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ANALYSIS

# A New Arms Race?

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## Abstract

Between the 1970s and the 1990s, the US and Russia signed a steady stream of nuclear arms control agreements. Such cooperation subsequently became more contentious, culminating in the recent expiration of the New START arms control treaty. Amid the nuclear saber-rattling that has accompanied Russia's full-scale invasion of Ukraine, this article notes that fear of nuclear escalation has shaped the behavior of both sides, limiting the Western response while preventing Putin from openly striking Ukrainian supply lines in Poland. Looking forward, Europe is expected to take primary responsibility for managing the threat from Russia while the US turns its attention to China—with Donald Trump ultimately more likely to sign bilateral arms control agreements with both than to achieve his desired three-way deal.

On February 5, 2026, the New START arms control treaty was allowed to expire. For the first time since the end of the Cold War, there is no nuclear arms control agreement in place between the United States and Russia.

Thomas DiNanno, the U.S. undersecretary of state for arms control, gave a speech in Geneva on February 6 announcing "the end of an era, the era of U.S. unilateral restraint" in arms control (DiNanno 2026). DiNanno explained that "the most glaring shortfall in the New Start model" was its failure to prevent Russia from modernizing its nuclear weapons. He further argued that the increase in China's nuclear arsenal meant that a new arms control regime that would include all three leading nuclear powers was required.

As a result of the expiry of New START, the *Bulletin of the Atomic Scientists* (2026) moved their Doomsday Clock to 85 seconds to midnight, the closest to disaster since it was introduced in 1947. This movement of the clock reflected not just the lapsing of New START, but also the risks of war over Iran's nuclear program and lingering tensions between nuclear powers India and Pakistan.

The Federation of American Scientists (2025) estimates the nuclear arsenal of the US at 5,177 warheads, Russia 5,459, and China 600. The nine states with nuclear weapons together possess over 12,000 nuclear warheads, down from a peak of 70,000 in 1991.

## Back to the Future

In the 1970s, the US and USSR concluded a number of landmark treaties that slowed the nuclear arms race. These included the 1972 Anti-Ballistic Missile Treaty, which severely limited the deployment of systems to shoot down incoming intercontinental missiles. This was essential to preserving mutually assured destruction, the key to nuclear deterrence.

The winding down of the Cold War was signaled by the 1987 Intermediate Nuclear Forces treaty between the US and USSR, which banned missiles with a range of 500–5,500 kilometers and led to the dismantling of 2,600 missiles (Woolf 2023). The treaty included a provision for on-site inspection to ensure compliance. The 1991 Strategic Arms Reduction Treaty, START I, limited the U.S. and Russian strategic nuclear forces to 1,600 delivery systems and 6,000 warheads each. It included an inspections regime with data sharing, regular inspections of each other's sites, and even notifications each time they moved a nuclear weapon. In 1992, Russia and the US negotiated the Open Skies Treaty, which allowed signatories to conduct surveillance flights (which provide more data than satellites) over each other's territory on short notice. The treaty came into effect in 2002.

In 1993, the two sides negotiated the START II treaty banning multiple warheads on intercontinental missiles. However, ratification was delayed and the treaty never went into effect because Russia made it conditional on maintaining the ABM treaty. The US withdrew from the ABM treaty in 2002, citing concerns over a possible missile launch by a rogue state such as North Korea or Iran. In 2007, Russia suspended its participation in the 1990 Conventional Forces in Europe Treaty, which set limits on force deployments, before fully withdrawing in 2015.

In place of START II, a new Strategic Offensive Reductions Treaty (SORT) was signed in 2002, limiting both sides to 1,700–2,200 deployed warheads. In 2011, this was replaced by the New START treaty, which restricted the US and Russia to 1,550 nuclear warheads deployed in delivery systems and provided for 18 on-site inspections each year (Arbatov 2024).

Over the years, both Russia and the US accused each other of having violated these arms control treaties. Russia objected to U.S. plans to deploy anti-ballistic missile systems in East Europe, while the US said Russia was developing missiles that were banned under the

INF treaty. As a result, the INF Treaty was allowed to expire in 2019 (Gordon 2019). In 2020, Trump withdrew the US from the Open Skies Treaty; Russia followed suit in 2021 (Gordon 2020). One of the few agreements still in force is the 1967 treaty banning nuclear weapons in outer space.

On-site inspections of nuclear weapons stopped in March 2020 due to the Covid-19 pandemic, but New START was extended for five years in January 2021. In August 2022, Russia refused to allow the resumption of on-site inspections, and amid mutual recriminations in February 2023 Putin announced that he was suspending participation in the treaty while continuing to observe the numerical limits (Williams 2023).

## Nuclear Weapons and the War in Ukraine

The primary purpose of nuclear weapons is to deter an attack on one's country by another power. This has worked: there have been no major wars between nuclear states (though India and Pakistan did fight a brief conventional war in 1999). No nuclear weapons have been used since 1945—the so-called "nuclear taboo" (Tannenwald 2007).

Russia's full-scale invasion of Ukraine in February 2022 was accompanied by an alarming increase in nuclear saber-rattling by the Kremlin (Rutland 2023). From the outset of the war, Russian leaders repeatedly reminded NATO that they were ready to be the first country to use nuclear weapons if they perceived an "existential threat" to Russia. (What they would consider an "existential threat" was left deliberately vague.) In June 2020, the Kremlin released a document spelling out the conditions under which Russia would use nuclear weapons. These included "the case of aggression against the Russian Federation with the use of conventional weapons, when the very existence of the state is put under threat" (MFA 2020). A revised version of the doctrine in 2024 provided some more specifics, including a conventional attack by a country with the support of a nuclear power (MFA 2024).

Putin was using nuclear weapons not just to deter an attack by the US, but also to coerce the Western powers into staying out of the war in Ukraine (Sinovets & Alkış 2025). Such views have some support in Russian public opinion: one 2023 survey found that 29 percent of respondents believed that Russian use of nuclear weapons would be justified. Another survey reported that 55 percent of Germans believed that Vladimir Putin might use nuclear weapons against Ukraine (Re:Russia 2023). In June 2023, Putin demonstratively deployed tactical nuclear weapons to Belarus.

This strategy of nuclear compellence worked—to a degree. Fear of nuclear escalation meant the US and its NATO allies declined to commit their own militaries to fight in Ukraine and initially put limits on the types of weapons sent to Kyiv. However, fear of retaliation also prevented Putin from openly striking the supply lines that were bringing arms into Ukraine via Poland, a NATO member. Russia did, however, mount some sabotage operations in Poland and elsewhere in Europe (Jones 2025).

## The Trump Factor

When Donald Trump came into office in 2017, he signaled that he was unhappy with the New START treaty, which had been negotiated by President Barack Obama (Gottemoeller 2020). But Trump did continue another of Obama's policies: the modernization of the U.S. nuclear arsenal, a project that will cost over $1 trillion, with $90 billion to be spent in 2026 (Congressional Budget Office 2025). Trump has expressed interest in a "Golden Dome," modeled after Israel's "Iron Dome," that would offer the US protection from a ballistic missile attack.

In October 2025, Trump ordered the Pentagon to resume nuclear testing (though what exactly that entails remains unclear). The US never ratified the 1996 Comprehensive Nuclear-Test-Ban Treaty, but it had not conducted a test explosion of a nuclear weapon since 1992. The 1970 Non-Proliferation Treaty, which commits the nuclear powers to prevent the spread of nuclear weapons and promote disarmament, is still in force. But Russia has abandoned any effort to block North Korea's nuclear program and is actively helping its weapons development, though the extent of this assistance is unclear.

The US now sees China—whose nuclear arsenal is expected to grow from 600 to 1,000 by 2030—as its main adversary. The *National Defense Strategy 2026* describes Russia as a "persistent but manageable threat" (Defense Department 2026). Primary responsibility for managing the Russia threat will rest with the European members of NATO, while the US focuses on containing Chinese expansion in the Indo-Pacific. Secretary of State Marco Rubio said on February 4, 2026, "It's impossible to do something that doesn't include China because of their vast and rapidly growing stockpile" (Ewing 2026). The U.S. position is that any new arms control deal must include Russia and China, something that is not appealing to either Moscow or Beijing.

New START expired on February 6, 2026. In September 2025, Putin had proposed extending the treaty for a year while a new deal was negotiated. But the US was not interested. Trump said, "If it expires, it expires" (Sanger 2026). Harvard's Ulrich Kuhn noted "the relative silence from Washington's lawmakers on New START's demise" (Belfer Center 2026). To a large extent, public debates over the fear of nukes have been overtaken by the rapid changes in information warfare,

cyberwar, AI, and drones, along with anxiety over climate change.

On February 5, the U.S. European Command announced the resumption of military-to-military dialogue with Russia, even absent a mutual treaty. One of the main benefits of arms control treaties was the exchange of data and notifications of exercises, which helped limit the chances of misperception and an accidental escalatory spiral (Korb & Cimballa 2026). The resumption of some routine military-military ties is therefore to be welcomed.

## An Uncertain Future

It is not clear what happens next. Some analysts fear a runaway three-way nuclear arms race between Russia, China and the US. For example, the US is talking about returning reserve warheads to missiles, bringing the total to 3,500. Others contend that both the US and Russia had already been modernizing their weapons outside of New START and that the basic architecture of mutual deterrence is still in place (Kofman 2026). Matthew Bunn argues that Putin "wants to focus on conventional weapons, and that makes an unrestrained nuclear competition a bad idea for him" (Bunn 2026).

Fully occupied manufacturing drones and missiles to batter Ukraine, Russia cannot really spare the resources to manufacture and deploy new weapons such as the Sarmat heavy ICBM, the Poseidon intercontinental nuclear torpedo, the Burevestnik nuclear-powered cruise missile, Borei class submarines with Bulava missiles, and the Avangard hypersonic glide missile (capable of traveling at Mach 20). These systems seem to face serious reliability problems that are hindering their deployment.

But with its conventional military forces stalemated in Ukraine, and facing a stagnant economy, Putin's quest to regain great power status will continue to rely on invocation of Russia's nuclear arsenal. Concerned by steady improvements in the U.S. capacity for missile defense, long-range precision strikes, and theater-range deployments in Europe (Wachs 2025; Podvig 2026), Russia regards these new weapons as asymmetric hedges against future technological breakthroughs that could erode Russia's second-strike capacity.

It remains unclear whether the Trump Administration will be able to persuade Moscow and Beijing to engage in three-way arms control talks. For all the talk of strategic partnership, the cooperation between Russia and China is pragmatic and transactional (Aleksashenko 2026). It is therefore more likely that Trump will ultimately pursue separate, bilateral deals with Russia and China.

*About the Author*

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