SWP-WebMonitor

Nordamerika

Nr. 17/2026, 16.10.2026 – 04.11.2026

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

Report | United States Study Centre
An era of confrontation and cooperation: Japan's crisis response in a new security landscape
byDirk Staunton
4 November 2026
https://www.ussc.edu.au/an-era-of-confrontation-and-cooperation-japan-s-crisis-response-in-a-new-security-landscape

Commentary
What Are U.S. Military Options in Iran?
As Washington weighs force against Tehran alongside ongoing negotiations and an economic blockade, CSIS's Benjamin Jensen evaluates six military options ranging from coercive diplomacy and targeted strikes to a prolonged sea control campaign and covert action.
by Benjamin Jensen
November 2, 2026
https://www.csis.org/analysis/what-are-us-military-options-iran

Report
Bridging Arctic Command Structure Seams to Support Allied Multi-Theater Defense
This report was finalized and submitted to the Homeland Defense Institute in May 2026. It was published in October 2026 without revisions and does not take into account developments that occurred between the submission and publication dates.
By Sophie Arts and Jana Ondrášková

May 2026
33 S.
https://www.gmfus.org/sites/default/files/2026-10/261020_Bridging%20Arctic%20Command%20Structure%20V3.pdf

RealTime Economics
Why generals need economists to win long wars
Elina Ribakova (PIIE)
October 30, 2026
https://www.piie.com/blogs/realtime-economics/2026/why-generals-need-economists-win-long-wars

Report | CSIS
Fast Following: Military Emulation and Twenty-First-Century Transformation
Modern war is a contest of learning and adaptation, and the lessons travel in a matter of weeks. Fast following, or copying, improving, and fielding proven innovations at speed, is now a core competency, yet Western militaries remain slow to build it.
by Mick Ryan
October 29, 2026
28 S.
https://csis-website-prod.s3.amazonaws.com/s3fs-public/2026-10/261029_Ryan_Fast_Following.pdf?VersionId=aM7UAJP5Ugo3JFKzuOUqs.s7VmbRBlgT

Policy Report | CFR
Europe's Defense Dilemma
How to Prepare for a Future Without American Protection
Fix and Fiott argue that Europe has three options to prepare for a future of limited or conditional U.S. support: It can hope for a more European NATO, develop an EU-based defense union, or create a more flexible European defense coalition of the willing to deter against Russia and absorb future shocks to the transatlantic relationship.
Liana Fix and Daniel Fiott
October 2026
24 S.
https://assets.cfr.org/images/Europes-Defense-Dilemma_Oct29-3/Europes-Defense-Dilemma_Oct29-3.pdf

Commentary
FY 2027 Defense Funding: Potential Post-Midterm Outcomes
Congress has a full post-midterm agenda, with action needed to fund the Department of Defense and federal government and reconciliation legislation to consider. Seamus Daniels lays out the factors that will shape FY 2027 defense funding decisions after the midterms.

by Seamus P. Daniels
October 28, 2026
https://www.csis.org/analysis/fy-2027-defense-funding-potential-post-midterm-outcomes

Research Report
Anticipating Allies' Responses to U.S. Retrenchment from Europe: How France, Germany, Poland, and the United Kingdom Might Adapt to Alternative U.S. Approaches
The authors of this report examine how four key NATO allies are likely to respond to U.S. retrenchment from Europe and how the United States can maintain a partnership with Europe while reducing the U.S. military role there.
Miranda Priebe, Stephanie Pezard, Anna M. Dowd, James Black, Paul van Hooft, Clara de Lataillade, Zachary Burdette, Daniel Cebul, Nathaniel Edenfield, Scott Behmer
Oct 28, 2026
130 S.
https://www.rand.org/content/dam/rand/pubs/research_reports/RRA5000/RRA5006-1/RAND_RRA5006-1.pdf

Research Article
Approving the US-Saudi nuclear deal while reducing proliferation risks
Robert Einhorn
October 26, 2026
https://www.brookings.edu/articles/approving-the-us-saudi-nuclear-deal-while-reducing-proliferation-risks/

Report | CNAS
Charting the New Nuclear Age
Scenarios for the Two-Nuclear-Peer Challenge
By: Stacie Pettyjohn, Carlton Haelig and Natasha Lander Finch
October 22, 2026
32 S.
https://s3.us-east-1.amazonaws.com/files.cnas.org/documents/Charting-the-New-Nuclear-Age_Defense_2026_Final.pdf

Research Report
Towards a new framework for nuclear deterrence in Europe: European perceptions of Russian nuclear policy and the role of the UK and France in NATO's nuclear posture
This study explores European NATO Allies' views of Russian nuclear policy and the role of the UK and France in NATO's nuclear posture, and it sets out six conceptual questions to guide discussions of a future nuclear deterrence framework in Europe.
Artur Honich, Thomas Kenchington, Ondrej Palicka
Oct 22, 2026

93 S.
https://www.rand.org/content/dam/rand/pubs/research_reports/RRA3900/RRA3964-1/RAND_RRA3964-1.pdf

Reports & Papers | via Belfer
Countering Drone Proliferation from Russia's War Against Ukraine: Implications for Arms Control and Security Governance
Dominika Kunertova
Oct. 21, 2026
16 S.
https://www.sipri.org/sites/default/files/2026-10/eunpdc_no_102.pdf

Article
Middle East Conflicts Exacerbate Transatlantic Differences, Highlight Alliance Solidarity Problem
As if there were not enough differences between much of Europe and Washington, they rose to new levels after President Trump launched military operations against the Iranian regime on February 28.
By: Matt Boyse
October 21, 2026
https://www.hoover.org/research/middle-east-conflicts-exacerbate-transatlantic-differences-highlight-alliance-solidarity

Report
The European Union as a compound power in Cold War 2.0
Contrary to the prevailing narrative, the European Union has the economic power and strategic vision to act as a credible major power. Willingness to act is the missing piece.
By Piotr Arak and Velina Tchakarova
Oct 20, 2026
50 S.
https://www.atlanticcouncil.org/wp-content/uploads/2026/10/the-european-union-as-a-compound-power-in-cold-war-2.0-2.pdf

Report
Reshaping Defense: Secretary Hegseth's Latest Initiatives, Point by Point
The Pentagon has announced seven initiatives shaping drone acquisition, "legacy" systems procurement, supply chains, officer commissioning, senior officer management, and base operations. Some have bipartisan support; some face opposition; all face a long process.
by Mark F. Cancian
October 20, 2026
https://www.csis.org/analysis/reshaping-defense-secretary-hegseths-latest-initiatives-point-point

Post | Foreign and Defense Policy
Important Asia Provisions in the House and Senate 2027 National Defense Authorization Act
by Zack Cooper, Noah Burke
October 15, 2026
https://www.aei.org/foreign-and-defense-policy/important-asia-provisions-in-the-house-and-senate-2027-national-defense-authorization-act/

Issue Brief
Measuring Europe's rearmament: A year of the Defence Readiness Roadmap 2030
One year since the EU debuted its "Defence Readiness Roadmap," with forty-five milestones Europe must meet to take responsibility for its own defense by 2030, is the EU on track?
By Eva Mulholland, Aurélie Vittot
Oct 15, 2026
https://www.atlanticcouncil.org/in-depth-research-reports/issue-brief/measuring-europes-rearmament-a-year-of-the-defence-readiness-roadmap-2030/

Transcript | CSIS
The Future of U.S.-UK Defense Cooperation with UK Secretary of Defence Wes Streeting
CSIS Europe, Russia, and Eurasia Program hosted a conversation with UK Secretary of State for Defence Wes Streeting on how both countries can keep deterrence credible in Europe and beyond.
October 15, 2026
12 S.
https://csis-website-prod.s3.amazonaws.com/s3fs-public/2026-10/261015_Streeting_Future_US.pdf?VersionId=qzDHftFM3yJUfeJVfWmiJ_6qNt2MtnZd

National Security

Reports & Papers
A Pre-mortem on The First Major AI-Enabled Terrorism Event and The Choices That Could Enable it: Plus 9 Predictions
Frontier AI developers' model reports and the dedicated risk-assessment teams at governmental AI institutes such as UK AISI and US CAISSI now treat a major AI-enabled cyber, biological, or chemical terror event as a credible concern. But how, precisely, might such an event happen? What choices across the model lifecycle may contribute to it? This paper studies what current evidence suggests about how specific mistakes from AI developers, distributors, and governments may contribute to such an event.
Max Kamachee, Jordi Weinstock, Antonia Juelich, Jonas Raedler, Elise Racine, Stephen Casper
Oct. 15, 2026
50 S.

https://www.belfercenter.org/sites/default/files/2026-10/A-Premortem-on-AI-Enabled-Terr-PDF-2.1.pdf

Foreign Policy

Research Article
How the United States uses multilateral channels for its aid
A comparison with other large donors
Homi Kharas
November 2, 2026
https://www.brookings.edu/articles/multilateral-aid-united-states-donor-comparison/

Memo
Grenzen wirtschaftlicher -Anreize: Warum eine Einigung mit Iran schwierig bleibt
Die USA wollen Iran mit wirtschaftlichem Druck zu Zugeständnissen zwingen.
Dr. David Jalilvand
29. Okt. 2026
4 S.
https://dgap.org/system/files/article_pdfs/DGAP%20Memo_Nr-40_OKT-2026_4S-COVER.pdf

Heritage Lecture Global Politics
A World of Independent Nations
National sovereignty and transatlantic cooperation are not opposing principles. Properly understood, sovereignty is the necessary foundation for durable cooperation among free nations. A strong Atlantic alliance does not require political absorption, supranational government, or bureaucratic centralization. It requires self-governing nations that know who they are, defend their borders, honor their commitments, protect ordered liberty, and cooperate voluntarily where their interests and principles coincide.
Paul McCarthy
Senior Research Fellow, Margaret Thatcher Center for Freedom
October 29, 2026
9 S.
https://www.heritage.org/sites/default/files/2026-10/HL1353.pdf

Policy Brief | Hoover Institution
Recalibrating Selective Engagement in US-Africa Relations
This policy brief examines how the United States can better align diplomatic, commercial, security, development, and educational tools with the priorities and institutional conditions of African partners. Focusing on the Democratic Republic of the Congo, Nigeria, and Djibouti, it develops a framework for more coherent, context-sensitive engagement that strengthens long-term partnerships,

improves policy coordination, and produces more durable strategic and developmental outcomes for both sides.
October 29, 2026
By: Gift Iyioku
16 S.
https://hoover-s3-website.s3.us-west-2.amazonaws.com/s3fs-public/research/docs/Iyioku_RecalibratingSelective_web-261027.pdf

Expert Insights
Why Europe's Violent Protests Matter for the American Interest
Kristen Ziccarelli - Fellow, Civilizational Action
October 28, 2026
https://americafirstpolicy.com/issues/why-europes-violent-protests-matter-for-the-american-interest/

Post | Foreign and Defense Policy
A Requiem for Ukraine—and America
by Kori Schake
October 23, 2026
https://www.aei.org/foreign-and-defense-policy/a-requiem-for-ukraine-and-america/

Reports
America and Europe: A Blueprint for the Next Chapter
Peter Rough & Ulrich Speck
Oct 21, 2026
https://www.hudson.org/foreign-policy/america-europe-blueprint-next-chapter-peter-rough-ulrich-speck

Issue Brief China
Time Bought, Leverage Preserved: Outcomes of the Trump–Xi Summit in Washington
Andrew Harding
October 16, 2026
11 S.
https://www.heritage.org/sites/default/files/2026-10/IB5420.pdf

AEIdeas
America Remained the Un's Largest Funder in 2025 Despite Deep Cuts
by Brett D. Schaefer
October 15, 2026

https://www.aei.org/foreign-and-defense-policy/america-remained-the-uns-largest-funder-in-2025-despite-deep-cuts/

Expert comment
Why the US midterms are a rare foreign policy election
US voters are linking economic concerns to the Trump administration's foreign policy choices. This is bad news for Republicans.
Dr Andrew Payne
15 October 2026
https://www.chathamhouse.org/2026/10/why-us-midterms-are-rare-foreign-policy-election

Economics, Trade and Finance

Policy Brief
It is time to revisit the Santiago Principles on sovereign wealth funds
Adnan Mazarei (PIIE) and Edwin M. Truman (Harvard Kennedy School)
November 2026
15 S.
https://www.piie.com/sites/default/files/2026-11/pb26-19.pdf

Working Papers
Long-term projections of the world economy
Weifeng Larry Liu (Reserve Bank of Australia) and Warwick J. McKibbin (PIIE; Australian National University)
October 2026
62 S.
https://www.piie.com/sites/default/files/2026-10/wp26-16.pdf

Insights
What Mini Trade Deals Tell Us About the Future of US-EU Trade
The deals underpin transatlantic economic cooperation.
Penny Naas, Antonia Wunnerlich
October 30, 2026
https://www.gmfus.org/news/what-mini-trade-deals-tell-us-about-future-us-eu-trade

Critical Questions
The FCC Covered List: National Security, Economic Policy, and Technology Supply Chains
The FCC's Covered List has expanded beyond specific high-risk suppliers to restrict entire categories of foreign-produced technology. What does this shift mean for U.S. national security, domestic businesses, and global technology supply chains?

by Matt Pearl and Kuhu Badgi
October 26, 2026
https://www.csis.org/analysis/fcc-covered-list-national-security-economic-policy-and-technology-supply-chains

Blog Post
Trump Equity Portfolio Hits 40—Democrats Have Plans for It
Yesterday, the Commerce Department announced equity stakes in four more private companies. That brings the total to 40 announced or completed ownership deals by the Trump administration, which can be viewed in the Government Ownership Dashboard on Cato's new Restoring Free Enterprise site.
By Tad DeHaven
October 23, 2026
https://www.cato.org/blog/trump-equity-portfolio-hits-40-democrats-have-plans-it

Commentary
Do we finally agree on overcapacity? Now what?
Kari Heerman
October 22, 2026
https://www.brookings.edu/articles/do-we-finally-agree-on-overcapacity-now-what/

Econographics
The rewiring of globalization is under way
Global supply chains are being reconfigured in response to geopolitical and economic upheaval. This is a more nuanced picture than the term "deglobalization" suggests.
By Hung Tran
Oct 20, 2026
https://www.atlanticcouncil.org/blogs/econographics/the-rewiring-of-globalization-is-under-way/

Hutchins Center Working Paper # 117
The Case for an Elastic Reserves System: Recommendations for the Federal Reserve's
Chris Hughes
Oct 19, 2026
40 S.
https://www.brookings.edu/wp-content/uploads/2026/10/WP117_Hughes_formatted.pdf

Economics Working Papers | Hoover Institution
A Network Approach to Geopolitics

We develop a tractable framework for analyzing geopolitics as a network of coordination and strategic influence. Countries choose geopolitical actions that trade off domestic interests against incentives to align with connected countries. They can exert costly bilateral influence to affect one another's actions. We characterize equilibrium actions and bilateral influence in closed form. Cross-country differences in domestic interests decompose into latent geopolitical cleavages, each of which the network transmits into geopolitical actions independently of the others. The cross-country covariance matrices of domestic interests and of geopolitical actions identify the cleavages and their importance, from which we recover the network. We implement the framework using data on United Nations voting and democratic orientation. The inferred network is well approximated by a few dimensions, aligns with external measures of geopolitical ties, and recovers well-known historical cleavages. We undertake counterfactuals for domestic interests and network connections and quantify three notions of geopolitical power.
By: Stephen Redding, Ernest Liu, Bennett Smith-Worthington, David Y. Yang
October 16, 2026
46 S.
https://hoover-s3-website.s3.us-west-2.amazonaws.com/s3fs-public/research/docs/26127-Redding%20et%20al.pdf

Domestic Politics

Report | Social, Cultural, and Constitutional Studies
Is There a Statesman in the House?
by Steven B. Smith
November 03, 2026
35 S.
https://www.aei.org/wp-content/uploads/2026/11/Is-There-a-Statesman-in-the-House.pdf?x43302

Report
Tracking the Return on Investment of Trump's Backers
The individuals and entities who financially supported President Trump's political operations and personal projects have reaped immense benefits through his administration's actions since his return to office.
Devon Ombres, Ryan Koronowski, Will Ragland, Jacqueline Lewis
Nov 2, 2026
https://www.americanprogress.org/article/tracking-the-return-on-investment-of-trumps-backers/

Report
Domestic Discretionary Programs Have Been Dramatically Cut in Recent Years
A crucial part of the federal budget has atrophied over the past three years, threatening programs that are critical to Americans' well-being.

Bobby Kogan, Jiun Park
Oct 29, 2026
https://www.americanprogress.org/article/domestic-discretionary-programs-have-been-dramatically-cut-in-recent-years/

Issue Brief
The H-1B Program Needs Radical Reform to Protect American Workers
Julie Kirchner - Director, Homeland Security & Immigration Policy
October 28, 2026
26 S.
https://americafirstpolicy.com/wp-content/uploads/2026/10/The-H-1B-Program-Needs-Radical-Reform-to-Protect-American-Workers.pdf

Commentary
How dirty tricks harm, and institutional safeguards protect, the integrity of US elections
Elaine Kamarck and Darrell M. West
October 28, 2026
https://www.brookings.edu/articles/how-dirty-tricks-harm-and-institutional-safeguards-protect-the-integrity-of-us-elections/

Articles
Ten Poll Numbers That Explain the 2026 Midterm Elections
Recent polling shows why Democrats think that Election Day could put them back in charge of Congress.
James M. Lindsay
October 27, 2026
https://www.cfr.org/articles/ten-poll-numbers-that-explain-the-2026-midterm-elections

Expert Take
How Do Americans View Foreign Policy Ahead of the Midterms?
A Dispatch From Kenosha and Milwaukee Counties, Wisconsin
An aerial view of the Milwaukee skyline.
Rebecca Lissner
October 27, 2026
https://www.cfr.org/articles/how-do-americans-view-foreign-policy-ahead-of-the-midterms

Blog Post
The White House Council of Economic Advisers' Imaginary Cost of Illegal Immigrants
By David J. Bier
October 23, 2026

https://www.cato.org/blog/white-house-council-economic-advisers-imaginary-cost-illegal-immigration

Commentary
The midterm effect: What the 2026 election could mean for public policy
Loren Adler, Matthew Fiedler, Scott R. Anderson, Bill Baer, Sarah A. Binder, William A. Galston, Ryan Hass, Elaine Kamarck, Aaron Klein, Anisha Singhal, Michael E. O'Hanlon, Gabriel R. Sanchez, Nicol Turner Lee, Jon Valant, David G. Victor, Darrell M. West, Russell Wheeler, and Tom Wheeler
October 22, 2026
https://www.brookings.edu/articles/the-midterm-effect-what-the-2026-election-could-mean-for-public-policy/

Blog Post
A Libertarian Warned of the New Right's Authoritarianism 40 Years Ago—Today's National Conservatives Are Proving Him Right
By Michael Chapman
October 22, 2026
https://www.cato.org/blog/libertarian-warned-new-rights-authoritarianism-40-years-ago-todays-national-conservatives-are

Quincy Policy Note
The Cost of the Iran War to American Farmers
Hadi Kahalzadeh
October 21, 2026
4 S.
https://quincyinst-2.s3.amazonaws.com/wp-content/uploads/2026/10/20134701/QI-POLICY-NOTE-NO-30-KAHALZADEH.pdf

Research Article
DOGE's impact in Indian Country: Nearly $470 million in lost funding
Robert Maxim, Glencora Haskins, Mary Elizabeth Campbell, and Ryan Williams
October 16, 2026
https://www.brookings.edu/articles/doge-funding-cuts-indian-country/

Foresight

Kanada

Opinion
Chasing Gryphons: The Myth of Independence from US Defence Technology
Col (Ret'd) Charles Davies
November 3, 2026
https://cdainstitute.ca/chasing-gryphons-the-myth-of-independence-from-us-defence-technology/

Policy Brief
Canada's Latest Attempt at Lawful Access: It's Time to Get This Right
The Lawful Access Act, Bill C-22 in Canada, marks the tenth attempt to establish a framework that, among other things, addresses barriers to investigations in the digital environment. However, it's still not getting it entirely right. CIGI Senior Fellow Leah West calls for targeted amendments to the bill to better protect privacy, cybersecurity and human rights.
The bill would allow law enforcement to begin a process to obtain judicial authorization to compel electronic service providers to produce information related to Canadians' online and telecommunications activities, including information that can be used to identify the user. To effectively investigate and prosecute crime in our quickly evolving digital world, there must be a balance; in this policy brief, West details "adequate safeguards to prevent law enforcement from engaging in unreasonable fishing expeditions, to prevent foreign governments from accessing Canadian-based information to further repressive or political ends, and to prevent data retention and interception capabilities from posing a substantial risk to the privacy of Canadians."
Leah West
October 30, 2026
12 S.
https://www.cigionline.org/documents/4008/PB_no.245_Leah_West.pdf

Policy Papers
Explosive Threats and Civil Preparedness: What Canada and the Nordics Can Learn from Ukraine
This paper argues that civil preparedness planning should draw more systematically on humanitarian mine action by treating demining and risk education as resilience capabilities, preparing nationwide responses to explosive threats, investing in specialized civilian skills before crises, and safeguarding the legal distinction between civilian and military functions. It also provides policy recommendations grounded in lessons learned in Ukraine and beyond by actors working in humanitarian mine action and in the humanitarian sector at large.
Giacomo Cuscunà, Dr. Henrique Garbino & Dr. Priscyll Anctil Avoine
October 20, 2026
21 S.
https://cdainstitute.ca/wp-content/uploads/2026/10/Policy-Paper-Oct-2026.pdf

POLICY PERSPECTIVE | CGAI

Canada, Turkey and the Terms of a Defence Reset
by Tolga Demiryol
October 2026
11 S.
https://assets.nationbuilder.com/cdfai/pages/17967/attachments/original/1792431186/2026_CGAI_Policy_Perspective_-_Canada__Turkey_and_the_Terms_of_a_Defence_Reset.pdf?1792431186