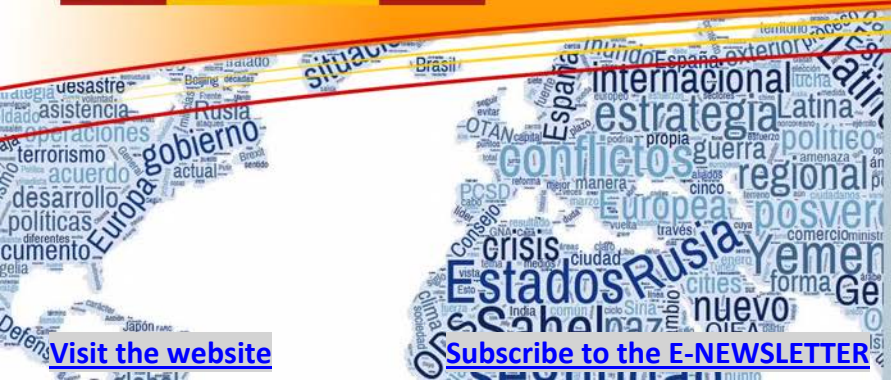
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*Luis V. Pérez Gil**

**Consequences of the end of the New START Treaty, proliferation, and nuclear arsenals in 2026**

# *Consequences of the end of the New START Treaty, proliferation, and nuclear arsenals in 2026*

## *Abstract:*

*Although there were expectations that the total number of nuclear weapons—and consequently the nuclear threat—would continue to decrease in 2026, the results have been negative, and the outlook appears bleak. In February, the New START Treaty—the last remaining disarmament pact—came to an end because the United States and Russia deemed that it no longer served their interests. At the same time, the Trump Administration has made it clear that such agreements depend only on its own security interests. This approach has caused alarm amongst NATO allies, who fear being left to face the war in Ukraine on their own. Consequently, significant changes regarding military nuclear matters have been announced for Europe, the Middle East and the Pacific. In May, the NPT review conference ended in yet another failure. All these developments are driving the world towards a new era of proliferation and, by extension, a more insecure future.*

## *Keywords:*

*Nuclear weapons, strategic stability, New START, proliferation, nuclear latency.*

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## Introduction

In 2026, a series of events took place that marked a turning point in the nuclear strategies of the major powers, but which also affected the non-proliferation regime as we know it. Firstly, on 5 February 2026, the last nuclear arms control agreement came to an end. The Treaty on the Reduction of Strategic Arms (New START Treaty), signed in Prague on 8 April 2010, fulfilled its role for fifteen years in providing confidence and transparency to the regime of strategic stability between the United States and Russia, but it collapsed because it ceased to serve their respective national interests.

Secondly, the Trump Administration, which took office a year earlier (20 January 2025), has made it clear that agreements, treaties and political declarations depend solely and exclusively on its own security interests. This approach has caused consternation amongst NATO allies, who fear they may be abandoned amid a full-scale war against Russia in Ukraine. Consequently, significant changes in the field of military nuclear affairs have been announced both in Europe and in other conflict zones, such as the Middle East and the Pacific.

In Europe, France announced an increase in its nuclear arsenal, and the United Kingdom is also preparing to host US tactical nuclear weapons, if it has not already done so. In the Middle East, the second US-Israeli war against Iran, which began on 28 February 2026 with a decapitation strike that proved to be a complete strategic failure, has confirmed the rule that nuclear weapons confer immunity upon those who possess them, particularly in the case of small nuclear powers, the prime example being North Korea. Other powers such as Saudi Arabia and Turkey maintain close ties with Pakistan, including defence agreements in the event of aggression. In the Pacific too, South Korea and Japan are moving towards nuclear latency, to which Australia could be added within the framework of the AUKUS programme (Australia, the United Kingdom and the United States).

Thirdly, the review conference of the Treaty on the Non-Proliferation of Nuclear Weapons (NPT) of 1 July 1968[1] concluded on 23 May 2026 without a final declaration for the third consecutive time, following the failures of the conferences in May 2015 and August 2022. In these circumstances, many non-nuclear-weapon states no longer harbour any expectations of an agreement that would advance the commitment to denuclearization.

[1] It is a virtually universal treaty: it entered into force on 5 March 1970 and has 191 States Parties.

This is one of the cornerstones of the non-proliferation regime, and may come to support more strongly the Treaty on the Prohibition of Nuclear Weapons (TPNW) of 7 July 2017, which forbids the development, testing, production, stockpiling, deployment, transfer, use and threat of use of such weapons, as well as providing assistance for such activities[2].

Thus, although the total number of nuclear weapons worldwide remains virtually stable, the outlook for nuclear proliferation —both horizontal (more countries acquiring them) and vertical (larger arsenals)— is frankly negative. Symbolically, on 27 January 2026, the Bulletin of the Atomic Scientists moved the Doomsday *Clock* to 85 seconds to midnight, which is the closest it has ever been to global destruction in its entire history[3].

This analytical document examines the most significant milestones of this year. It compares data on nuclear capabilities based on the quantitative studies in *the Nuclear Notebook*, published regularly by the *Bulletin of the Atomic Scientists*, against data from the *Stockholm International Peace Research Institute* (SIPRI), applying any corrections deemed appropriate in the light of the most recent information. It also examines the most likely scenarios over the next fifteen to twenty years from a Kissingerian realist perspective. Not only because this theory best describes the international reality, but also because it enables solutions to be proposed for resolving crises and tensions and, when conflict arises, for seeking to bring it to an end through the application of basic principles such as the recognition of mutual interests, the balance of power and ongoing negotiation[4].

## Nuclear Weapons and Proliferation in the Post-Cold War Era

As noted above, nuclear weapons and proliferation are topics that remained at the edge of mainstream academic research for quite some time[5]. This was essentially because, following the end of the Cold War, it came to be thought that they had lost their value in

[2] In force since 22 January 2021. As of October 2026, it has seventy-five States Parties.
[3] See MECKLIN, J. '2026 Doomsday Clock Statement. It is now 85 seconds to midnight', *Bulletin of the Atomic Scientists*, 27 January 2026, at: https://thebulletin.org/doomsday-clock/2026-statement/
Note: all links in this document are active as at the date of publication.
[4] The fundamental framework of his theory is summarized in KISSINGER, H. **Diplomacy**. Simon and Schuster. New York, 1994, although his scholarly output was vast.
[5] FRÍAS SÁNCHEZ, C. 'The future of nuclear deterrence: an analysis of the strategies of the major nuclear powers'. *Global Nuclear Panorama* (ed. Pérez Gil, L.). Strategy Paper 229-B. Ministry of Defence. Madrid, 2025, pp. 33–62, available at: https://www.defensa.gob.es/documents/2073105/2557568/CE-229-B.pdf/

political-strategic thinking; indeed, it was even considered that they had been sidelined as an instrument of power in international relations in a world understood first as interdependent, then as globalised, and finally as hegemonic. At this point, it is worth recalling the references made by Francis Fukuyama, Charles Krauthammer and Madeleine Albright to US unipolar power.

Despite these considerations, the great powers continued to base their power and influence on nuclear weapons, from the newly established hegemonic power of a unipolar system that lasted barely a blink of an eye in historical terms, to the ailing Russia, which was not sidelined precisely because of the gigantic nuclear arsenal accumulated during the Soviet era. For its part, Communist China gradually became the world's second-largest economy (or the largest, depending on how it is measured) and the world's third-largest nuclear power, far surpassing France and the United Kingdom.

In this process of growth and change, whilst some lost their power due to their own ineptitude (the United States, France, the United Kingdom), others advanced on the back of long-term plans and a foreign policy based on strategic patience and opportunism (China and Russia, though they are not the only ones). In particular, China experienced high rates of economic growth for thirty consecutive years (1993–2022) in the wake of US-led globalisation, but in the field of armaments it refused to submit to general rules, simply because it was so far behind. However, with the breakdown of the strategic stability regime[6], the leaders of the three major powers are aware that they are approaching a decisive confrontation and therefore need to have a free hand to make decisions, which may be correct insofar as they enable agreements to be reached, or wrong because they decide to move towards a clash in their struggle for supremacy.

## Expiry of the New START Treaty

The agreed end to the Cold War allowed for a peaceful shift in the global security architecture, a phenomenon which experts have shown to be the exception in

[6] In a multipolar world, nuclear stability can no longer be viewed solely in the context of Russian-American relations. See NELSON, A. 'Arms control and the management of uncertainty after New START', *Bulletin of the Atomic Scientists*, 4 February 2026, available at: https://thebulletin.org/2026/02/arms-control-and-the-management-of-uncertainty-after-new-start/ ; TRENIN, D. 'Conflict in Ukraine and Nuclear Weapons', *Russia in Global Affairs*, 22 June 2023, at: https://eng.globalaffairs.ru/articles/ukraine-and-nuclear-weapons/

international relations, given that the general rule is that such changes occur following a major armed conflict. The disarmament agreements signed between the United States and the Soviet Union (later Russia) led to a dramatic reduction in the number of nuclear weapons, from a peak of nearly 70,000 in 1986 to just over 12,000 today[7]. However, as well as setting strict limits on certain types of weapons, they established mechanisms for data-sharing and inspections which fostered the climate of mutual trust necessary for strategic stability and non-proliferation regimes to function[8].

Nevertheless, at a certain point, US foreign policy makers decided they could abandon these agreements because they considered them no longer useful in a globalised world in which they held economic and military dominance and had no rivals. In 2002, they withdrew from the Anti-Ballistic Missile Treaty (ABM Treaty); in 2019, from the Intermediate-Range Nuclear Forces Treaty (INF Treaty); and in 2020, from the Open Skies Treaty. Then, when war broke out in Ukraine in February 2022, only the New START Treaty remained in force – arguably the most important of all, as it maintained not only the limit of 1,550 strategic warheads for each party, but also the mechanisms for the exchange of information, inspections and regular meetings within a framework that had been stable and uncontested until then.

In fact, both parties strictly complied with the treaty's provisions, despite the fact that on 21 February 2023 President Vladimir Putin announced the suspension of his country's participation amidst the war in Ukraine, whilst continuing to adhere to the limits and other ancillary provisions, such as prior notification of the launch of long-range ballistic missiles[9].

However, the treaty came to an end on 5 February 2026 once the five-year extension agreed in January 2021 by Presidents Joseph Biden and Putin had expired, one year

[7] On the basis of the disarmament agreements, see the recent reflections by PODVIG, P. *'Watching Reykjavik from Moscow'.* Russian Forces blog, 11 October 2026, at: https://russianforces.org/blog/2026/10/watching_reykjavik_from_moscow.shtml

[8] ERATH states that verification 'was a key component of the treaty's success in building confidence and maintaining strategic stability' and that the Bilateral Consultative Commission provided a forum for regular discussion to resolve problems or discrepancies arising from the treaty's implementation (in 'In a world without New START, old verification regimes could be key to strategic stability', *Bulletin of the Atomic Scientists*, 4 February 2026, at: https://thebulletin.org/2026/02/in-a-world-without-new-start-old-verification-regimes-could-be-key-to-strategic-stability/)

[9] We address this issue in PÉREZ GIL, L. *'La suspensión de la participación de Rusia en el tratado Nuevo START*'. Documento de Opinión IEEE 34/2023, available at: https://www.defensa.gob.es/documents/2073105/2077230/La+suspensi%C3%B3n+de+la+participaci%C3%B3n+de+Rusia+en+el+tratado+Nuevo+START.pdf/

before the outbreak of the war in Ukraine[10]. Consequently, both parties squandered the timeframe available to them to negotiate a new agreement, and neither assumed its responsibility, despite the latent risk of conflict in Eastern Europe.

A few months before its expiry, on 22 September 2025, President Putin made a unilateral statement in which he proposed continuing to comply with the New START limits for one year, provided that the United States followed suit. Although there has been no official statement from the US adhering to this moratorium, both sides have so far acted as if these limits were still in force. It is, therefore, a tacit agreement, based on the mutual convenience of the parties, but one which may be suspended at any time, thereby ceasing to be in force[11]. The reality is that, for the first time in over fifty years, there is no nuclear arms limitation treaty in force[12], nor are negotiations underway to achieve one. Added to this is the gradual expansion of China's arsenal against a backdrop of strategic competition that defines current international relations[13].

## Escalation of the conflict in Ukraine

As has been noted previously, it was the failure of deterrence that led the Kremlin leadership to definitively break with the rules of the European security order established since 1989 and decide to invade Ukraine, because they knew that the United States could no longer wield its power –not military power, but the power of persuasion– to prevent a resurgent Russia from carrying out its plans. For its part, NATO was founded on the premise of US military supremacy, but this too is now being called into question. Whether or not Russia succeeds in winning the war in Ukraine is another matter, and that will only be determined by future events. However, it was the correct identification of this American weakness that led them to take such a step.

[10] It is likely that the extension of the New START treaty was one of the strategic prerequisites for the Kremlin leadership's decision to intervene militarily in Ukraine. Historiography has not yet explored this line of inquiry.
[11] In this regard, see STEFANOVICH, D. 'The view from Moscow: The future of nuclear arms control exists, but the path is hard', *Bulletin of the Atomic Scientists*, 13 May 2026, at: https://thebulletin.org/premium/2026-05/the-view-from-moscow-the-future-of-nuclear-arms-control-exists-but-the-path-is-hard/
[12] DWYER, G. 'New START expires. Now what?', *Bulletin of the Atomic Scientists*, 4 February 2026, at: https://thebulletin.org/2026/02/new-start-expires-now-what/
[13] See also PIFER, S. 'With New START expiring, it's now dialogue or arms racing', *Bulletin of the Atomic Scientists*, 4 February 2026, at: https://thebulletin.org/2026/02/with-new-start-expiring-its-now-dialogue-or-arms-racing/

On 24 February 2022, the Russian leadership did not take a leap of faith; rather, their military intervention against Ukraine was underpinned by their own nuclear might. It is worth recalling that a global nuclear war exercise was conducted five days before Russian forces were launched against Ukraine. The nuclear capabilities brought to bear served as a stark warning of the consequences of standing in their way, as President Vladimir Putin himself stated in a gloomy speech in the early hours of the day of the invasion[14]. And these threats have been repeated whenever they have perceived that the United States or its allies were attempting to cross the fundamental 'red line' set by the Kremlin in the Ukrainian conflict: direct intervention by external countries[15].

Russian leaders have therefore used their nuclear might to block direct intervention by Western powers in their war against Ukraine[16]. Furthermore, in March 2023, they announced the deployment of nuclear weapons outside national territory for the first time since the 90s, specifically in Belarus[17], although their presence has not been confirmed to date. Although from an operational point of view this does not represent an increase in Russian capabilities[18]. It forms part of the Kremlin's strategy aimed at creating greater uncertainty amongst NATO allies and complicating their plans for an attack in the event of a conflict.

After four and a half years of war, that rule has been upheld and, despite all the support received, the Ukrainians find themselves on their own in their military confrontation with Russia. The alternative for Western countries is dire: to face a direct conflict with the world's greatest nuclear power, risking an escalation and, ultimately, a nuclear exchange, in which the Europeans would, without a shadow of a doubt, be the hardest hit, because any war that broke out would be fought mainly on their own soil. At this point, it is worth recalling the results of various war games conducted within NATO since the days of the Cold War.

[14] Full text available on the Kremlin's website: http://www.kremlin.ru/events/president/news/67843
[15] We have written more extensively on this subject in PÉREZ GIL, L. 'Russia's nuclear power: new approaches to capabilities and doctrine of use', *Global Nuclear Panorama* (Pérez Gil, L., ed.). IEEE Strategy Paper 229-B. Ministry of Defence. Madrid, 2025, pp. 63–94, at: https://www.defensa.gob.es/documents/2073105/2557568/CE-229-B.pdf/
[16] At the same time, it should be noted that President Trump has threatened on at least seven occasions to wipe Iran off the map of the Middle East in one fell swoop, which can only be achieved through the massive use of nuclear weapons. These are the sort of statements that only major powers can get away with.
[17] See SOKOV, N. 'Russia is deploying nuclear weapons in Belarus. NATO shouldn't take the bait', *Bulletin of the Atomic Scientists*, 24 April 2023, at: https://thebulletin.org/2023/04/russia-is-deploying-nuclear-weapons-in-belarus-nato-shouldnt-take-the-bait/
[18] Russia already has nuclear weapons as close to Poland and the Baltic states as Kaliningrad.

For Europeans, the use of two or three hundred nuclear weapons would annihilate any prevailing socio-political structure, leaving only chaos in its wake. Yet the Russians and Americans would still have thousands of warheads at their disposal to continue threatening one another and to reach agreements, for that is a characteristic of great powers: they can come to agreements amongst themselves without seeking permission from others. Historical examples abound, one only need to recall the 1938 Munich Conference, which handed Czechoslovakia over to Hitler, or the 1945 Yalta and Potsdam agreements, which handed Poland over to the Soviets.

## Changes in nuclear policies in Europe

The gradual deterioration of security in Europe, accelerated as a result of the clash with Russia over support for Ukraine's war effort, is bringing about significant changes in the policies of the United Kingdom and France to possess nuclear weapons –the only two NATO members, alongside the United States– thereby increasing vertical proliferation on the European continent.

Following the end of the Cold War, the United Kingdom became the only nuclear power to concentrate its entire deterrent capability on a single delivery system: the *Royal Navy's* strategic nuclear-powered submarines (SSBNs) armed with US ballistic missiles. However, on 16 March 2021, the British government included in its Integrated Review of Security, Defence, Development and Foreign Policy plans to increase the number of warheads in service (from 180 to 260)[19]. And on 24 June 2025, it announced the acquisition of fifth-generation F-35A fighter jets with nuclear capability, which will take part in NATO's nuclear deterrence missions[20].

[19] *Global Britain in a Competitive Age: the Integrated Review of Security, Defence, Development and Foreign Policy*. 16 March 2021, updated 2 July 2021, specifically pp. 75–77, at: https://www.gov.uk/government/publications/global-britain-in-a-competitive-age-the-integrated-review-of-security-defence-development-and-foreign-policy/

[20] British Ministry of Defence. 'UK to Purchase F-35As and Join NATO Nuclear Mission as Government Steps Up National Security and Delivers Defence Dividend', 24 June 2025, at: https://www.gov.uk/government/news/uk-to-purchase-f-35as-and-join-nato-nuclear-mission-as-government-steps-up-national-security-and-delivers-defence-dividend

Added to these national decisions is the highly likely deployment of US B61-12 guided nuclear bombs on British territory for the first time since 2008[21]. These initiatives form part of a strategy aimed at achieving battlefield superiority at all levels of escalation.

For his part, French President, Emmanuel Macron, announced on 18 March 2025 long-term plans to increase nuclear capability within the Strategic Air Forces (*Forces Aériennes Stratégiques*), doubling the number of Rafale fighter squadrons with nuclear capability by 2035[22]. A year later, on 2 March 2026, in another speech at the Île Longue naval base (Brittany), he announced a gradual increase in the number of nuclear warheads, without revealing the figure, with the aim of heightening uncertainty amongst potential adversaries[23]. He also put forward the proposal for 'advanced deterrence' (*dissuasion avancée*) with certain European partners (not all of them, and this is very important), without abandoning the fundamental principles of French nuclear doctrine[24].

However, France lacks the political and military capacity to take on the role of the United States in a hypothetical European programme, and it seems unlikely that it would be willing to share nuclear knowledge and expertise with other European partners. Meanwhile, it is strengthening its nuclear military cooperation agreements with the United Kingdom and with Germany, which lacks such weapons due to conditions imposed by the major powers to allow for its reunification in 1990. These initiatives are being pursued without any transparency and against the backdrop of the war in Ukraine[25].

Furthermore, any notion of a European nuclear deterrent continues to be ruled out because most EU Member States still consider that their security ultimately depends on the maintenance of US guarantees, not only within the NATO framework but also through the bilateral commitments they have in place; among the most notable are Denmark, the

[21] AMADAE, S. and STEVENSON, T. 'Is London shifting from nuclear deterrence to war-fighting?', *Bulletin of the Atomic Scientists*, 10 July 2026, at: https://thebulletin.org/2026/07/is-london-shifting-from-nuclear-deterrence-to-war-fighting/

[22] *Déclaration de M. Emmanuel Macron, président de la République, sur l'armée de l'air et la politique de la défense, à la Base aérienne 116 Luxeuil-Saint-Sauveur le 18 mars 2025*. 18 March 2025, at: https://www.vie-publique.fr/discours/297811-emmanuel-macron-18032025-armee-de-lair

[23] *Discours du Président de la République sur la dissuasion nucléaire de la France*. The Élysée Palace, 2 March 2026, at: https://www.elysee.fr/front/pdf/elysee-module-26067-fr.pdf

[24] See FAYET, H. 'France has a new nuclear doctrine of "forward deterrence" for Europe. What does it mean?', *Bulletin of the Atomic Scientists*, 5 March 2026, at: https://thebulletin.org/2026/03/france-has-a-new-nuclear-doctrine-of-forward-deterrence-for-europe-what-does-it-mean/ ; MARCUZ, E. 'How France's new nuclear doctrine strengthens NATO', *Bulletin of the Atomic Scientists*, 9 June 2026, at: https://thebulletin.org/2026/06/how-frances-new-nuclear-doctrine-strengthens-nato/

[25] For this debate, see DIESEN, G. 'John Mearsheimer and Sergei Karaganov: a nuclear strike on Europe to restore deterrence', YouTube, 14 June 2026, at: https://youtu.be/4cJ1FgvNs44?is=Zy74fj0vWhyqQpkG

United Kingdom, Norway, Poland and all the small states on the eastern flank[26]. This scenario is unlikely to change over the next decade, although it cannot be ruled out that countries such as Germany or Poland may attempt to move closer to the nuclear threshold.

## Nuclear latency in the Middle East and the Pacific

There is a group of non-nuclear states that possess the scientific, technological and military capabilities required to produce such weapons should they so decide. At the same time, their leaders have made statements that can be interpreted in this light or have clearly expressed an interest in acquiring them. The main candidates are located in the two strategic areas where current conflict scenarios are concentrated, and which are also the most likely to see conflict in the near future.

In the Middle East, confirmation of Iran's military nuclearisation would be met with an almost immediate announcement by Saudi Arabia that it possesses nuclear weapons[27], backed by its long-standing defence agreements with Pakistan. The next country to take this option would be Turkey, which, in addition to its own security motivations, harbours aspirations to exercise regional supremacy. In both cases, these are dynamics characteristic of power dyads, where one actor will respond swiftly to an action by its opponent in order to maintain the balance of power, because falling behind would mean finding itself at a disadvantage.

In the Pacific, a similar scenario can be observed in South Korea, Japan and Australia, but in this case the main triggering factor is not directly determined by the strengthening of their regional opponents (China and North Korea), but by the growing questioning of the credibility of US extended deterrence guarantees, given that, as in Europe, these are states that are under military protection.

[26] We wrote on this subject twenty years ago, in the midst of the European constitutional process, yet no progress has been made. In ARROYO LARA, E. and PÉREZ GIL, L. 'Hacia la creación de un sistema europeo de disuasión nuclear', *Política y Estrategia* 100, 2005, pp. 77–104, available at: https://biblat.unam.mx/hevila/Politicayestrategia/2005/no100/5.pdf

[27] In this regard, recently AZODI, S. 'Dismantle, weaponise, or rebuild: Why the Iran nuclear threat isn't going away', *Bulletin of the Atomic Scientists*, 29 October 2026, available at: https://thebulletin.org/2026/10/dismantle-weaponize-or-rebuild-why-the-iran-nuclear-threat-isnt-going-away/

In South Korea, political leaders and officials have made contradictory statements regarding a potential military nuclear programme, at times acknowledging the need to pursue it and at others asserting that it would be ill-advised due to the threat of international sanctions by the five permanent members of the Security Council (known as the P5). Significantly, opinion polls consistently show support of over 70% for nuclearization with the aim of strengthening deterrence against North Korea. The country has a powerful civil nuclear industry, has mastered the full nuclear fuel cycle and possesses a solid scientific and technological base. In the military sphere, it has made significant advances in ballistic and cruise missiles, as well as conventional submarines.

On 14 November 2025, the South Korean government reached an agreement with the United States on the transfer of uranium enrichment technology, and on 26 May 2026 it presented the 'Basic Plan for the Development of the Republic of Korea Nuclear-Powered Submarine' with a target date of 2040. At the same time, it issued a unilateral declaration in which it undertook not to develop or possess such weapons and to negotiate additional inspection mechanisms with the International Atomic Energy Agency (IAEA)[28].

Japan also has an extensive civil nuclear programme, as well as outstanding technical and technological capabilities in the nuclear field. Although it has historically suffered two atomic tragedies on its own territory (first the bombings of Hiroshima and Nagasaki in August 1945 and then the accident at the Fukushima nuclear power station in March 2011), in recent years it has been progressively lifting the safety barriers it had in place, moving closer to the nuclear threshold[29].

However, as is the case with Germany in Europe, should it take that step, it would face strong opposition from China and Russia, which are mindful of its militarist past that led to the outbreak of the Second World War –one in Europe and the other in the Pacific. In such scenarios, the possibility of a pre-emptive strike by those powers to block Japan's nuclear rise cannot be ruled out, as the United States proposed during the Cold War against China, although this never materialised due to opposition from Soviet leaders.

[28] See our analysis in PÉREZ GIL, L. *El programa de submarinos nucleares de Corea del Sur no será el último.* Derecho y Política Internacional Blog, May 2026, at: https://ullderechointernacional.blogspot.com/2026/05/el-programa-de-submarinos-nucleares-de.html

[29] HAN, H. 'US nuclear sharing in Asia and its implications for regional security', *Bulletin of the Atomic Scientists*, 3 June 2026, at: https://thebulletin.org/2026/06/us-nuclear-sharing-in-asia-and-its-implications-for-regional-security/

For its part, Australia is geographically distant from the most likely conflict scenarios outlined above, but it is a staunch ally of the United States in its policy of containment, which was launched towards the end of George W. Bush's presidency and expanded under subsequent administrations. Thus, on 15 September 2021, President Biden and Prime Ministers Boris Johnson and Scott Morrison made a surprise announcement of a programme for nuclear-powered attack submarines (SSNs) for the Royal Australian Navy as part of the AUKUS pact[30]. Australia expects to take delivery of the first US Virginia-class submarines over the next decade, likely on a lease basis[31], and plans to build its own submarines domestically at a later stage with technical and technological assistance from its two allies[32].

Although possessing SSNs does not imply possessing nuclear weapons, there is nothing to prevent them from carrying nuclear-capable Tomahawk cruise missiles in the future to carry out sub-strategic missions, or even aspiring to have their own SSBNs, as in the case of India. The evolution of stability in the Pacific basin will determine these options.

Beyond these cases, a growing number of countries are launching technological programmes to acquire advanced conventional capabilities such as long-range missiles, hypersonic weapons, space capabilities or the application of artificial intelligence (AI) in the defense sector which –although they do not fall within the scope of nuclear deterrence– contribute to undermining strategic stability and, consequently, increase the risks of proliferation in those countries that have the capacity to attain nuclear capability.

## Failure of the NPT Review Conference

Article VIII, paragraph 3, of the NPT provides for a review of its implementation every five years, a provision which was reaffirmed at the 1995 Review and Extension Conference and at the 2000 Review Conference. Accordingly, the 11th Review Conference was held at UN

[30] See the Australian Prime Minister's statement of 16 September 2021, at: https://www.pm.gov.au/media/australia-pursue-nuclear-powered-submarines-through-new-trilateral-enhanced-security

[31] This is not unprecedented. Since the 1980s, the Indian Navy has operated SSNs leased first from the Soviet Union and later from Russia, which enabled it to learn, train and develop its own naval doctrine for the deployment of nuclear submarines. The next step was to design and build its own SSBNs with Russian assistance, which it achieved at the end of the last decade. See PÉREZ GIL, L. 'Las aspiraciones de la India como potencia nuclear naval y su fuerza de SSBN, *Revista General de Marina*, vol. 276, July 2019, pp. 91–103, at: http://www.armada.mde.es/archivo/rgm/2019/07/rgm072019cap09.pdf

[32] MAYHEW, N. 'What's next for the AUKUS submarine deal?', *Bulletin of the Atomic Scientists*, 25 April 2023, at: https://thebulletin.org/2023/04/whats-next-for-the-aukus-submarine-deal/

Headquarters in New York between 27 April and 23 May 2026. The negotiations took place against a backdrop of scepticism and a gradual breakdown in dialogue between the nuclear powers (nuclear-weapon states, according to the terminology of the NPT) and non-nuclear-weapon states, the latter of which denounce the risks of a new arms race fuelled by massive modernisation programmes and announcements of increases in operational warheads – which constitutes a breach of the obligation to achieve complete disarmament laid down in Article VI of the treaty itself[33].

The US delegation proposed multilateral talks on strategic stability, which would include issues such as transparency, risk reduction and a ban on nuclear testing. The basis for their position is that they claim to have reduced their strategic arsenal by 80% and their tactical arsenal by up to 90% since 1991. However, the proposal does not appear realistic at present, given that there are at least two major conflicts currently underway, and because of the complexity of reconciling the positions of the five recognised nuclear powers, which differ in the size and structure of their armed forces, their doctrines and their varying perceptions of the threat[34]. Furthermore, the outlook regarding the US *Nuclear Posture Review* currently under way points in the opposite direction: towards a narrowing of the distinction between conventional and nuclear warfare, thereby increasing the risks of unintended escalation[35].

Consequently, despite the efforts made in recent days by the conference chair, Ambassador Do Hung Viet, and the UN Under-Secretary-General for Disarmament Affairs, Izumi Nakamitsu, no agreement was reached on a final declaration[36]. The next meeting is scheduled for 2031, which seems like an excessively long timeframe given the speed at which global security is deteriorating. It therefore seems clear that the non-proliferation regime is in crisis and that there may be a fragmentation of positions amongst its States

[33] See GOODMAN, M. 'The 11th NPT Review Conference ends with a whimper', *Bulletin of the Atomic Scientists*, 27 May 2026, at: https://thebulletin.org/2026/05/the-11th-npt-review-conference-ends-with-a-whimper/

[34] See ARBATOV, A. and BOGDANOV, K. 'After New START: Why new formats of strategic arms control need a common view', *Bulletin of the Atomic Scientists*, 15 June 2026, at: https://thebulletin.org/2026/06/after-new-start-why-new-formats-of-strategic-arms-control-need-a-common-view/

[35] The information that has come to light points not only to a significant increase in the capabilities of the nuclear triad, but also to an expansion of the options available to the US President for responding to a crisis or conflict. See CIRINCIONE, J. 'Pentagon's secret plan: Reviving Cold War doctrines to lower the threshold for nuclear war', *Bulletin of the Atomic Scientists*, 11 September 2026, at: https://thebulletin.org/2026/09/pentagons-secret-plan-reviving-cold-war-doctrines-to-lower-the-threshold-for-nuclear-war/

[36] See the press release entitled 'Nuclear treaty review ends without consensus, fueling fears of an arms race', UN, 23 May 2026, at: https://news.un.org/es/story/2026/05/1541490

Parties[37]. In particular, states that are also parties to the TPAN categorically reject nuclear deterrence strategies because they consider them to represent a dangerous, misguided and unacceptable approach to security, and to increase threats and the risk of conflict[38].

Indeed, the combination of the need to strengthen deterrence in an increasingly complex and unstable world, the repeated failures of non-proliferation efforts, and the possibility of resolving a conflict immediately through the use of nuclear weapons are the main factors fuelling scenarios of nuclear latency and proliferation amongst those states that possess the resources and the will to achieve this[39].

Therefore, most of the experts cited in this analysis paper propose a series of steps to reduce strategic risks in the nuclear sphere: tacit compliance with the quantitative limits of the New START Treaty, the resumption of the exchange of data and information in good faith, the resumption of strategic dialogue between the major powers (the United States, Russia and China), advance notifications of missile launches and nuclear triad exercises, the establishment of technical mechanisms to prevent misinterpretations involving delivery systems or launch vehicles, the resumption of on-site inspections regardless of the existence of explicit treaties, absolute safeguards for nuclear infrastructure during conflicts in line with lessons learnt from the wars in Ukraine and the Middle East, as well as the indefinite maintenance of unilateral moratoriums on nuclear testing.

## Nuclear arsenals in 2026

Russia has the world's largest arsenal, with 5,416 warheads (39 fewer than in 2025), of which 2,606 are assigned to the strategic triad (Strategic Missile Forces, Navy and Long-Range Aviation) and 1,790 to the tactical triad (Army, Navy and Aerospace Forces). It should be noted that the tactical warheads are stored in depots distributed throughout the country under the custody of the 12th Main Directorate of the Ministry of Defence (12th

[37] See SAMUEL, O. and MAPAKO, K., 'Beyond managed rivalry: The non-nuclear-weapon state perspective on the future of arms control', *Bulletin of the Atomic Scientists*, 13 May 2026, at: https://thebulletin.org/premium/2026-05/beyond-managed-rivalry-the-non-nuclear-weapon-state-perspective-on-the-future-of-arms-control/
[38] Indeed, the first review conference on this treaty will be held at UN Headquarters in New York from 30 November to 4 December 2026, by which time this article will have been published.
[39] VAN HOOFT, P. 'Nonproliferation and strategic stability as US extended nuclear deterrence erodes', *Bulletin of the Atomic Scientists*, 3 June 2026, at: https://thebulletin.org/2026/06/nonproliferation-and-strategic-stability-as-us-extended-nuclear-deterrence-erodes/

GUMO), which is responsible for their storage, transport and protection. A further 1,020 warheads are in the process of being dismantled, but could be reactivated in the event of a crisis or conflict.

It is worth drawing attention to the latest *Nuclear Notebook* report on Russia, which indicates a 17% increase in the number of tactical warheads (317 more than the previous year) without any significant movements having been observed at the 12th GUMO depots. The authors note that the Russian nuclear arsenal decreased by 39 units, but to make the figures add up, they subtracted 226 from the strategic triad and a further 130 from those undergoing decommissioning, which are also stored in these centralized depots[40].

This change in the count tends to align with the assessments that US intelligence agencies have been making for over a decade, estimating the number of Russian tactical warheads at between 1,000 and 2,000 –a difference of no less than 100%. Thus, without justification, changes are being attributed to the structure of Russia's nuclear arsenal that do not correspond to observable reality, thereby emphasising the importance of the tactical triad in the wake of the war in Ukraine[41].

In second place, the United States has 5,042 warheads: 3,500 strategic (Air Force and Navy), 200 tactical (Air Force) and 1,342 currently being decommissioned[42]. These figures highlight the different structure of the nuclear forces of Russia and the United States, where, in the case of the US, tactical weapons play a symbolic role and the majority of them are deployed in Europe as part of the nuclear deterrence mission, at the disposal of NATO forces in the event of a conflict[43].

In third place, it is estimated that China has 620 warheads, of which 600 are believed to be in service and around 20 in storage[44]. This means that, despite the alarmist statements from officials in the US intelligence community and the military, China's nuclear arsenal

[40] KRISTENSEN, H. *et al*. 'Russian Nuclear Weapons, 2026', *Bulletin of the Atomic Scientists*, 3, 2026, pp. 221–254, at: https://doi.org/10.1080/00963402.2026.2659527

[41] Professor Theodore Postol, of the Massachusetts Institute of Technology (MIT), has offered more authoritative critiques of other recent assessments published in the Bulletin of the Atomic Scientists regarding Iran in May 2026. See DIESEN, G. 'Theodore Postol: Iran can now produce between 10 and 20 nuclear weapons', YouTube, 18 May 2026, at: https://www.youtube.com/watch?v=LFQLghQWUG8

[42] KRISTENSEN, H. *et al*. 'United States nuclear weapons, 2026', *Bulletin of the Atomic Scientists*, 2, 2026, pp. 119–150, available at: https://thebulletin.org/premium/2026-03/united-states-nuclear-weapons-2026/

[43] For further details, see KRISTENSEN, H. *et al.* 'Nuclear Notebook: The Changing nuclear landscape in Europe', *Bulletin of the Atomic Scientists*, 6, 2025, pp. 485–505, at: https://thebulletin.org/premium/2025-12/the-changing-nuclear-landscape-in-europe/

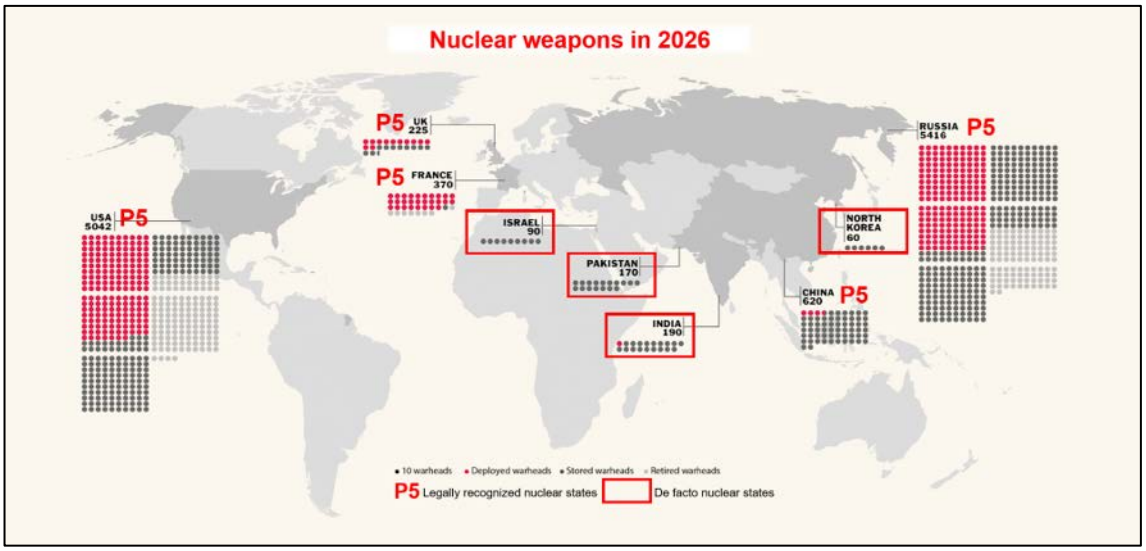
[44] KRISTENSEN, H. *et al*. 'Chinese nuclear weapons, 2026', *Bulletin of the Atomic Scientists*, 4, 2026, pp. 293–322, available at: https://thebulletin.org/premium/2026-07/chinese-nuclear-weapons-2026/

remains significantly smaller than that of the two nuclear superpowers: 8.73 times smaller than Russia's and 8.13 times smaller than that of the United States. Furthermore, its doctrine of use is based on the principles of self-reliance and no-first-use (NFU), something that neither the United States nor NATO has ever declared, nor is it part of current Russian doctrine.

China's low-profile nuclear doctrine justifies the storage of warheads in regional depots across the country, and their use can only be authorised by the Central Military Commission, although the process of centralising power at the top undertaken by Xi Jinping from 2013 onwards has placed this decision within his authority, as is the case with his Russian and American counterparts. However, changes could be made to its nuclear doctrine[45].

These three major powers account for 91% of existing weapons. The remainder are held by smaller powers with token arsenals compared to the overwhelming might of Russia and the United States: France (370 warheads) and the United Kingdom (225), whose status is recognised under the NPT, and India (190), Pakistan (170), Israel (90) and North Korea (60) as *de facto* nuclear powers, totalling 1,105 between them. Thus, it is estimated that the global total in 2026 will stand at 12,183 weapons, which, whilst far from the colossal levels of the Cold War, are sufficient to turn any conflict into a disaster on a scale never before seen in history.

[45] RUST, R. 'Here's why China acknowledged its new missile silos in a documentary', *Bulletin of the Atomic Scientists*, 15 September 2026, at: https://thebulletin.org/2026/09/heres-why-china-acknowledged-its-new-missile-silos-in-a-documentary/ ; ZHANG, H. 'China has likely resumed making weapon-grade uranium at Emeishan', *Bulletin of the Atomic Scientists*, 2 November 2026, at: https://thebulletin.org/2026/11/china-has-likely-resumed-making-weapon-grade-uranium-at-emeishan/




Source: own analysis, based on *Nuclear Notebook* and SIPRI.

So, what is it that has prevented their use since Hiroshima and Nagasaki in 1945? It is likely a combination of common sense and a rational cost-benefit analysis in the event of conflict, underpinned by the strategy of mutually assured destruction (MAD). Although there have been proposals and calls for their use –most recently in the context of the wars in Ukraine and the Middle East– those in a position to make such decisions remain rational, and as long as that remains the case, the world will be safe.

## Conclusions

Firstly, the nuclear arms control regime established at the end of the Cold War has come to a definitive end, and it is unlikely that the superpowers will reach any explicit agreement in the near future due to their own uncertainty regarding each other's position within an unstable multipolar system. China will continue to oppose any agreement that does not recognise its parity with the other two. Consequently, compliance with agreements, declarations and procedures governing the risks associated with a nuclearised world – such as the notification of ballistic missile launches, the moratorium on loading warheads onto attack submarines and direct lines of communication in the event of a crisis (the famous 'red telephone')– will be maintained. Likewise, dialogue will continue within the P5 format, which brings together the world's leading powers.

Secondly, the danger of both horizontal and vertical escalation of war has not only failed to diminish but has increased significantly. Conflicts between nuclear powers and other

states are fuelling a growing interest in nuclear weapons as the only effective defence against aggression from those powers (the example of North Korea supports this view). As a result, some states are expressing their willingness to accept nuclear weapons from a nuclear superpower in addition to the nuclear umbrella and joint nuclear missions (Poland, the Baltic states, Belarus), whilst others are planning to acquire their own arsenals (South Korea or Japan), or initiatives such as France's so-called 'advanced nuclear deterrence' are emerging. Whilst all these approaches aim to restore deterrence, they entail a breach of the basic principles of the non-proliferation regime.

Thirdly, the world faces scenarios involving new nuclear powers. Any new nuclear state will bring further disruption to the international system, including a domino effect resulting both from the direct reaction of neighbouring states (the creation of regional nuclear dyads) and from the breakdown of the non-proliferation regime. Consequently, more states possessing such weapons will make the world a more dangerous place. In response, the superpowers will expand their arsenals and delivery systems and utilise their technological advantages (early-warning systems, anti-missile defense, hypersonic, and the integration of artificial intelligence into nuclear command, control and communications, or C3N). This will also, at some point, lead to the resumption of nuclear testing.

Fourthly, the first use of nuclear weapons (in reality, the second) will probably occur in the context of a regional war. This will lead to a wider use of such weapons in interstate conflicts and will undermine the nuclear deterrence strategies previously in force, which were based precisely on their non-use. In this scenario, the MAD strategy will take on renewed relevance not only amongst the superpowers, but also between them and the rest of the world, re-establishing the non-use of nuclear weapons amongst them through a sort of stalemate. Its use will be reserved for wars between nuclear powers and non-nuclear states, thanks to its ability to resolve a conflict rapidly, thereby eliminating the prospect of protracted wars –which is one of the lessons learnt from the war in Ukraine.

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