

# Building Resilience through a Made in America Industrial Strategy

Made in America Office  
Office of Management and Budget  
The White House

January 2025

President Biden and Vice President Harris committed to make “Made in America” a reality and they have delivered. In his first week in office, President Biden signed an *Executive Order on Ensuring the Future is Made in All of America by All of America’s Workers* which established the first ever [Made in America Office \(MIAO\)](#) at the White House Office of Management and Budget (OMB) and launched a whole-of-government initiative to support American manufacturing. The President and Vice President secured historic legislation to strengthen “Made in America” even further — including enacting legislation the last administration failed to pass — and implemented the most robust change to the Buy American Act in almost 70 years to ensure that taxpayer money is supporting workers and manufacturing across America. Since then, Federal agencies are using Buy America laws to support the domestic build-out of industries, resilient supply chains, and critical components and inputs.

## *THE BIDEN-HARRIS MADE IN AMERICA AGENDA*

The investments of the Bipartisan Infrastructure Law, the Inflation Reduction Act, and the CHIPS and Science Act puts the United States, our industries, and our workers, on a strong footing to compete globally. Investing in our workers, investing in our infrastructure, and investing in innovation, are all investments in our future.

The Biden-Harris Investing in America agenda is a Made in America agenda. Domestic content requirements have existed for decades, but the laws were piecemeal and inconsistent. The lack of consistent requirements for Federal financial assistance created uncertainty for firms and hindered market opportunities. This changed under the Biden-Harris Administration. The *Bipartisan Infrastructure Law* put Americans to work rebuilding our nation with American-made materials. It also included the *Build America, Buy America Act*, which requires that all iron, steel, manufactured products, and construction materials used in Federally funded infrastructure projects are produced domestically. The *CHIPS and Science Act* is making the United States once again a world leader in manufacturing semiconductors that power our lives. The *Inflation Reduction Act* is powering a [manufacturing revolution](#)<sup>1</sup> in clean energy industries of the future.

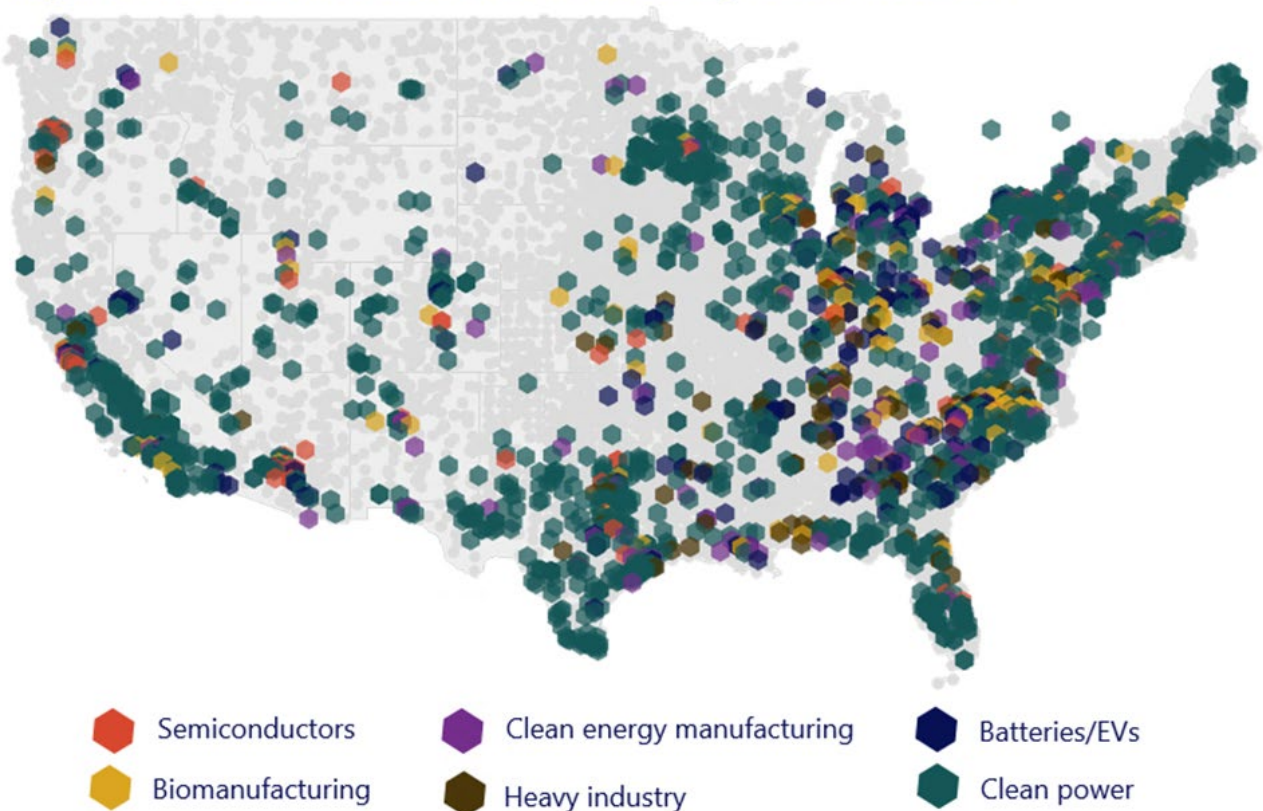
When President Biden and Vice President Harris took office, an estimated average of \$59 billion of Federal financial assistance for infrastructure was covered by Buy America requirements, which applied primarily to Department of Transportation (DOT) programs and Environmental Protection Agency (EPA) water infrastructure projects. After enactment of the Build America Buy America an estimated average of \$324 billion in Federal funding is now covered by domestic content requirements – a fivefold increase – demonstrating President Biden’s

commitment to American workers and manufacturing. When President Biden took office, the domestic content requirements for federal procurement was 55 percent. Because of actions taken by the Biden-Harris Administration, the threshold is now 65 percent and will increase further to 75 percent in 2029.

The Biden-Harris Administration is leveraging federal dollars to support American manufacturing, deploying supply and demand-side tools to support a broad-based industrial strategy, and working with agencies to engage early with industry to signal market and industrial opportunities.

Strategic public investments in American manufacturing, infrastructure, and clean energy are revitalizing the nation’s manufacturing leadership and helping drive [steady and stable](#)<sup>2</sup> economic [growth](#)<sup>3</sup> across the country. The President’s approach revives [a powerful tradition of public investment](#)<sup>4</sup> which has now [positioned](#)<sup>5</sup> the United States to be competitive in key industries of the future. This government-enabled, private-sector-led approach contributed to the economy [outpacing](#)<sup>6</sup> economists’ [expectations](#)<sup>7</sup> and is [crowding in](#)<sup>8</sup> private capital to critical sectors.

**Figure 1. Private Investments in Industry, 2021-Present**



**Council of Economic Advisors**

Source: Invest.gov.

As of November 25, 2024.

The Biden-Harris Administration has taken historic action to strengthen Made in America laws and policies.

- **[Strengthening Buy American Requirements](#)<sup>9</sup>**: In 2022, the Biden-Harris Administration [announced](#)<sup>10</sup> the most robust updates to the implementation of the Buy American Act in nearly 70 years and increased the domestic content requirements for Made in America for Federal procurement from 55 percent of the value of their component parts that are manufactured here to a threshold of 60 percent in 2022, 65 percent in 2024, and 75 percent in 2029. The Biden-Harris Administration also announced new Buy America requirements for lumber, glass, fiber optic cables, and other [construction materials](#)<sup>11</sup> used in federal infrastructure projects to be made in America.
- **[Signing Build America, Buy America Act](#)<sup>12</sup>**: The “Build America Buy America Act”, which president Biden signed in November 2021, as part of the Bipartisan Infrastructure Law, established domestic content preferences for all Federal financial assistance for all Federally financed infrastructure.
- **[Closing Loopholes in Made in America Policies](#)**: The Department of Transportation published a [final rule](#) to discontinue a sweeping Reagan-era Buy America waiver for manufactured products in federal-aid highway projects. This action closed a giant loophole and further advance the President and Vice President’s commitment to support American manufacturers and good-paying jobs across the United States and support the growth of domestic manufacturing. In addition, the Federal Acquisition Regulation (FAR) Council, in consultation with OMB’s Made in America Office and Office of Federal Procurement Policy, [proposed a rule](#)<sup>13</sup> to update the list of domestically non-available articles. The rule proposed to remove 70 articles from the list, which would result in the shortest list in history. This action encourages agencies to conduct further market research to find domestic sources and incentivizes domestic producers to invest in manufacturing the removed articles.
- **[Building Trust, Improving Transparency](#)<sup>14</sup>**: Established new processes through OMB to improve oversight of agency Buy America and Buy American waivers and transparency of the waiver process through the establishment of [MadeinAmerica.gov](#).
- **[Fully leveraging Procurement Authorities](#)<sup>15</sup>**: OMB issued guidance to agencies to [better leverage](#)<sup>16</sup> Federal procurement and Federal financial assistance to strengthen domestic sourcing for critical products and supply chains. This includes action in furtherance of the President’s directive to develop enhanced price preferences and better leverage industrial mobilization authority to support American manufacturing. These actions will allow agencies to manage and mitigate supply chain risks as well as take a targeted approach to support competition and combat harm to domestic industries as a result of subsidies from non-market economies. Targeted sectors include recently announced actions on semiconductors and personal protective equipment (PPE).
  - **[Incentivize Use of Domestically Manufactured Semiconductors](#)<sup>17</sup>**: OFPP, MIAO and the Office of the Federal Chief Information Officer (OFCIO) [issued guidance](#) to help the Federal Government – the world’s largest buyer – organize its demand for domestic semiconductors. This effort includes agencies developing strategies to dual or multiple source semiconductors, increasing transparency for critical infrastructure supply chains, and providing the government’s demand for the products and services that use these chips. This action follows the [Request for Information \(RFI\)](#)<sup>18</sup> issued by MIAO and OFPP to

seek feedback from industry on the best ways to incentivize the use of domestically manufactured semiconductors, and how the Federal Government can build and maintain this essential capability through the procurement of domestic commercial IT end products.

- [HHS PPE Payment Adjustments<sup>19</sup>](#): HHS implemented a payment adjustment program to offset the additional marginal costs that hospitals incur in purchasing domestic N95 surgical masks in 2023. This program seeks to support a resilient and reliable supply of domestic surgical N95 masks. Following stakeholder outreach, HHS issued a Request for Information in July 2024, seeking feedback on potential modifications. These modifications will enhance adoption and support the policy goal of maintaining a domestic production capacity for high-quality PPE. HHS is also exploring follow on actions to further support the domestic PPE industry.
- [Signing Invent it Here Make it Here EO<sup>20</sup>](#): The President’s *Executive Order on Federal Research and Development in Support of Domestic Manufacturing and United States Jobs* furthers America’s policy of “invent it here, make it here”—benefitting American workers, communities, and global supply chain resilience. The EO boosts the incentive to manufacture subject inventions in the United States when those inventions are developed using Federal funds, which in turn **encourages the expansion of domestic production for critical industries**. As a result, when new inventions that are developed through taxpayer dollars are commercialized, American workers, manufacturing, and American ingenuity all benefit.

Under President Biden and Vice President Harris, businesses are building factories that will power our economy for years to come. There has been historic private sector investment, building on historic actions by the Biden-Harris Administration that are making “Made in America” a reality. The private sector has committed over [\\$1 trillion<sup>21</sup>](#) in investments in American manufacturing and our power sector, including sectors central to our [industrial strength<sup>22</sup>](#). Inflation-adjusted manufacturing construction spending has more than [doubled<sup>23</sup>](#) since January 2021—with the highest contribution to economic growth on record since 1980 after falling under the previous administration. Since January 2021, the United States has created over 1.4 million manufacturing and construction jobs whereas the prior administration lost manufacturing jobs.

- These investments will [drive innovation<sup>24</sup>](#) and productivity that foster American economic competitiveness and energy security, while delivering good jobs and benefitting communities across the country. This also strengthens our nation’s infrastructure, so investing in the United States is more attractive to companies worldwide. These investments also help bring down the costs of key technologies, benefitting American workers, businesses, and families.

#### *LEVERAGING FEDERAL DOLLARS TO BUILD RESILIENT SUPPLY CHAINS*

MIAO, alongside Federal agencies, works to leverage federal purchasing tools to bolster the resilience of strategic sectors<sup>25</sup> and supply chains. The United States is investing in building out manufacturing capacity across key technologies and industries. At the same time, targeted procurement, federal financial assistance (FFA), and domestic content requirements can be

powerful tools to support American industrial capabilities, good jobs, and innovation. Made in America is a critical piece of our industrial strategy toolkit to strengthen supply chains and support manufacturing sectors critical to our economic and national security.

Through engagement and market signaling, Federal dollars are being leveraged to draw investment and good-paying jobs to the United States. Some of these investments are made possible because the Federal Government took action to strengthen Made in America laws and policies. Prioritizing action at the outset of program design and planning alongside engagement in supply chain mapping and industry engagement, supports the strategic leveraging of Buy America laws and supports the buildout of new industries and domestic supply chains where they did not previously exist. [Invest.gov](#) highlights this by sector and geography.

Agencies are [incorporating industrial considerations](#)<sup>26</sup> and demand forecasting into grant program design and planning and using innovative procurement tools to address unfair trade and nonmarket policies and practices by foreign competitors. MIAO is working with agencies to leverage the tools available, including the strategic use of American manufacturing plans, to phase in domestic content requirements where existing production does not meet Buy America requirements. Establishing clear and consistent criteria with achievable timelines supports an organized demand signal for critical industries. These include:

- [Broadband](#)<sup>27</sup>
- [Port equipment and infrastructure](#)<sup>28</sup>
- [Water infrastructure components](#)<sup>29</sup>
- [Forgings and castings](#)<sup>30</sup>
- [Shipbuilding](#)<sup>31</sup>
- [Heat pumps](#)<sup>32</sup>
- [High speed rail](#)<sup>33</sup>
- [Renewable energy](#)<sup>34</sup>
- [EV charging](#)<sup>35</sup>
- [Transformers](#)<sup>36</sup>
- [Personal Protective Equipment \(PPE\) and textiles](#)<sup>37</sup>
- [Buy Clean \(construction materials such as steel, cement/concrete, asphalt, and flat glass\)](#)<sup>38</sup>
- [Semiconductors](#)<sup>39</sup>

#### *CONDUCTING SUPPLY AND DEMAND-SIDE ANALYSIS TO SUPPORT SCALE-UP*

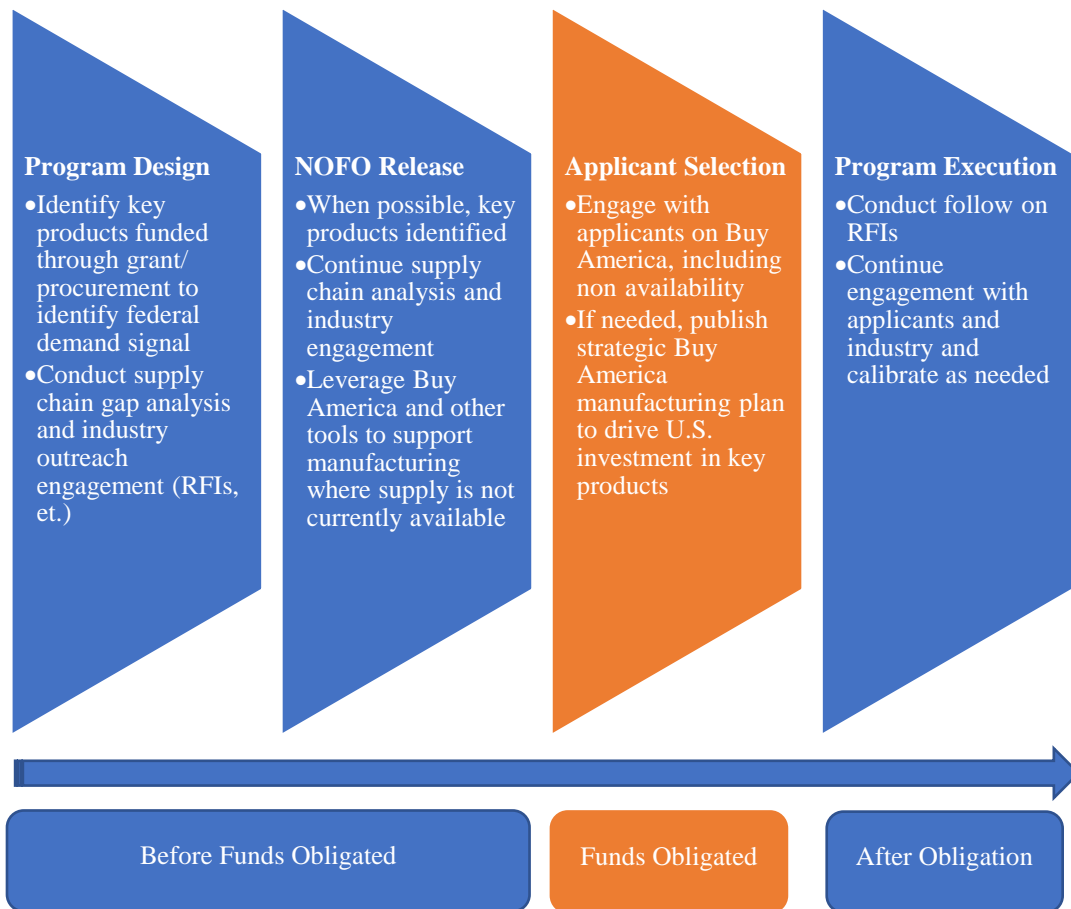
The Made in America Office supports interagency efforts to aggregate and coordinate demand across the Federal enterprise. This supports a strong demand signal to domestic manufacturers about the Federal demand for specific products. MIAO works in coordination with Federal agencies to identify key products that will be purchased across both federal financial assistance and procurement, analyze the timeline of expected demand for these products, investigate relevant supply chains and potential supply constraints, and work collaboratively to build resilient domestic supply chains.



## Analyze Expected Federal Demand

Identifying key products associated with investments grant recipients are expected to make provides important insights for industry and government and supports opportunities for US manufacturers. Through [updated guidance](#)<sup>40</sup>, agencies are working to do just that, gathering key product information early, identifying domestic sourcing constraints based on market research and then taking action to support the buildout of domestic manufacturing where opportunities exist.

**Table 1: Leveraging Federal Funding to Support Strategic Supply Chains - Key Steps**



Often, grant recipients will purchase and install products long after a grant notice of funding opportunity (NOFO) is issued. Critically, this provides industry time to adjust and ramp up to meet market demands. Identifying key products during the program and NOFO phase, supports a strong demand signal, supports transparency and ensures visibility for all market participants, including our small businesses.

## *INTEGRATING FEDERAL FUNDING, MARKET ANALYSIS AND POLICY TOOLS*

Made in America policy is an important tool for spurring investments across a variety of sectors, from city infrastructure to nanoscale semiconductors. Federal investments in infrastructure, including those funded through the Bipartisan Infrastructure Law, are subject to the Build America, Buy America Act, which requires iron, steel, manufactured products and construction materials used in infrastructure projects to be produced in the United States. To provide the best possible information to domestic manufacturers, Federal agencies have collaborated to identify supply chain constraints for anticipated Federal demand and estimate the timeline of the expected supply of key products and components. These analyses allow for the evaluation of broader market opportunities across multiple agencies, rather than simply assuming the static state of an industry. The following examples demonstrate the promise of the Biden Harris Administration's Made in America policies.

### **Broadband Development and Deployment**

The [Investing in America](#)<sup>41</sup> agenda included historic funding for broadband infrastructure, spurring [hundreds of millions](#)<sup>42</sup> of dollars in investments in manufacturing as numerous companies [onshore and expand domestic manufacturing capacity](#)<sup>43</sup>. The Broadband Equity, Access, and Deployment (BEAD) Program will invest \$42.45 billion to connect 8.5 million households and small businesses to high-speed internet that previously lacked access. BEAD funds must use America made products.

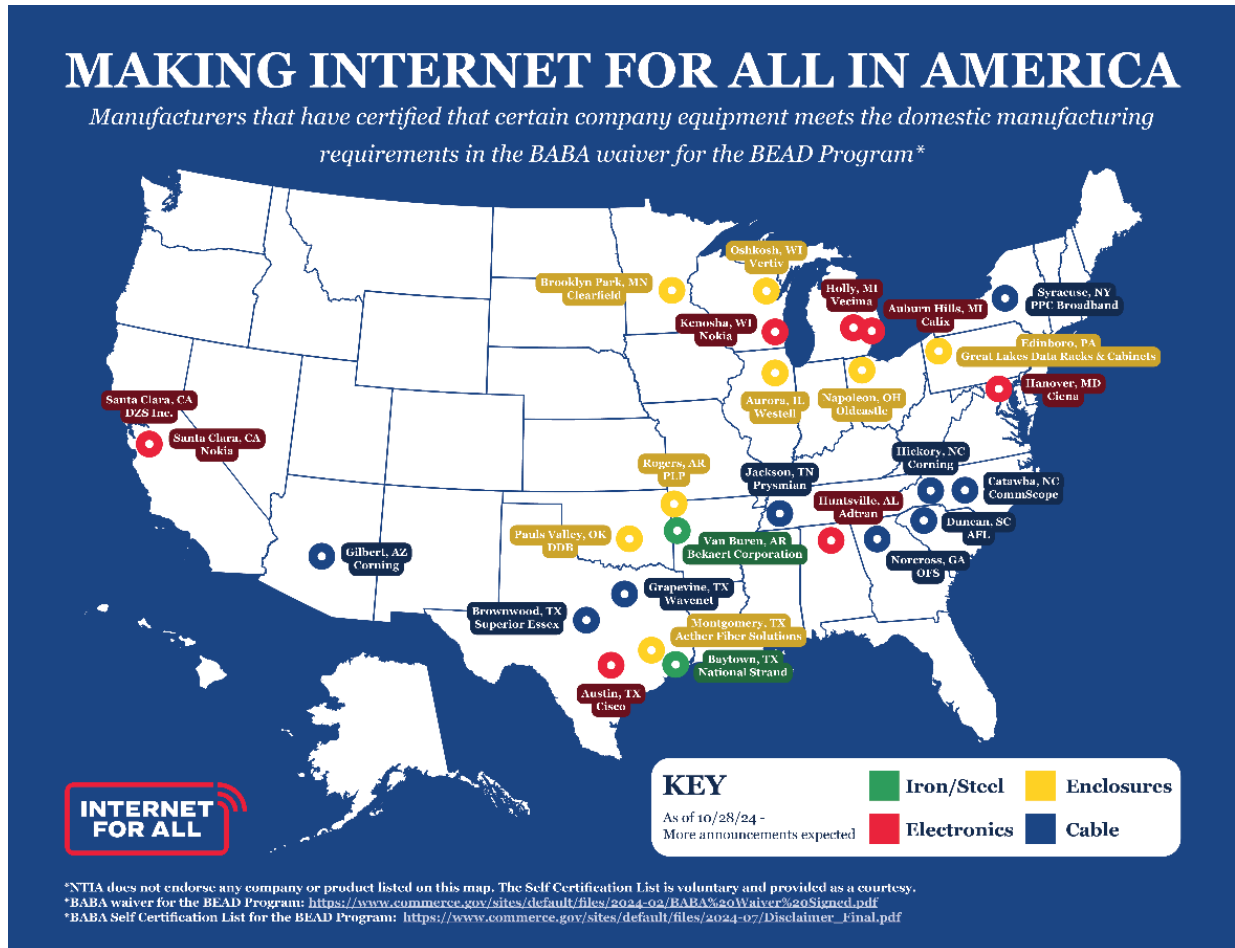
Industry initially raised concerns that the Buy America requirements for the BEAD Program were unachievable and would hinder the program's ability to execute on its policy objectives, and suggested the need for a blanket Buy America waiver for the BEAD program.

Commerce worked closely with stakeholders to develop a risk-based analysis of the equipment required for broadband deployment projects and associated timeline required to onshore production. Through this analysis, Commerce was able to focus on broadband inputs that were critical from a supply chain and national security perspective and focus on areas where firms could build out necessary domestic manufacturing capacity in the timeframes to meet program needs. DOC held more than [385 meetings](#)<sup>44</sup> with over 50 firms and 250 individuals—representing a diverse range of manufacturers, Internet service providers, trade associations, and unions among others.

Through this detailed market research, and engagement with manufactures and civil society, MIAO and Commerce were able to propose a [time-limited and targeted waiver of BABA requirements](#)<sup>45</sup>. This waiver provided a clear and consistent market signal to manufacturers of broadband equipment.

As a result of BABA policies and related actions, close to 90% of the funding spent on equipment for the \$42.45 billion Broadband Equity, Access, and Deployment (BEAD) Program will be spent on equipment manufactured in the United States. BEAD implementation Program is creating thousands of good-paying manufacturing jobs across the [country](#)<sup>46</sup> — from [Kenosha](#), Wisconsin to Hickory, North Carolina and Gilbert, Arizona. Workers in these communities are

now producing broadband equipment, like fiber optic cable and key electronics, necessary to bring affordable, reliable high-speed internet to everyone in America, including their own communities.



Source: <https://www.ntia.gov/sites/default/files/blogimages/baba-map-102824-original.png>

Commerce took key steps to leverage Federal funds to support supply chains:

- (1) During program design and following the release of the Notice of Funding Opportunity, Commerce:
  - a. Identified key products funded through BEAD to identify federal demand signal.
  - b. Conducted supply chain gap analysis and industry outreach.
  - c. Leveraged Buy America and other tools to support manufacturing where key elements of broadband infrastructure was not currently available.
  - d. Issued a strategic Buy America manufacturing plan to drive U.S. investment in key products.
- (2) During applicant selection, Commerce:
  - a. Engaged with applicants on Buy America, including on items that were not available.



- (3) During program execution, Commerce will:
  - a. Conduct follow-on RFIs.
  - b. Continue engagement with applicants and industry and calibrate as needed.

## **Water Infrastructure Components**

The Bipartisan Infrastructure Law allocated \$50 billion for upgrading water infrastructure, the largest investment in the nation’s water infrastructure in history. This included \$15 billion in dedicated funding for lead service line replacement (LSLR). Like the BEAD program, the program to release lead service lines reflects a generational investment in a specific type of infrastructure. While BEAD presented a clear market signal to industry, the market signal for LSLR was initially more obscure as a result of the complex dynamic between thousands of funding recipients and the numerous supply chain intermediaries.

To foster industry engagement and support aggregation of the demand signal for water infrastructure components, EPA and the White House organized industry convenings in 2023 to engage with manufactures, water authorities, labor unions, and program offices. The Biden-Harris Administration established the “Get the Lead Out Partnership” in association with more than 100 state and local leaders, nongovernmental organizations, water utilities, labor unions, and others, bringing together the stakeholders to continue to deliver on these investments. To support this coordination, EPA published a Request for Information Regarding Products and Categories of Products Used in Water Infrastructure Projects in the Federal Register to learn from industry’s experience. Each of these actions support demonstrating expected demand and necessary production timelines. Working together, Federal and state agencies are mapping out the expected demand for water infrastructure components, and working to communicate this message clearly to domestic manufacturers.

Public-private sector coordination initiatives and statutory Buy America requirements demonstrated clearly to American manufacturers Federal demand for products, which in turn provides firms certainty when investing in upgrading and new production lines. Spurred by Federal investments in American-made water products, firms nationwide announced [tens of millions in new manufacturing investments<sup>47</sup>](#) and hiring commitments, expanding American industrial capacity and improving supply chain resilience in the process::

**A.Y. McDonald Mfg. Co.**, an Iowa-based 167-year-old 5th generation family business with three manufacturing locations in Iowa, and Tennessee, with plans underway to build a state-of-the-art brass foundry in Wisconsin. Since the beginning of 2019, A.Y. McDonald Mfg. Co. has doubled the manufacturing space of their Tennessee facility with a 100,000 square feet addition. Their production workforce has grown 45% since the end of 2020.

**Cerro Flow Products**, an Illinois-based pipe manufacturer that is part of the Marmon/Berkshire Hathaway Group – has 100% domestic manufacturing facilities. Cerro has also invested in new workforce development programs, additional upskilling

for maintenance and electrical staff, and sponsors a tuition reimbursement program unique to the industry.

**Commercial Forged Products**, an Illinois based company that does not normally make water parts, plans to invest \$9 million in additional forging and ancillary equipment, while adding 15 new United Steelworker positions across multiple shifts, as well as hire 4 additional skilled machinists in its Bedford Park facility.

**The Ford Meter Box Company**, an Indiana-based company, announced in 2023 and 2024 expansions of its production capacity at its [Wabash, Indiana](#)<sup>48</sup> and [Pell City, Alabama](#)<sup>49</sup> facilities to meet private and public waterworks infrastructure demand in the long term, as well as lead service line replacement project needs in the near term. Ford has hired new employees, added new shifts, and invested in new equipment, all of which will increase production by 20%.

**Mueller Water Products**, an Atlanta-based company, has invested approximately \$150 million in three capital projects in recent years, expanding its U.S. production capacity due in part to the billions of dollars in water infrastructure investments made in the Bipartisan Infrastructure Law. The largest capital project [completed](#)<sup>50</sup> in 2023, is a new brass foundry located in Decatur, Illinois, which significantly expanded capacity to produce products, including those commonly used in lead service line replacements. The new foundry, replaces an existing aging facility, uses a state-of-the-art brass alloy to eliminate dependence on imported Bismuth from China and increases recyclability.

**Quality Steel Products**, a Michigan-based firm that previously did not make components in the water space, has committed to expand its business to meet upcoming demand by adding employees and additional shifts, investing millions of dollars in new forging presses and equipment, induction furnaces, transformers and capital improvement process.

By the end of 2024, total construction spending on America's water infrastructure was up 1.8 times relative to its January 2021 level (not adjusted for inflation) and nearly half a million lead pipes had been replaced since President Biden took office, benefitting 1.2 million people. By requiring products be Made in-America when federal funds are used to rebuild infrastructure, these investments are bringing clean water to all Americans while creating good-paying jobs and new domestic manufacturing.

Through historic levels of funding from the Bipartisan Infrastructure Law and American Rescue Plan, annual appropriations, and harnessing a variety of tools across Federal, state, and local government, the Biden-Harris Administration is delivering tangible progress on the groundbreaking Biden-Harris Lead Pipe and Paint Action Plan to replace all lead service lines in America in the next decade with safe and domestically-manufactured water infrastructure components.

## **Semiconductors**

The U.S. is a global leader in semiconductor design and R&D. America invented the semiconductor, and [used to produce nearly 40 percent of the world's chips<sup>51</sup>](#), but today, we produce only about 10 percent of global supply—and none of the most advanced chips. The CHIPS and Science Act aimed to change that by investing nearly \$53 billion in U.S. semiconductor manufacturing, research and development, and workforce.

In 2022, President Biden signed the CHIPS and Science Act, which is bringing high-tech semiconductor manufacturing capacity back to the United States. The CHIPS Act supports a wide range of initiatives across the technology readiness spectrum to comprehensively spur development from innovative R&D all the way to commercialization. The Department of Commerce launched the National Semiconductor Technology Center and announced billions in research and development funding opportunities; the National Science Foundation has catalyzed hundreds of millions in funding for workforce initiatives; and the Department of Defense has funded research hubs throughout the country to ensure America continues to lead industries of the future.

To ensure that federal procurement dollars directly [support these new investments in domestic semiconductor manufacturing<sup>52</sup>](#), OMB issued guidance to help the Federal Government – the world's largest buyer – organize its demand for domestic semiconductors. This effort includes agencies developing strategies to dual or multiple source semiconductors, increasing transparency for critical infrastructure supply chains, and providing the government's demand for the products and services that use semiconductors. This action follows the [RFI<sup>53</sup>](#) issued by OMB issued to seek feedback from industry on the best ways to incentivize the use of domestically manufactured semiconductors, and how the Federal Government can build and maintain this essential capability through the procurement of domestic commercial IT end products.

Since the President and Vice President took office, dozens of companies have committed to invest nearly \$450 billion in total semiconductor initiatives across this country. These new semiconductor initiatives, including \$75 billion in loan authority provided by the CHIPS and Science Act, are expected to create over 125,000 jobs. The key to the U.S.'s long-term competitiveness hinges on innovation and manufacturing. Emerging technologies like Artificial Intelligence require cutting-edge advancements in microelectronics and advanced packaging. America invented the semiconductor, and once again we are on track to revitalizing our domestic semiconductor industry through targeted investments which will create over a hundred thousand jobs all across the nation – helping ensure more chips are made in America by American workers.

## **Port Infrastructure**

Ports are critical to the growth of the U.S. economy. Investments in our ports is an investment in America. In total, the Biden-Harris Administration is investing over \$20 billion into U.S. port infrastructure over the next 5 years through the Investing in America agenda, including funding from the Bipartisan Infrastructure Law and the Inflation Reduction Act. This includes [\\$3 billion](#)

[for the EPA Clean Ports Program](#)<sup>54</sup>, which funds zero-emission port equipment and infrastructure. This program will [improve air quality for the millions of Americans living near ports](#)<sup>55</sup>, while supporting American manufacturing and jobs.

The Clean Ports Program directly benefits and strengthens American manufacturing—including through Made in America domestic content requirements. American manufacturers are building out their capacity to build zero emission port equipment. While many manufacture in the United States, numerous inputs, such as batteries, will take longer to onshore. In order to support the existing U.S. manufacturing base and to provide a clear market signal going forward, MIAO worked with EPA on a time-limited waiver of Made in America requirements; this included a phased approach for certain critical products like yard trucks and cranes. As a result, manufacturers are responding to Federal demand, which is expected to [increase demand for American manufactured equipment at least six-fold](#)<sup>56</sup> over the life of the program.

[PACECO Corp.](#)<sup>57</sup> a U.S.-based subsidiary of Mitsui E&S Co., Ltd (Japan), is planning to onshore U.S. manufacturing capacity for its crane production. [Konecranes](#)<sup>58</sup>, in response to the White House-led effort to enhance the security of the maritime environment, announced its plans to establish and grow a consortium of U.S. partners, including steel structure providers and other manufacturers, to build ship-to-shore (STS) cranes in the United States to serve North American ports. Alongside this historic funding, President Biden signed the *Executive Order on Amending Regulations Relating to the Safeguarding of Vessels, Harbors, Ports, and Waterfront Facilities of the United States* to bolster the security of the nation’s ports, and imposed [tariffs to protect American workers and businesses from China’s unfair trade practices](#)<sup>59</sup> and support America’s critical infrastructure.

## **Electric Vehicle Chargers**

President Biden has been clear that Americans should have the choice of which type of vehicle they want to drive. Leveraging the Bipartisan Infrastructure Law’s \$7.5 billion investment in EV charging infrastructure to support and catalyze the production of American-made chargers supports American manufacturing. At the time of the BIL’s passage in 2021, there was almost no U.S.-based production of fast EV chargers. In response, agencies, alongside the Made in America Office deployed an American manufacturing implementation plan to use federal funds as a catalyst to grow domestic manufacturing of EV chargers. The plan required any EV chargers purchased with Federal funds be manufactured in the United States, with a short phase in for the full Buy America requirements. Less than three years after the BIL was signed into law, the United States went from having very little EV charger manufacturing to a burgeoning industry.

The domestic manufacturing requirements, coupled with a national standard for EV chargers, provides industry the needed certainty to invest in the United States with confidence. These standards and domestic content requirements benefit producers, who can take advantage of the economies of scale resulting from a single standard. And consumers, who are not locked into a particular charging system can choose from multiple, interoperable charging products.

To coordinate supply and demand, MIAO and the agencies mapped out EV charger supply chains, investigated how Federal incentives would affect the supply and demand for chargers to

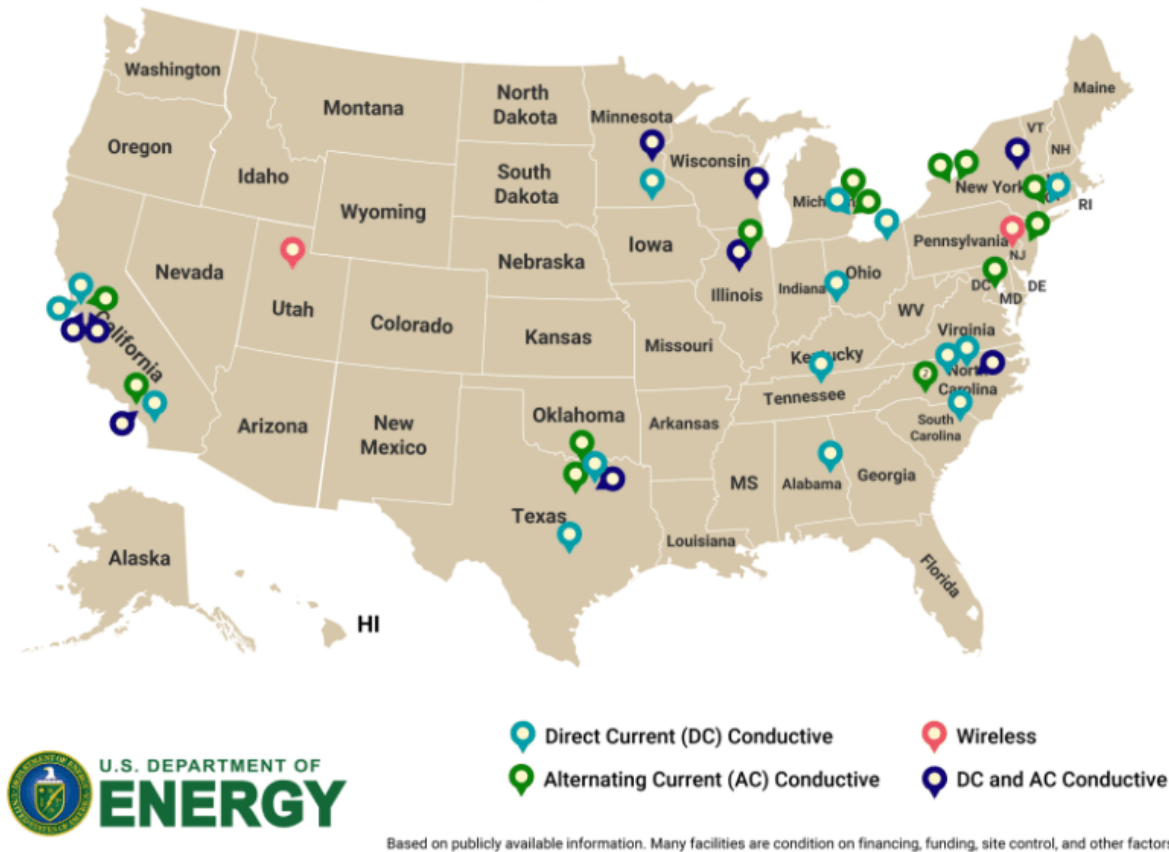
tailor procurement and FFA tools accordingly, and finally developed a BABA implementation plan to spur domestic manufacturing. The phased approach to support domestic manufacturing incentivizes companies to invest in American production of EV charging components, positioning U.S. workers and businesses to compete and lead globally while providing a transition period for companies to onshore their supply chains.

Because of these efforts, at least [40 EV charger factories](#)<sup>60</sup> in the United States have been announced or opened since the President took office, including a unionized Siemens factory, representing at least half a billion dollars of investment in the American EV charging network. President Biden set a goal of building out 500,000 publicly available EV chargers by 2030. Thanks to a combination of public and private investments, we are on track to meet that goal years early, and many of these chargers will be installed by electrical workers represented by the International Brotherhood of Electrical Workers (IBEW). To help ensure that chargers are reliable while creating good jobs for American workers, electricians who install and maintain chargers must be certified through the [Electric Vehicle Infrastructure Training Program](#)<sup>61</sup>. Through the Administration's Infrastructure Talent Pipeline Challenge, IBEW has already trained about [20,000 individuals](#)<sup>62</sup> to install EV chargers across the country.

The Biden-Harris Administration's comprehensive strategy gave time for supply chains to adjust – allowing newly announced manufacturing capacity for EV charger components the necessary time to ramp up production. These actions ensure that Federal dollars for EV chargers are used to purchase American-made products, which will also create a domestic network of knowledgeable manufacturers who can quickly provide repair parts and maintenance as needed. Since the President and Vice President took office, EV charging infrastructure has more than doubled, [with over 218,000 publicly available EV charging ports](#)<sup>63</sup> as of December 2024 – with approximately 1,000 new public chargers being added each week.



## Announced American-Made EV Charger Investments as of September 2023



Source: <https://www.energy.gov/eere/vehicles/articles/fotw-1314-october-30-2023-manufacturers-have-announced-investments-over-500>

### High Speed Rail

The Bipartisan Infrastructure Law provides the [largest investment in passenger rail since the creation of Amtrak](#)<sup>64</sup> with \$66 billion in federal funding, including much-needed support for rail modernization and improvements after decades of federal neglect—and all these rail investments include domestic content provisions to maximize the benefit to domestic manufacturers.

One key rail project is the \$3 billion Brightline West High Speed Rail project, which will create 35,000 construction jobs and 1,000 permanent positions when completed in 2028. Brightline West will serve an estimated 8 million passengers annually between Las Vegas and Southern California. Because of the work of DOT and MIAO, it is estimated that more than 95 percent of the total direct dollar expenditures for the project will be spent on domestically sourced products and labor, creating good paying manufacturing jobs across the country, including union jobs.

- Brightline West will use [700,000 concrete rail ties, 2.2 million tons of ballast, and 63,000 tons of 100% American steel rail during construction](#)<sup>65</sup>. Upon completion, it will include

322 miles of overhead lines to power the trains and will include 3.4 million square feet of retaining walls. The project covers more than 160 structures including viaducts and bridges.”

- In response to Buy America requirements, Siemens is onshoring manufacturing to a new facility in Horseheads, New York. The \$60 million factory is expected to begin production in 2026.
- Siemens currently supports 2,000 suppliers across over 40 states across the U.S., many of which are small businesses located in rural areas.
- The project sponsors also established a commitment with several craft rail unions for the use of highly skilled union labor in critical operations and maintenance jobs. The memorandum of understanding with the High-Speed Rail Labor Coalition is comprised of 13 rail unions representing more than 160,000 freight, regional, commuter, and passenger railroad workers in the United States.

Another key project supported by the Investing in America Agenda is the California High-Speed Rail project, which will ultimately link Los Angeles and San Francisco and allow for travel between the cities in under three hours at speeds capable of exceeding 200 miles per hour. The project has created over 14,000 construction jobs and has resulted in [over a billion dollars in revenue](#)<sup>66</sup> for the 881 California small businesses playing a role in building the project. In addition, the project is estimated to spend over 98% of total direct expenditures on domestically sourced products and labor and all construction materials used in the project will be made in America. Firms from [43 states across the country](#)<sup>67</sup> are already involved in the California High-Speed Rail project.

Industry experts anticipate [4.7% annual growth](#)<sup>68</sup> in American rail manufacturing from 2021 to 2026. [Siemens estimates](#) that every [\\$1 invested in rail generates an estimated \\$4 in economic returns, and every \\$1 billion invested in rail creates 24,000 jobs](#).<sup>69</sup> In 2024, researchers found a total of [680,000 employees](#)<sup>70</sup> working across America’s freight and passenger rail supply chains, representing 750 rail manufacturing companies in at least 39 states.

Brightline West and California High-Speed Rail, along with the Biden-Harris Administration’s other passenger rail projects will add new rail service to cities that have historically lacked access to the country’s rail network. In addition, manufacturers are building and onshoring manufacturing capacity in the United States in response to new demand for passenger rail (as well as the significant IRA-funded expansion of transit rail). These investments will build a more resilient transportation network that creates jobs, reduces costs for Americans, and will benefit communities across the country.

## **Clean Energy Manufacturing**

The Biden-Harris climate and energy infrastructure laws are [spurring](#)<sup>71</sup> a boom in American clean energy manufacturing as factories break ground and expand existing manufacturing nationwide to make critical minerals and geothermal, nuclear, hydropower, batteries, solar, wind, and electric grid components of the growing American energy economy. Communities that have powered our Nation for generations are seeing new manufacturing investment for the first time in decades. These historic investments support America’s continued energy independence, and are

further support fair competition, good family sustaining wages, workplace protections, worker safety, and strong environmental standards. These investment support energy security and economic security. And they protect U.S. jobs and innovation from anticompetitive and unfair practices by the Chinese government.

The Inflation Reduction Act (IRA) leverages financial assistance, low-cost financing, and the tax code to support American manufacturing and good-paying jobs. This includes the domestic content bonus for the clean energy investment and production tax credits, credits to locate manufacturing in energy communities, as well as prevailing wages and registered apprenticeship provisions. Combined, these measures strengthen America's energy security, creating good-paying, high-quality jobs, and spurring economic growth. The domestic content bonus provision applies a 10 percent, or 10 percentage point bonus credit for clean energy projects that use American made steel, iron, and manufactured products, like solar panels, wind turbines, batteries, hydropower generators, and geothermal equipment. This demand-side incentive is coupled with supply side manufacturing provisions through the Advanced Manufacturing Production Credit (Section 45X) and Advanced Energy Project Credit (Section 48C). 48C provides an investment tax credit of up to 30% of qualified investments for certified qualifying advanced energy projects that meet prevailing wage and apprenticeship requirements. [Projects include<sup>72</sup>](#) those that expand manufacturing, recycling or critical materials refining, processing as well as industrial decarbonization. The 48C program provides [\\$10 billion in total tax credits<sup>73</sup>](#), which, by law, must include at least \$4 billion for projects in designated energy communities—which includes communities with closed coal mines or coal plants. Combined these credits create a powerful positive feedback loop to spur investments in American manufacturing of clean energy technology.

Multiple Bipartisan Infrastructure Law and Inflation Reduction Act grant programs administered by the Department of Energy (DOE) have provided billions in capital to support domestic manufacturing. Notable examples include the Battery Materials Processing and Manufacturing Grants Program, which includes \$5 billion to support approximately 40 projects to boost domestic production of materials critical to advance national and economic security goals, including advanced batteries, battery materials, and battery recycling. The Advanced Energy Manufacturing and Recycling Grants Program, which provides nearly \$700 million in grants to small- and medium-sized manufacturers (SMMs) to build or retrofit manufacturing and industrial facilities in communities where coal mines or coal power plants have closed. The Domestic Manufacturing Conversion Grant Program provides over \$1.5 billion to support the conversion of 10 shuttered or at-risk auto manufacturing and assembly facilities across eight states to manufacture electric vehicles and their supply chain.

In addition to these grants, DOE's Loan Program Office has been implementing loan and loan guarantee authorities that were created or expanded by the Inflation Reduction Act. \$34.3 billion in loans have been committed through the Title 17 Clean Energy Financing Program Title 17 and \$21.4 billion have been committed through the Advanced Technology Vehicles Manufacturing Loan Program. These programs are intended to deploy or manufacture new energy technologies, repurpose existing energy infrastructure to generate power or reduce emissions, or support the manufacture of advanced technology vehicles and their components.

While federal agencies deploy [unprecedented investments](#)<sup>74</sup> to support [American manufacturing](#)<sup>75</sup> and innovation, the Biden-Harris Administration has also taken action to protect America's growing clean energy manufacturing workforce from unfair trade practices from China by increasing tariffs on imports from Chinese-manufactured goods in strategic sectors such as electric vehicles, batteries, critical minerals, solar modules, and steel and aluminum. The Biden-Harris Administration has also taken action to support America's continued energy independence through investment in the clean energy workforce.

Since President Biden and Vice President Harris took office, companies have announced \$276 billion in investments in American clean energy and electric vehicle manufacturing, creating new U.S. manufacturing jobs and supporting economic opportunities in communities which have powered the Nation for generations, and will continue to do so.

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