. These officials had relatively benign views of Iran's nuclear intentions five and six years ago; now they are writing those views as if they were received wisdom from on high. In fact, these are precisely the policy biases they had before recycled as "intelligence judgments."

That such a flawed product could emerge after a drawn out bureaucratic struggle is extremely troubling. While the president and others argue that we need to maintain pressure on Iran, this "intelligence" torpedo has all but sunk those efforts, inadequate as they were. Ironically, the NIE opens the way for Iran to achieve its military nuclear ambitions in an essentially unmolested fashion, to the detriment of us all.

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## No Nukes, No War

By David Frum

America's new intelligence estimate on Iran changes nothing—and it changes everything. Last week, the Bush administration released large portions of its NIE on the Iranian nuclear program. The NIE concluded that Iran had shut down its nuclear weapons program in 2003. It cautioned that there remained much to worry about. Iran could revive its weapons program at any time, and it continues to enrich uranium to levels that could serve as the fuel for a nuclear weapon.

Still, the NIE went far to lift the mood of imminent threat. The Iranian nuclear problem remains a huge problem—but maybe not an urgent problem.

Some have questioned the value of the NIE. No question, intelligence is a very imperfect art. Intelligence agencies often have institutional biases. The CIA in particular has been waging a long-term insurgency against the Bush administration through damaging leaks.

But an NIE is not a CIA product. An NIE represents the consensus view of the sixteen U.S. national intelligence agencies, including the Defense Intelligence Agency and the high-tech listening specialists at the National Security Agency. This particular NIE seems to owe a great deal to information provided by Ali Reza Asghari, the Iranian deputy minister of defense who defected to the United States in February 2007. It would be very unwise and irresponsible to mark the NIE down

as the work of disgruntled internal political opponents in the bureaucracy.

The NIE is a foundational political fact that will make it politically impossible for the Bush administration to launch a strike at Iran's nuclear facilities. Now in one sense, this changes nothing. Hype aside (and as I have been writing for eighteen months) the Bush administration has never had any real intention of striking the Iranian nuclear facilities. The new intelligence estimate makes it politically impossible to do something that was not going to happen anyway.

Yet the estimate also changes everything. So long as the world believed that the Bush administration might strike Iran, nobody attached much weight to the administration's utter lack of nonmilitary policies toward the Islamic Republic. But with force off the table, suddenly the world is noticing that nothing much else is on the table.

Into the void have rushed a thousand policy suggestions. But few of these suggestions begin with a clear view of what the West needs to accomplish in Iran.

The problem in Iran is not the regime's weaponry; it is the regime itself. Even without nuclear weapons, Iran supports terrorism worldwide. Between 1992 and 1996, Iran embarked on a terrorist rampage, carrying out attacks that killed some two hundred people in Argentina, Germany, and a U.S. base in Saudi Arabia,

among other targets. The terror campaign temporarily subsided after 1996 only to resume in 2001, this time targeting first Israel and then Iraq and Afghanistan.

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The idea that there is some kind of deal to be made with this regime is highly unrealistic. The Western goal, rather, should be to drive a wedge between the regime and its disaffected population—in the way that the Reagan administration worked to isolate and discredit Eastern European communist regimes in the 1980s. That means reassuring the Iranian population that the United States intends no violence against them—while maintaining economic pressure against the regime and supporting dissident broadcasting and political movements.

Despite rising oil prices, the Iranian regime is in terrible economic shape. (That may be one reason it suspended its costly nuclear program.) Wages are stagnant, inflation is worsening, unemployment is high, gasoline is in short supply. Foreign investors shun Iran not only because of economic sanctions, but also because the country offers a dangerous and unpredictable business environment.

With oil at \$100 a barrel, the regime can probably afford to buy enough support to survive. But as it becomes clear that Washington is not planning to attack Iran, that price should decline—as oil prices always do when threat of war subsides. At \$60, \$50, \$40, \$30, the regime becomes steadily less durable; the population increasingly impatient; and the chances for change increasingly promising.

Change should be the goal of U.S. policy. Economic pressure and communications operations should be the methods. A “grand bargain” is the dead end to avoid. And war should be seen as what it always is: a sign of policy failure, rather than a tactic to be used for failure to imagine anything better.

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