

SWP-WebMonitor

Nordamerika

Nr. 15/2026, 18.09.2026 – 02.10.2026

SWP-Informationsservices

Katrin Schumann

Der SWP-WebMonitor Nordamerika ist ein kompaktes Informationsprodukt mit ausgewählten Hinweisen auf aktuelle Stellungnahmen, Dokumente und Analysen zu relevanten Fragen und Entwicklungen der US-amerikanischen Verteidigungs- und Sicherheitspolitik, Außenpolitik, Wirtschafts- und Handelspolitik sowie Innenpolitik. Beigeordnet sind die Themen Foresight und ein Blick auf kanadische Think-Tank-Publikationen.

Bei allen Titeln gibt es einen Link, oft direkt zum Volltext. Grundlage der Erstellung ist ein überwiegend festgelegtes Set an diversen Webquellen aus den USA, Europa und Kanada. Der WebMonitor Nordamerika erscheint in der Regel ein- bis zweimal monatlich.

USA Defense

Buchhinweis

Germany Rearmed

The Return of War and the End of Illusions

By Liana Fix

Oxford University Press

November 2026

<https://www.cfr.org/books/germany-rearmed>

RealTime Economics

Freyja and the making of a European defense industry

Elina Ribakova (PIIE), Nataliia Shapoval (Kyiv School of Economics Institute) and Guntram B. Wolff (Bruegel)

October 1, 2026

<https://www.piie.com/blogs/realtime-economics/2026/freyja-and-making-european-defense-industry>

AEIdeas

Cracks in America's Nuclear Deterrent

by Brady Africk, Kyle Balzer

September 30, 2026

<https://www.aei.org/foreign-and-defense-policy/cracks-in-americas-nuclear-deterrent/>

Report

Behind the Front Line

Integrating AI Agents into Joint Force Support Functions

By: Josh Wallin and Carlton Haelig

September 30, 2026

<https://www.cnas.org/publications/reports/behind-the-front-line>

Commentary

Time to Confront Escalating Russia-Iran Intelligence Cooperation

Russia-Iran intelligence and technology cooperation is escalating. It's time for the United States to better prioritize confronting it.

Justin Sherman

September 30, 2026

<https://www.csis.org/analysis/time-confront-escalating-russia-iran-intelligence-cooperation>

Report

The Russia Stability Tracker

By: Andrea Kendall-Taylor

September 29, 2026

<https://www.cnas.org/publications/reports/the-russia-stability-tracker-sep26>

The Golden Dome for America Initiative

Missiles and drones have become weapons of choice. Missile defenses have, in turn, become foundational to deterrence and defense. The need to revolutionize our nation's approach to homeland air and missile defense capabilities is strategically necessary and long overdue.

Tom Karako

September 29, 2026

15 S.

https://csis-website-prod.s3.amazonaws.com/s3fs-public/2026-09/ts260929_Karako_Golden_Dome.pdf?VersionId=iKh02eYWBGQyvbl02UFAlke4ruo_Ob1v

Online Analysis

US defence cooperation in the Gulf since Trump's return

Albert Vidal Ribe

28th September 2026

<https://www.iiss.org/online-analysis/online-analysis/2026/09/us-defence-cooperation-in-the-gulf-since-trumps-return/>

Report

Building a multilateral cognitive warfare defense network: A collaborative framework for the United States, Japan, and Taiwan

Beijing is pressuring Japan, South Korea, Taiwan, and the Philippines not only with ships and aircraft but also in the cognitive domain—which no multilateral mechanism defends. This report explores what it would take to build a coordinated multilateral defense network to combat this threat across the first island chain.

By Yu-Hao “Vinson” Shen

Sep 23, 2026

24 S.

<https://www.atlanticcouncil.org/wp-content/uploads/2026/09/Building-a-multilateral-cognitive-warfare-defense-network-A-collaborative-framework-for-the-United-States-Japan-and-Taiwan.pdf>

Studies

Final Pieces of the Puzzle: Increasing Deterrence and Defense in NATO’s Northeast Quadrant

Katherine E. Dahlstrand, Casey Nicastro, Jan van Tol

September 23, 2026

116 S.

<https://csbaonline.org/wp-content/uploads/2026/09/CSBA-Report-Final-Pieces-of-the-Puzzle.pdf>

Backgrounder Defense

Countering Drones: Five Lessons from Ukraine for NATO’s Northeastern Flank

Annamaria Cantore

Third Secretary, Lithuanian Ministry of Foreign Affairs

September 22, 2026

12 S.

<https://www.heritage.org/sites/default/files/2026-09/BG3974.pdf>

AEIdeas

Military Munitions and Money

by Elaine McCusker, Richard Sims

September 18, 2026

<https://www.aei.org/foreign-and-defense-policy/military-munitions-and-money/>

Report

**Drones, Missiles, and the U.S. Munitions Shortage
The Role of Affordable Mass in a Taiwan Conflict**

By: Philip Sheers and Stacie Pettyjohn

September 18, 2026

<https://www.cnas.org/publications/reports/drones-missiles-and-the-u-s-munitions-shortage>

National Security

Report | CSIS

The Terrorism Threat to the 2026 Midterm Elections: What the Data Tells Us

Terrorists have targeted U.S. elections in each of the past several cycles, suggesting that similar violence around the 2026 midterm elections is possible. CSIS experts analyze the data to assess the potential threat.

Riley McCabe und Daniel Byman

September 29, 2026

13 Seiten

https://csis-website-prod.s3.amazonaws.com/s3fs-public/2026-09/260928_Byman_Terrorism_Threat.pdf?VersionId=BneyKhp4U1zA.zDShaxaFuiXN4Trdyv1

Report

The AGI Moment

Strategies and Recommendations for an Uncertain Future

By: Paul Scharre

September 21, 2026

28 S.

<https://s3.us-east-1.amazonaws.com/files.cnas.org/documents/Scharre-AGI-Moment-9.18.26-v2.pdf>

Foreign Policy

Article

Trump-Xi Summit Scorecard: Assessing the Results of the September Meeting

This scorecard reveals how the Trump administration traded long-term strategic leverage for temporary truces and diplomatic photo-ops during Chinese President Xi Jinping's visit to Washington, failing to secure meaningful wins on trade, AI,entanyl, and foreign policy.

Michael Clark, Jonathan Fritz

Oct 1, 2026

<https://www.americanprogress.org/article/trump-xi-summit-scorecard-assessing-the-results-of-the-september-meeting/>

Paper | via Brookings

Where does U.S. foreign assistance go from here?

Chidozie Ezi-Ashi, George Ingram and Homi Kharas

September 30, 2026

18 S.

https://cdn.prod.website-files.com/63764cef7a7aa503d5388f15/6abd1b24795883b6ed955add_Where%20does%20U.S.%20foreign%20assistance%20go%20from%20here.pdf

Policy Analysis

U.S.-Iran Dynamics Beneath the Stalemate

by Patrick Clawson

Sep 30, 2026

<https://www.washingtoninstitute.org/policy-analysis/us-iran-dynamics-beneath-stalemate>

Commentary

What did the Trump-Xi summit actually accomplish?

Brookings experts weigh in

Ryan Hass, Melanie W. Sisson, Yun Sun, Susan A. Thornton, Kari Heerman, Vanda Felbab-Brown, Jonathan A. Czin, Mireya Solís, Michael E. O'Hanlon, and Scott M. Moore

Updated: September 30, 2026

Originally published: September 29, 2026

<https://www.brookings.edu/articles/what-did-the-trump-xi-summit-actually-accomplish/>

Research Paper

The Scope and Nature of the U.S.-China Competition

NATIONAL DEFENSE RESEARCH INSTITUTE

This is the first of several reports in a RAND study on the U.S.-China competition. The authors provide a framework for evaluating the character and status of that competition and give insight into how the United States can gain strategic leverage.

Michael J. Mazarr, Amanda Kerrigan, Sam Plapinger, Jenna Murray, Gregory Weider Fauerbach, Habiba Ahmed, Benjamin Lenain, Marzia Giambertoni, Trevor Johnston, Tim McDonald, et al.

Sep 29, 2026

113 S.

https://www.rand.org/content/dam/rand/pubs/research_reports/RRA4200/RRA4254-2/RAND_RRA4254-2.pdf

Commentary

Takeaways from the Trump-Xi White House Summit

CSIS experts assess the outcomes of the Trump-Xi White House summit in September 2026 and what it means for the future of U.S.-China relations.

CSIS Scholars

September 28, 2026

<https://www.csis.org/analysis/takeaways-trump-xi-white-house-summit>

Event | Transcript | CSIS

Takeaways from the Trump-Xi Summit: The Economic Security Angles

CSIS experts discuss how economic security issues played out at the September 2026 Trump-Xi summit.

September 28, 2026

21 S.

https://csis-website-prod.s3.amazonaws.com/s3fs-public/2026-09/260929_Kennedy_Security_Angles.pdf?VersionId=5TmvVzHg2Fo.Rwj3UIDaTkEuI6VXhTNv

Heritage Lecture Global Politics

The Balkans Emerge as America's Energy Security Partner in Europe

Max Primorac

September 28, 2026

10 S.

<https://www.heritage.org/sites/default/files/2026-09/HL1351.pdf>

Article

How UN Ambassador Waltz Is Making the UN Great Again

Washington has simply stopped writing blank checks to bodies it considers unreformable.

By Fred Fleitz

September 25, 2026

<https://amgreatness.com/2026/09/25/how-un-ambassador-waltz-is-making-the-un-great-again/>

Article

Bosnia and Herzegovina: What Is the American People's Interest?

How President Trump can make the country a friend and partner.

Brian T. Kennedy and Joseph E. Schmitz

09.25.2026

<https://americanmind.org/salvo/bosnia-and-herzegovina-what-is-the-american-peoples-interest/>

Expert Take

Future of American Strategy

What Do Americans Want From U.S. Foreign Policy? A Dispatch From Maricopa County, AZ

The first in a series of posts on the Future of American Strategy Initiative's national outreach.

Rebecca Lissner

September 25, 2026

<https://www.cfr.org/articles/what-do-americans-want-from-u-s-foreign-policy-a-dispatch-from-maricopa-county-az>

Expert Insights

Xi Visit Redux: Safeguarding Against Chinese Communist Party Violence on American Soil

Piero A. Tozzi, Adam Savit, & Royce Hood

September 21, 2026

7 S.

<https://americafirstpolicy.com/wp-content/uploads/2026/09/Xi-Visit-Redux-Safeguarding-Against-Chinese-Communist-Party-Violence-on-American-Soil-1.pdf>

Report

America's Best Non-War Option to Finish Hizballah in Lebanon

Joel Rayburn

Sep 21, 2026

<https://www.hudson.org/national-security-defense/americas-best-non-war-option-finish-hizballah-lebanon-joel-rayburn>

Economics, Trade and Finance

Commentary

What is the debasement trade?

Robin Brooks

October 2, 2026

<https://www.brookings.edu/articles/what-is-the-debasement-trade/>

RealTime Economics

Lost in tabulation: Diverging US-China trade data point to tariff evasion

Gregory Auclair (PIIE)

October 2, 2026

<https://www.piie.com/blogs/realtime-economics/2026/lost-tabulation-diverging-us-china-trade-data-point-tariff-evasion>

Blog Post

Persistently Higher Treasury Yields Could Add Trillions to the Debt Over 10 Years

By Ryan Bourne and Nathan Miller

October 1, 2026

<https://www.cato.org/blog/persistently-higher-treasury-yields-could-add-trillions-debt-over-10-years>

Policy Brief | CSIS

Dismantling China's Supply-Chain Weapon

A Transatlantic Strategy for Critical Minerals

Joris Teer

September 2026

14 S.

<https://assets.cfr.org/images/Dismantling-Chinas-Supply-Side-Weapon-1/Dismantling-Chinas-Supply-Side-Weapon-1.pdf>

AEI Economic Perspectives

The Impact of Tariffs on the Cost of Capital in the US

Abstract This report incorporates tariffs' impact into the standard framework for estimating the cost of capital and the marginal effective tax rate (METR) on new investment in the US. Before the February 2026 Supreme Court...

Kyle Pomerleau + Thomas Brosy + Robert McClelland + et al.

30 Sep 26

25 S.

<https://www.aei.org/wp-content/uploads/2026/09/The-Impact-of-Tariffs-on-the-Cost-of-Capital-in-the-US.pdf?x10619>

Research Paper

Evaluation of U.S. Policies to Increase Domestic Access to Critical Minerals

The United States has launched a wide-ranging industrial policy effort to secure the domestic supply of critical minerals. In this report, the authors describe the relative strengths and weaknesses of several of the policy tools used in that effort.

Tom LaTourrette, Omar Aboulezz, Scott Behmer, Tom Blaubach

Sep 29, 2026

52 S.

https://www.rand.org/content/dam/rand/pubs/research_reports/RR5100/RR5195-1/RAND_RRA5195-1.pdf

RealTime Economics

Trump's trade war timeline 2.0: An up-to-date guide

Chad P. Bown (PIIE)

September 28, 2026

<https://www.piie.com/blogs/realtime-economics/2025/trumps-trade-war-timeline-20-date-guide>

Commentary

Trump Administration Ratchets Up Export Control Penalties

Penalties for export control violations are rising, while government-led training and outreach has slowed, making effective compliance programs more critical than ever. Pending legislation could raise fines even higher.

Kate Koren und Kevin Kurland

September 24, 2026

<https://www.csis.org/analysis/trump-administration-ratchets-export-control-penalties>

Research Paper

BPEA | Fall 2026

Demand-driven inflation

Conference Draft

Domenico Giannone and Giorgio Primiceri

September 23, 2026

54 S.

https://www.brookings.edu/wp-content/uploads/2026/09/5_GiannonePrimiceri.pdf

Research Paper

BPEA | Fall 2026

From importer to exporter: Oil shocks and the US economy

Conference Draft

Diego Känzig, James Stock, and Luca Zanotti

September 23, 2026

76 S.

https://www.brookings.edu/wp-content/uploads/2026/09/1_KanzigStockZanotti.pdf

Critical Questions

Project Vault Moves from Concept to Execution

Seven months after the United States announced Project Vault, the country's first strategic critical minerals reserve for commercial industry is beginning to take shape. On September 23, Glencore and Mercuria became the first two participants in VaultCo, the independently governed and run private company implementing Project Vault.

by Gracelin Baskaran

September 23, 2026

<https://www.csis.org/analysis/project-vault-moves-concept-execution>

Research

Tracking trade amid uncertain and changing tariff policies

Kari Heerman and Asha Patt

September 22, 2026

<https://www.brookings.edu/articles/tracking-trade-amid-uncertain-and-changing-tariff-policies/>

Report

Rethinking Export Controls as a Tool in Modern Technology Competition

Export controls can delay China's technological progress, but they cannot secure lasting U.S. leadership. This report examines the limits and costs of semiconductor controls and argues for pairing targeted restrictions with sustained investment in U.S. innovation.

Charles Wessner, Thomas Howell, und Sujai Shivakumar,
September 21, 2026
40 S.

https://csis-website-prod.s3.amazonaws.com/s3fs-public/2026-09/260921_Shivakumar_Export_Controls.pdf?VersionId=L913rAt_v0_KRSnjhEEzyv7raMjkaNrs

AEI Economic Policy Working Paper Series

Estimated Fiscal Reaction Functions and the Calculation of Sustainable Government Net Debt Limits for the US and 24 Other OECD Countries

by Mark J. Warshawsky
September 18, 2026
20 S.

<https://www.aei.org/wp-content/uploads/2026/09/OECF-Debt-Levels-Working-Paper-Final.pdf?x10619>

Blog Post

Congress Voted to Expand Presidential Tariff Power—Now It Owns What Comes Next

By Clark Packard, Alfredo Carrillo Obregon, and Eli DeLuca
September 18, 2026

<https://www.cato.org/blog/congress-voted-expand-presidential-tariff-power-now-it-owns-what-comes-next>

Domestic Politics

Commentary

Recent SCOTUS decisions threaten to uproot communities' voting power

Gabriel R. Sanchez, Keon L. Gilbert, and Rashawn Ray
October 1, 2026

<https://www.brookings.edu/articles/recent-scotus-decisions-threaten-to-uproot-communities-voting-power/>

Expert Insights

Policy Analysis in an Age of Technological and Social Transition: Four Futures and an Agenda for the Field

In this watershed moment for policy analysis driven by AI, which has eroded trust in experts and institutions, the field must revisit first principles and use them to guide institutional redesign, policy analysis training, and research governance.

Tim McDonald, Robert J. Lempert, Anita Chandra
Oct 1, 2026
21 S.

https://www.rand.org/content/dam/rand/pubs/perspectives/PEA5200/PEA5282-1/RAND_PEA5282-1.pdf

Blog Post

Libertarianism: Reports of Its Death Are Greatly Exaggerated

By Michael Chapman

September 28, 2026

<https://www.cato.org/blog/libertarianism-reports-its-death-are-greatly-exaggerated>

Blog Post

Legal Immigration from Majority-Muslim Nations Was Cut 96% Since 2024

By David J. Bier

September 28, 2026

<https://www.cato.org/blog/legal-immigration-majority-muslim-nations-was-cut-96-2024>

Article

The Trump Administration's Abandonment of the ILO Harms Workers Both at Home and Abroad

The Trump administration owes roughly \$300 million to the International Labour Organization, dealing a devastating blow to an international agency and leaving workers worldwide to bear the consequences.

Ryan Mulholland

Sep 28, 2026

<https://www.americanprogress.org/article/the-trump-administrations-abandonment-of-the-ilo-harms-workers-both-at-home-and-abroad/>

Report

Thomas Jefferson and the Problem of Political Toleration

Thomas Jefferson's efforts to censor the writings of David Hume represent a paradox in liberal thinking: a commitment to free speech coupled with anxiety about the danger of certain ideas to a free society.

Jay Cost

23 Sep 26

9 S.

<https://www.aei.org/wp-content/uploads/2026/09/Thomas-Jefferson-and-the-Problem-of-Political-Toleration.pdf?x10619>

Report

Previewing the 2026-2027 Supreme Court Term: Continuing the Rightward March

In its upcoming term, the Supreme Court will likely continue stripping civil rights from Americans while empowering the government and corporations to abuse them.

Devon Ombres

Sep 21, 2026

<https://www.americanprogress.org/article/previewing-the-2026-2027-supreme-court-term-continuing-the-rightward-march/>

Foresight

Kanada

Military Balance Blog

A procurement pivot? Canada's evolving defence partnerships

Canada is turning to non-US suppliers as it seeks to diversify its defence-industrial relationships, although some recent major procurement selections reflect the absence of clear US options. The effort to reduce reliance on US suppliers could nevertheless put Canadian industry participation in the US defence market at risk.

Rupert Schulenburg

23rd September 2026

<https://www.iiss.org/online-analysis/military-balance/2026/09/a-procurement-pivot-canadas-evolving-defence-partnerships/>