

## No Treaty, No Panic: Deterrence and Stability After New START

By  
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The expiration of the New START Treaty on February 5, 2026 has fueled concerns that, absent formal limits, uncertainty surrounding U.S. and Russian nuclear forces could generate instability and elevate the risk of arms racing or the threat of nuclear conflict. Although arms control agreements have historically been promoted as acts of transparency and predictability, New START has not been a preeminent example. The end of New START does not threaten global security or stability. A world without the treaty will remain safe and stable because strategic deterrence remains effective!

The New START treaty, signed by the United States and Russia in 2010 and effective in 2011, limited each country to 1,550 deployed strategic nuclear warheads, and 700 deployed intercontinental ballistic missiles (ICBMs), submarine-launched ballistic missiles (SLBMs), and heavy bombers, with a total launcher cap of 800. It includes verification measures like inspections and data exchanges to enhance transparency and predictability in their nuclear relationship. Russia [declared itself compliant](#) with the treaty in 2018, completing the required nuclear weapons reductions after seven years.

In January 2021, Presidents Biden and Putin impulsively extended New START for five years, until 2026, as permitted under Article 14 of the treaty. The Biden administration [emphasized](#) that the United States could not afford to lose the treaty's intrusive inspection and notification mechanisms. Officials argued that failure to extend the agreement would significantly reduce U.S. insight into Russia's long-range nuclear forces, even though on-site inspections had already [been paused](#) since the spring of 2020 due to the COVID-19 pandemic. President Biden had hoped to buy time to negotiate a new treaty that might further reduce the U.S. arsenal, while President Putin, having already [completed over 70 percent](#) of his nuclear modernization, could continue to decelerate U.S. nuclear modernization efforts. In 2023, Putin suspended Russia's participation in the New START treaty, citing U.S. ["inequality"](#) in [support of Ukraine](#).

New START's termination may sound like losing guardrails—but there are solid reasons why its expiration is not only manageable and instead arguably acceptable in today's environment. First, strategic stability—removing incentives to launch a nuclear first strike—among nuclear powers is primarily sustained by strategic deterrence and the intolerable threat of nuclear retaliation rather than by treaty constraints. Both the United States and Russia possess secure second-strike capabilities through diversified and survivable nuclear forces. As long as neither state can expect to eliminate the other's nuclear arsenal in a first strike, the incentive to initiate nuclear war remains low. This deterrence logic has persisted for decades, including periods when no formal arms-control agreements were in place, and even when such agreements are arbitrarily suspended, demonstrating that stability is rooted in structural realities rather than in legal instruments alone.

Second, the absence of New START does not create strong incentives for rapid or destabilizing arms buildups. The arms constrained under New START are the most predictable and thus the most stable. It is Putin's novel weapon systems, developed after New START, which are the most

destabilizing. Several advanced Russian nuclear delivery systems fall outside New START's counting rules, highlighting the treaty's limitations and Putin's intention to violate the spirit of arms control writ large. The Poseidon nuclear-powered torpedo, an underwater drone rather than a ballistic missile, can travel thousands of miles and deliver a massive nuclear payload without being subject to treaty limits. The Burevestnik/Skyfall nuclear-powered, ground-launched cruise missile similarly avoids New START restrictions, which apply only to air-launched cruise missiles carried by treaty-defined heavy bombers. Likewise, the Kinzhal air-launched ballistic missile is carried by aircraft not classified as heavy bombers under the treaty, meaning its nuclear warheads do not count toward the 1,550 deployed warhead cap. Moreover, the treaty was enacted without thought to the advent of Avangard Hypersonic Glide Vehicles or the heavy Sarmat ICBM with its [10-16 multiple](#) warheads, all meant to compress warning and decision time and avoid missile defenses—the essence of destabilizing capability.

Ironically, the U.S. nuclear modernization program was launched as a central condition for the Senate's consent to ratify New START in 2010. The Obama administration committed to a long-term, fully funded modernization of all three legs of the nuclear triad, as well as the supporting nuclear weapons infrastructure, deeming modernization essential to maintain a safe, secure, and credible deterrent over time.

The U.S. [nuclear triad modernization program](#) is primarily focused on replacing aging systems with more reliable and secure platforms, rather than introducing new capabilities or expanding nuclear capacity. The Department of War has no plans to deploy any additional Sentinel ICBMs beyond the 400 Minuteman IIIs already deployed. Additionally, the 14 Ohio-class SSBNs, each with 20 SLBMs, will be replaced by 12 Columbia-class SSBNs, each with 16 SLBM tubes. This represents a 15 percent reduction in “boomers” and a 20 percent reduction in SLBM capacity. Although the final number of nuclear-capable B-21 Raider bombers remains publicly uncertain, the pressure to maintain a greater number of conventional-only bombers will be politically immense. If this behavior signals an arms race, the U.S. is running in third place.

Third, although New START provided valuable transparency through inspections and data exchanges, its expiration does not eliminate visibility into Russian nuclear forces. The key to New START's verification was the introduction of a [physical inspection method](#) in which inspectors could verify and count missile front ends by examining reentry vehicles on-site. They were able to tally objects on missile fronts by inspecting opened covers that hid technical details. Because on-site inspections have not been conducted in six years, this innovative verification process has been replaced by advanced national technical means (NTM), such as satellite imagery, missile-test detection, and intelligence monitoring. While imperfect, NTM can offer insights into adversary capabilities and deployments without requiring a treaty or on-site access and would continue beyond the treaty's expiration. The Biden administration's [final compliance report](#) concluded that the United States could not determine whether Russia remained in compliance during 2024 with its obligation to limit deployed warheads on New START—accountable delivery vehicles. Thus, on-site inspections, the secret sauce of New START, have been effectively nullified for 40 percent of the treaty's existence.

Finally, contemporary strategic stability is influenced by a wider set of factors than those regulated by New START. Missile defense, cyber operations, offensive space systems, drones, artificial intelligence, and precision conventional weapons are now impacting strategic stability, but they remain outside the scope of the treaty. Furthermore, China's breathtaking expansion of its nuclear arsenal since 2020 has completely altered the geostrategic landscape with the goal of "strategic counterbalance—including nuclear deterrence—to sufficiently deter or restrain U.S. military involvement" in the Asia-Pacific region. China's historic nuclear buildup—unconstrained by the New START—has made the U.S. homeland increasingly vulnerable to a direct and catastrophic nuclear attack. New START's limitations, had the treaty continued through 2035, would have effectively relegated U.S. nuclear deterrence capacity to either Russia or China, but not both simultaneously.

Perhaps the greatest tragedy of New START is its omission of a class of nuclear weapons not defined as "strategic." This has enabled Russia to amass a dominant capacity of smaller, shorter-range nuclear weapons with which to coerce its neighbors and enable its malevolent behavior within its near abroad. While often touted as a 10-to-1 advantage, some experts estimate the real Russian advantage in tactical nuclear weapons at 50-to-1. The Congressional Research Service noted an estimate of Russian nonstrategic nuclear warheads at 1,000 to 5,000, a range so expansive as to undermine meaningful threat assessment—an uncertainty enabled by the New START treaty's failure to include any accounting mechanisms for these weapons.

Many credit the 2010 New START Treaty with enhancing predictability and confidence between the U.S. and Russia. Negotiated for a markedly different geopolitical era, the treaty ultimately facilitated Russian nuclear coercion and novel force expansion while providing political justification for U.S. self-restraint. Yet the termination of New START does not render the world unsafe or unstable. In practical terms, the international system has already "survived" nearly six years without a fully functional treaty. Enduring deterrence relationships, ongoing—even if limited—transparency through national technical means, and evolving concepts of strategic stability, including parity approaches, all suggest that global security can and will extend beyond New START. Rather than a cause for alarm, the treaty's demise may warrant cautious celebration: The United States is finally liberated from constraints on both nuclear capability and capacity. If Western democracies are to credibly uphold peace through strength, a robust and flexible nuclear deterrent is essential. With the end of New START, the United States is no longer shackled by an agreement ill-suited to today's strategic realities.

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