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THE END OF US-RUSSIA ARMS CONTROL AND ITS GLOBAL RIPPLE EFFECTS

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Introduction

The expiry of New Strategic Arms Reduction Treaty (START) on 5 February 2026 removed the last legally binding cap on the strategic nuclear forces of the United States and Russia, the two states that still possess the overwhelming majority of the world's nuclear weapons.[1] With that legal endpoint, a half-century tradition of treaty-based predictability in the superpowers' nuclear competition gave way to a looser, more politically contingent form of restraint: one in which any limits depend on unilateral decisions, informal understandings, and technical intelligence rather than enforceable obligations and routine verification.

Arms control treaties have historically served as infrastructure: they create red baselines, reduce worst-case assumptions, and provide mechanisms to prevent fear from driving procurement and escalation.[2] When that infrastructure disappears, 'nuclear risk' becomes less visible but more embedded in ordinary political and economic life. Budget priorities shift; alliance debates sharpen; crisis signalling becomes harder to interpret; and the line between conventional and nuclear

capabilities blur in ways that can compress decision time during shocks. In this environment, the public does not experience nuclear danger as a single event. Instead, it is lived as a pattern of costs, anxieties, and strategic choices, especially in the most exposed theatres in Europe and Asia.[3]

New START's expiration should be understood as the culmination of a longer dismantling of restraint and as a pivot into a nuclear order that is less predictable, more crowded, and more shaped by technological interaction than by bilateral counting rules. The immediate result is not necessarily a sudden surge in deployed warheads but a decline in transparency and an intensification of hedging behaviour that can gradually normalise an arms race. The downstream effects are political: they influence alliance cohesion, the legitimacy of nuclear non-proliferation, and domestic narratives about security and status. The result is an era in which citizens are often implicitly asked to tolerate a higher baseline of nuclear risk in exchange for contested promises of deterrence.[4]

This paper argues that the end of US-Russia arms control is not simply the disappearance of one treaty, but the erosion of a wider architecture of predictability that once stabilised the nuclear order. Its most important consequence is not an immediate quantitative arms race, but the gradual normalisation of mistrust, hedging, and strategic opacity. These changes ripple outward by weakening alliance confidence, eroding the legitimacy of non-proliferation, and encouraging a more permissive environment for nuclear competition across multiple regions.

From Cold War Restraint to Erosion

The collapse of arms control should not be understood as a series of isolated treaty failures. Rather, it represents the progressive dismantling of the institutional habits that made nuclear competition legible and therefore more manageable. Strategic arms control did not emerge from trust. It emerged from the recognition, after the Cuban Missile Crisis, that rivalry between nuclear superpowers required rules of the road. The essential purpose of these agreements was mutual restraint backed by verification and predictability: treaties created shared ceilings, stabilising information flows, and procedures for confirming compliance that reduced incentives to plan for worst-case 'breakouts.'[5] New START, which entered into force on 5 February 2011, embodied this

logic by limiting deployed strategic warheads and delivery systems while providing for data exchanges and on-site inspections under negotiated rules.[6]

Over time, however, the treaty web that once supported predictability thinned. The United States' withdrawal from the Anti-Ballistic Missile (ABM) Treaty took effect in June 2002, reflecting a strategic choice to prioritise missile defence options over the constraints of a Cold War framework.[7] In August 2019, the United States formally withdrew from the Intermediate-Range Nuclear Forces (INF) Treaty amid mutual accusations of non-compliance and arguments in Washington that the framework no longer reflected the wider missile environment, especially with respect to China.[8] In November 2020, the United States completed its withdrawal from the Open Skies Treaty, and Russia's withdrawal took effect in December 2021, reinforcing the broader degradation of cooperative transparency measures in Europe's security architecture.[9] Russia's formal withdrawal from the Conventional Armed Forces in Europe (CFE) Treaty in 2023 further signalled the collapse of post-Cold War constraints on conventional force posture in the European theatre.[10] Taken together, these withdrawals were not merely discrete legal events; they marked the steady erosion of an architecture of restraint that had long reduced uncertainty through negotiated limits and cooperative transparency.

Even before expiration, New START itself was already hollowed out. The United States and Russia mutually paused on-site inspections at the start of the COVID-19 pandemic in March 2020, but attempts to resume them later became entangled in the broader collapse of political relations, including disputes on reciprocity and access under wartime conditions.[11] In February 2023, Vladimir Putin announced that Russia would suspend its participation in New START, an act that, whatever the legal arguments, had the practical consequence of making verification and institutional dialogue far harder to sustain.[12] By the time the treaty expired, the most stabilising material benefits of arms control, routine data exchange, inspection rights, and consultative problem-solving, had already been severely weakened.[13]

The importance of this cumulative erosion lies less in the symbolism of a 'last treaty standing' than in what was lost across these withdrawals: a shared strategic grammar. Arms control did not simply cap weapons; it created routines of contact, verification,

and mutual expectation that made rivalry more intelligible and therefore more manageable. When those routines weaken, ambiguity is more easily interpreted as a threat, and strategic planning increasingly shifts toward worst-case assumptions rather than agreed limits. Over time, such assumptions can harden into procurement choices and posture adjustments that become self-fulfilling, independent of leaders' original intentions.[14]

Why New START Ended

New START ended not simply because its expiry date arrived, but because the political conditions required for renewed arms control had already deteriorated beyond repair. The agreement was set to last ten years, with the possibility of a single extension of up to five years. The United States and Russia used that extension in February 2021, fixing 5 February 2026 as the treaty's endpoint unless a successor agreement could be negotiated and brought into force.[15] In practical terms, therefore, the question in the mid-2020s was not whether New START would end in 2026, but whether political conditions would permit a replacement framework in time to prevent a legal vacuum.[16] A successor to new START was not negotiated, and the reasons were primarily political. Russia's 2023 suspension of participation widened the trust deficit and undermined the foundation for any follow-on treaty: verification became a point of contention rather than a shared interest.[17] The United States publicly judged Russia to be in non-compliance with verification-related obligations, arguing that inspection denial prevented confidence in Russia's continued adherence to the treaty's limits.[18] Washington also adopted countermeasures, including changes to notifications and data-sharing that had previously been routine under the treaty regime, further reducing mutual visibility even before formal expiry.[19]

As the expiration approached, Russia sought to shape the post-treaty landscape through political signalling. In September 2025, President Putin stated that Russia would be willing to continue observing New START's central numerical limits for one additional year, provided the United States reciprocated.[20] This proposal was echoed in later commentary by Russian officials and was widely interpreted as an attempt to portray Russia as favouring predictability while placing the onus on Washington to respond.[21] Yet the political value of such a proposal depends on reciprocity: without

an agreed, verifiable arrangement, unilateral restraint can be reversed quickly and provides little reassurance to allies and other states.[22] What matters here is that the failure to replace New START was not primarily technical. It reflected a deeper collapse of political trust and a growing preference in both capitals for flexibility, signalling, and freedom of action over negotiated predictability.

The United States' domestic and strategic context also disincentivised a narrow bilateral 'rollover'. Strategic debates in Washington increasingly revolve around the prospect of facing two nuclear peer competitors, Russia and China, in the 2030s. The 2023 report of the congressionally mandated Congressional Commission on the Strategic Posture of the United States framed the United States as nearing an unprecedented situation of having 'two nuclear peer adversaries,' encouraging arguments for flexibility, hedging capacity, and expanded industrial readiness.[23] In that political environment, binding limits that constrain U.S. force planning, especially if they do not include China, risk being characterised as strategically naïve or as negotiating away leverage.[24]

New START ended, then, because it became politically easier to accept the risks of a treaty vacuum than to bear the domestic and diplomatic costs of compromise. The larger lesson is that arms control survives not when it is technically feasible, but when leaders judge predictability to be more valuable than strategic freedom of action.[25]

Immediate Strategic Consequences

The most immediate consequence of New START's expiry is not necessarily a dramatic numerical arms race, but the onset of a more opaque and bureaucratically normalised form of competition. With New START gone, there are no longer treaty-based ceilings on U.S. and Russian deployed strategic warheads or launchers, nor any legally required data exchanges or inspection rights. For the first time since the early 1970s, the United States and Russia operate without enforceable bilateral limits on their strategic nuclear forces.[26] Intelligence capabilities, satellites and other national technical means continue to provide important information, but they do not replicate the legally guaranteed, granular transparency that inspections, notifications, and shared counting rules created.[27]

The likely near-term behaviour of both states is best understood as ‘latent competition’. Most serious analyses anticipate that neither side will immediately surge far beyond familiar ceilings, because deploying additional warheads and delivery systems is expensive, operationally complex, and constrained by existing modernisation schedules.[28] Yet the removal of legal constraints changes bureaucratic incentives. In an unconstrained environment, defence planners can more credibly argue that they must hedge against the other side’s potential breakout. Those arguments can drive procurement and ‘uploading’ decisions, adding warheads to existing delivery systems, while remaining largely invisible to the public until costs appear in budgets or basing controversies.[29]

Budgetary pressures are not hypothetical. The Congressional Budget office projected in 2025 that U.S. plans to operate, sustain, and modernise nuclear forces over 2025-2034 would cost roughly $946 billion, reflecting the scale of long-term investment already baked into force renewal programs.[30] In a politically unbounded environment, where adversary behaviour can be interpreted as justification for expansion, such figures can grow and become harder to contest domestically, particularly when framed as necessary for a ‘two-peer’ nuclear challenge.[31] This is one of the principal ways ordinary citizens experience arms competition: through opportunity costs (what states do not fund), industrial mobilisation, and pressure on alliances to contribute more to deterrence.[32]

In other words, the danger of the post-treaty setting lies not only in what states deploy immediately, but in how the absence of limits gradually legitimises larger budgets, greater upload potential, and more expansive deterrence planning. At the same time, strategic uncertainty is destabilising in its own right. Arms control’s stabilising effect is not reducible to numbers alone; it comes from shared expectations. When those expectations erode, crises are more likely to be interpreted through anxiety rather than evidence. As RAND has argued, even if the end of New START does not trigger an immediate arms race, it can still make the strategic setting more dangerous by weakening transparency and institutionalised dialogue, precisely the mechanisms that help manage misperception under stress.[33]

It is therefore important to distinguish between two different dangers. The first is a deliberate arms race: a conscious decision to expand deployed numbers. The second is a slower competition driven by mistrust, verification loss, and bureaucratic hedging that gradually increases capability and alert reliance without a single 'starting gun.' This second dynamic is less visible but may prove more durable because it becomes embedded in budgets, procurement cycles, and force plans.[34]

Regional Implications in Europe and Asia

The global ripple effects of US-Russia arms control collapse are not uniform; they are mediated through regional alliance structures, local deterrence dynamics, and the wider credibility of nuclear restraint. The end of New START reverberates most sharply in regions where deterrence commitments and escalation risks are already politically contested. In Europe, the problem is not simply that the United States and Russia hold large arsenals. It is that a significant portion of NATO's security posture is built on extended deterrence and on assumptions about escalation control in a theatre that has already been destabilised by Russia's war against Ukraine.[35] The historical erosion of INF, Open Skies, and CFE constraints has already reduced theatre-level confidence-building measures. New START's verification regime, even weakened before 2026, still functioned as a strategic backstop: it constrained the highest-end strategic competition that shapes European security perceptions.[36]

Europe is also directly implicated through forward deployment arrangements. Open-source assessments and specialist organisations estimate that the United States stores roughly 100 nuclear gravity bombs across several NATO states under nuclear arms sharing arrangements, supported by dual-capable aircraft and allied infrastructure.[37] These deployments are politically sensitive because they embed nuclear deterrence in peacetime basing and alliance cohesion. In a post-New START world, where Russian capabilities are less transparent and where the meaning of strategic signals is harder to interpret, national debates within allies about basing, readiness, and nuclear roles can intensify.[38] Europe thus experiences the end of New START chiefly as a problem of alliance reassurance and escalation management.

In Asia, the collapse of bilateral U.S.-Russia restraint interacts with a rapidly changing multipolar nuclear environment. The Stockholm International Peace Research Institute (SIPRI) warned in its 2025 assessment that the era of reductions appears to have ended and that a ‘qualitative’ arms race is emerging in which competition extends across cyberspace, outer space, and other technological domains, areas that traditional counting treaties do not easily govern.[39] SIPRI’s 2025 estimates also put the global stockpile at roughly 12,241 nuclear weapons, with thousands operationally available and around 2,100 on high alert, an empirical reminder that nuclear danger persists not only in abstract doctrine but also in ongoing force posture practices.[40]

China’s nuclear expansion sits at the centre of Asian strategic debate. U.S. defence assessments, reported and analysed by specialist arms control organisations, have long projected significant growth in Chinese warhead numbers by 2030, and this prospect has become a central driver of U.S. planning for deterrence in the Indo-Pacific.[41] In this setting, the end of New START has an indirect but important effect: it weakens the norm that major powers should accept verifiable limits as a basic condition of nuclear stability. That makes it easier for hawkish constituencies in multiple capitals to argue that restraint is outdated, particularly when rival powers modernise and diversify their arsenals and delivery systems.[42]

Finally, regional flashpoints involving North Korea, South Asia, and others are affected by legitimacy and example. Sub-regional nuclear competition does not mechanically follow U.S.-Russia dynamics, but it is politically shaped by the behaviour of the leading nuclear powers. When treaty compliance is suspended, verification collapses, and legal limits expire without replacement, restraint becomes harder to defend as a credible security policy, both domestically and internationally. In this sense, Europe feels the loss of arms control as a crisis of reassurance, while Asia encounters it as part of a broader transition toward a more crowded and less normatively restrained nuclear order.[43]

The Strain on Non-Proliferation Norms and the Human Consequences of Arms Racing

The significance of New START's demise is therefore not only strategic but normative: it weakens the credibility of disarmament commitments while reminding the wider world that the consequences of nuclear competition are globally shared. New START's demise also falls within a broader legitimacy crisis for the Nuclear Non-Proliferation Treaty (NPT) regime. The NPT's disarmament pillar is not merely rhetorical: Article VI commits parties to negotiate in good faith on effective measures relating to disarmament, and the International Court of Justice has interpreted this as an obligation to pursue and conclude negotiations leading to nuclear disarmament under strict and effective international control.[44] When the world's two largest nuclear powers allow the last operational strategic arms treaty to expire without replacement, and after years of stalled reductions, many non-nuclear states regard it as evidence that the disarmament bargain is fraying.[45]

This legitimacy problem does not automatically translate into widespread proliferation. The political and technical barriers to nuclear acquisition remain high, and many states have strong incentives to remain within the NPT system. But legitimacy erosion matters because it weakens compliance norms and makes cooperation harder in moments of crisis. It also strengthens the appeal of alternative frameworks such as the Treaty on the Prohibition of Nuclear Weapons (TPNW), which frames nuclear weapons as categorically unacceptable and seeks to delegitimise possession and deployment.[46] International campaign to abolish nuclear weapons and allied humanitarian actors have explicitly connected the failure of arms control to broader arguments against normalising deterrence and to claims that 'nuclear risk' is borne by populations who do not control the weapons deployed in their name.[47] The deeper danger, then, is not automatic proliferation but the gradual erosion of the moral and diplomatic authority on which the non-proliferation regime depends.

The human consequences extend beyond moral discourse. Modern research on the climatic and agricultural impacts of nuclear war has strengthened the case that even 'regional' nuclear conflicts could produce global harm through soot-driven climate

disruption and food production collapse. A major modelling study in Nature Food availability concluded that nuclear war scenarios injecting significant soot into the stratosphere could severely reduce global calories available, with the most acute vulnerability often concentrated far from the initial blast zones.[48] These findings reinforce a basic but politically inconvenient reality: nuclear danger is not confined to the nuclear-armed states' territories. It is a diffused global risk, carried through climate, trade, and food systems that bind societies together.[49]

Against that backdrop, the end of New START has a societal meaning: it removes one of the few visible signs that the major nuclear powers were still willing to bind themselves legally to restraint and to mutual verification. When that sign disappears, publics may not immediately face 'duck and cover' drills, but they inherit a world in which nuclear risk management is weaker and where the margins for error may narrow in crises. The point is not merely symbolic: the weakening of visible restraint makes nuclear danger easier to normalise politically, even as its consequences remain planetary.[50]

Technology, Decision Time, and Possible Pathways Forward

What makes the post-New START environment especially dangerous is that the erosion of treaty-based restraint now intersects with technologies that compress decision time and blur the line between nuclear and non-nuclear systems. The post-New START environment is shaped not only by warhead numbers, but also by the interaction of nuclear forces with emerging technologies and cross-domain military systems. SIPRI's 2025 assessment explicitly highlighted that future competition will involve technological capacities across multiple domains and that old numeric formulas may be insufficient to manage it.[51] In practical terms, these points point to risks associated with cyber operations, counter-space capabilities, and advanced delivery systems that can blur nuclear and conventional roles, making it harder to interpret intent and increasing the incentives for pre-emption under uncertainty.[52] Risk-reduction research institutions emphasise that instability often arises from misperceptions, inadvertent escalation, and accidents as much as from deliberate intent, particularly in complex multi-actor environments.[53]

A particularly salient issue is the incorporation of artificial intelligence into military decision-support systems. Expert and policy debates increasingly stress that nuclear launch authority must remain under human control. A major arms control association analysis argued that the decision to launch nuclear weapons should remain a human responsibility and highlighted the governance difficulty of understanding how AI may shape recommendations and warnings delivered to decision-makers.[54] Related international discussions, reported by Reuters, have included calls for formal declarations that only humans, not AI, will control nuclear weapons decisions, reflecting a concern that automation could compress decision time and introduce new failure modes under crisis pressure.[55] The analytical implication is clear: in a more automated and cross-domain strategic environment, the absence of agreed constraints magnifies the danger of misinterpretation and inadvertent escalation.

For that reason, the most plausible near-term response is not an immediate return to ambitious deep cuts, but the construction of ‘guardrails’ that can function even when formal treaty negotiation is blocked. Such measures can include parallel political commitments to remain under certain numerical ceilings, renewed crisis communication channels, limited transparency arrangements, and agreements on high-risk destabilising practices (for example, norms around AI in nuclear decision-making or constraints on particularly escalatory categories of testing). Arms control history suggests that partial measures can matter: they preserve habits of cooperation and create islands of predictability that reduce worst-case planning incentives.[56]

Conclusion

A credible forward path cannot simply replicate the Cold War model of bilateral arms control. As the strategic environment becomes more multipolar, any meaningful effort at risk reduction will have to move beyond exclusive U.S.-Russia engagement and take account of China, and all nuclear armed nations, including the European nuclear powers. Russia’s own signalling has at times pointed in this direction by suggesting that British and French arsenals should eventually figure in wider discussions of strategic stability, even if bilateral U.S.-Russia dialogue remains the most immediate and realistic entry point.[57] The point is not that comprehensive multilateral arms control

is politically feasible in the near term. It is that a post-treaty nuclear environment cannot be managed indefinitely through a framework designed for a different strategic era.[58]

The end of New START should therefore be understood not simply as the expiry of one agreement, but as a turning point in the wider erosion of negotiated nuclear restraint. Its most serious effects are political before they become numerical. The immediate danger is not necessarily a sudden surge in deployed warheads, but the gradual normalisation of opacity, hedging, and worst-case planning as accepted features of great-power competition. As verification disappears and strategic mistrust deepens, the incentives for procurement expansion, doctrinal hardening, and alliance reassurance grow stronger, while the political constituency for restraint grows weaker.

The central strategic question, then, is whether New START's end becomes normalised as a condition of 'nuclear without limits,' or whether it acts as a shock that pushes governments back toward forms of structured restraint suited to a more complex nuclear order. Because the consequences of an arms race accumulate slowly, political mobilisation often comes late. Yet the longer verification remains absent, the more likely it is that fear will shape posture, budgets, and signalling, and the more difficult it will become to rebuild trust in compliance.[59] In that sense, the global ripple effect of the end of U.S.-Russia arms control lies not only in the loss of treaty-based ceilings but in the gradual acceptance of a higher baseline of nuclear risk as the price of strategic competition.

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