

STUDI INTERNAZIONALI

From Bilateral Arms Control to Strategic Competition: The Transformation of Nuclear Stability after the New START

Lorenzo Pagani

For decades, the international system has sought relief and protection through nuclear stability. Starting from the last phases of the Cold War, the two biggest nuclear weapons owners, Russia and the United States, have continuously provided the world with a diplomatic shield consisting of agreements, treaties, and imposed limits aimed at regulating their strategic arsenals and preventing the risk of nuclear escalation. In February 2026, all this has been put in question by the expiration of New START, the last remaining bilateral treaty between Moscow and Washington. For the first time in more than 50 years, no bilateral binding treaty is in force, and no additional agreement is under current negotiation. This essay examines how this interruption could play a revolutionary role in nuclear stability in the contemporary context, adopting a value-based, development-oriented approach. Current geopolitics are indeed characterized by a return to strategic autonomy and the redefinition of strategy and priorities, among which the role of new technologies cannot be relegated to a secondary stage.

The End of Predictability in Nuclear Deterrence

The first major consequence stemming from the absence of a shared regulatory framework is the end of predictability in nuclear deterrence. In this sense, New START represented the apex of a process of transparency that began with pledges to reduce nuclear weapons during the Cold War and eventually led to the establishment of qualitative and quantitative limits, along with regular inspections and data exchanges among the States involved. This mechanism had already been put at stake and proved closely connected to national interests in 2023, when Russia suspended its participation in the Treaty, fearing that the

obligations related to data sharing and transparency could give the US and NATO a strategic advantage in the context of the Russo-Ukrainian conflict. Nowadays, however, with the end of these commitments, the generation of knowledge gaps creates risks of increased weapon numbers and force deployments in the coming years, with worst-case assessments becoming the main driver of decision-making (SIPRI, 2026). Indeed, in the presence of asymmetric information, decisions become more politicized, and a more aggressive approach appears to be the most appropriate strategy.

Technological Innovation and the Transformation of Nuclear Strategy

A second major threat is technological development and the higher potential for dual-use technologies to impact warfare systems. Even while it was in force, the Treaty did not contain provisions addressing modernized weapons. It only allowed States to raise concerns about emerging weapons, but in practice newly developed systems such as Poseidon and Burevestnik were not limited at all (Mattoš and Sykora, 2025, p. 536). After its end, this risk becomes even greater, particularly as concerns grow about the automation of nuclear weapons systems and the role of artificial intelligence. In November 2025, 115 countries in the United Nations General Assembly, most of which are non-nuclear States and largely from the Global South, expressed their support for a resolution that raised clear concerns about integrating AI into nuclear weapons (Bulletin of the Atomic Scientists, 2025). However, the position of nuclear-armed States is much more nuanced. Among them, it is important to recall Donald Trump's executive order launching the Genesis initiative, a comprehensive

appreciation of artificial intelligence and its high potential in the warfare domain (The White House, 2025). His belief, shared by other leaders, is that the leverage achievable and the security provided by reducing the human component can be far superior to the associated risks. On its side, Russia, which voted against the resolution, justified its position by citing excessive ambiguity in the definition of artificial intelligence and by criticizing the possible impact of such restrictions on development and efficiency. In light of this fragmented scenario and the divergent positions among major actors, the absence of a platform for transparency and data exchange could potentially lead to undesired results and negative spillovers for overall international security, contributing to additional complexity and unpredictability in the already fragile diplomatic and communicative channels between the two States (SIPRI, 2026).

The Rise and Affirmation of the Multipolar Nuclear Order

The third area of analysis should be built upon the complexities of the contemporary global order. The starting assumption is that the world in which we are trying to understand the impacts of the crisis of bilateral control is no longer the same as the one that existed when such treaties were originally established. In this sense, New START was still strongly influenced by the bipolar framework established during the Cold War. That framework did not prevent other States from pursuing nuclear ambitions, but it still gave bilateral negotiations a prestigious role and made their strategies meaningful and relevant. Nowadays, the lack of fertile ground for renewed negotiations between Moscow and Washington, despite both leaders' openness to dialogue at different times, is not accidental (Chatham House, 2026). It is rather the product of the contemporary multipolar nuclear order, in which not only weapons, technologies, and psychological attitudes have changed, but, above all, the actors involved. SIPRI data shows this clearly. If we look at the increase in nuclear weapons from 2024 to 2025, still under the New START regime, what stands out is not the figures for the US and Russia, but rather China's development, which has enormously increased its capabilities (SIPRI Yearbook, 2025).

These numbers support the evidence and set possible pathways for the future. In the contemporary multipolar nuclear order, there may no longer be room for purely bilateral agreements. The idea that the nuclear equilibrium and the dynamics of global nuclear armament are managed solely by the usual two leading actors increasingly appears to belong to the past (CSIS, 2026).

The Future of the Control Regime: Divergent Insights

Academic opinion holds that the end of New START and the collapse of the bilateral nuclear arms control system should be seen as a ground zero. Looking behind, there is only the past: previous power dynamics and an anachronistic, albeit historically paradigmatic, approach driven by Russia and the United States. Looking ahead, we can see the rising power of China and the necessity of a trilateral dialogue among the three nuclear triads, following Beijing's rapid narrowing of the gap. We can also imagine other actors potentially becoming involved if we look at current geopolitical dynamics. After Emmanuel Macron's speech on 2 March 2026 introducing the concept of *dissuasion avancée*, the inclusion of France and other European actors, although more distant and less concrete in the immediate future, cannot be completely ruled out (CSI, 2026). This possibility becomes even more relevant when considering that Vladimir Putin had already envisioned such expanded dialogues in 2023 (Kremlin, 2023). Indeed, the key to understanding these dynamics is not always located at the macro level. Often, the most important answers can be found in smaller dimensions of analysis. In particular, internal dynamics within NATO, its future trajectory, and the redistribution of investments and responsibilities regarding the nuclear umbrella will likely shape the diplomatic scenario of the coming years. The three fields of analysis mentioned in the previous paragraphs also allow us to formulate hypotheses regarding broader future tendencies. And this is where academia and public opinion tend to diverge. A large portion of the academic field is genuinely concerned about the great vacuum left by the end of New START. Despite its criticisms and limitations, it remained the only symbolic and structured agreement capable of setting benchmarks and quantitative references on the issue.

Its absence significantly increases vulnerabilities and exposes the international system to many of the risks previously discussed, potentially resulting in a return to hard strategic power politics without the evolution, or even the survival, of the institutional mechanisms designed to sustain stability. On the other hand, figures such as Rose Gottemoeller, the chief negotiator for the US delegation at the time of the New START signature in 2010, have expressed less concern and more confidence regarding these developments (GLOBSEC, 2026). According to her, the expiration of New START marks a natural transition due to the obsolescence of certain provisions, which could eventually be replaced by a new agreement better aligned with contemporary developments (CSIS, 2026). Moreover, regarding the integration of artificial intelligence and technological spillovers in the nuclear weapons domain, she argues that all P5 States remain broadly aligned with the theoretical and ideological principle of maintaining a “human in the loop,” preserving human control over the final deployment decision. (Bulletin of Atomic Scientists, 2024).

Looking ahead

In conclusion, what we are witnessing today represents a historical moment within a global context that is, to some extent, historically significant. It is a complex mix of new technological innovations that humanity still needs to fully understand and learn how to manage. At the same time, it also represents the re-emergence of dynamics, values, and scenarios that many believed belonged to the past, such as the return of great power confrontation and the absence of a clear diplomatic framework for nuclear arms control. What is clear is that, as often happens in the social sciences, especially in a historically fast-changing environment like this, making predictions is extremely difficult and sometimes even counterproductive. Only the coming months, or, more realistically, the coming years, will be able to provide clearer answers to a question that directly concerns our future and that of the generations to come.

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