


BLUEGREEN ALLIANCE

BAIT AND SWITCH

The Impacts of Trump Administration Policies at the Intersection of Clean Energy, Manufacturing, and Labor


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SUMMARY

Going into 2025, the United States was on a path to a better future. Years of work creating the foundation for a clean economy manufactured and built in the United States were beginning to deliver benefits for workers and communities across the country. Policies, programs, and initiatives were driving huge amounts of investment, promoting innovation, and bringing the promise of the creation of good, union jobs. Strides were being made to secure safety and health on the job and to defend workers' rights.

Upon taking office, President Donald Trump and his allies in Congress have gone to incredible lengths to demolish that foundation. And while the administration's sledgehammer tactics have had varying levels of success—frequently being rebuffed in courts—every effort they have made to dismantle the laws, programs, and policies that were benefiting families and communities has only succeeded on one account: demonstrating disdain for working people.

As is frequently the case with Donald Trump and his Congressional allies, the words are counter to the facts. While President Trump continues to claim that his policies will create jobs and lower costs, that is not the reality that working people are living on the ground. Trump claimed in January 2026 that "jobs and factories will come roaring back into our country."[1] They are not—manufacturing jobs have been lost since his first term began.[2] Trump claimed in his 2026 State of the Union address that "we have added 70,000 new construction jobs in just a very short period of time." That is not true by a long shot.[3] Trump claimed in January 2025 that "under the Trump administration, there will be no better place on Earth to create jobs, build factories, or grow a company than right here in the good old USA."[4] But Trump has eroded trust in the U.S. government by canceling federal contracts for previously approved projects.[5] This has hurt companies, even bankrupted some, but ultimately working people are paying the biggest price.

BlueGreen Alliance (BGA) research has found that largely due to the One Big Beautiful Bill Act (OBBBA), **223 manufacturing, clean energy, and industrial projects** are already facing cancellations and delays representing at least **$82.8 billion in capital investment** which could cost **111,765 jobs**. Additionally, **more than 3,034 manufacturing, clean energy, and industrial sites** face tax restrictions due to OBBBA, putting at risk **$695.2 billion in capital investment** and **1,184,996 jobs**.

Details:

- **223 clean manufacturing, energy, and industrial projects** across the country—representing **at least $82.8 billion in capital investment**—have been canceled or stalled.[6] This includes:
  - **84 canceled or stalled manufacturing projects**, resulting in the loss or delay of at least **$52 billion in capital investment**; and
  - **139 canceled clean energy and industrial projects**, resulting in the loss or delay of at least **$30.8 billion in capital investment**.
- The loss of manufacturing and clean energy projects may cost the nation **111,765 jobs**, including:
  - **47,135 manufacturing jobs**; and
  - **56,959 construction jobs**.
- At least **3,034 manufacturing, clean energy, and industrial sites** are subject to stricter tax eligibility requirements under OBBBA. These sites face tighter deadlines and restrictions to qualify. This puts at risk:
  - At least **750 manufacturing sites** expected to create at least **160,325 manufacturing and operations jobs, 20,678 construction jobs, and spend over $218.8 billion in capital investment**; and
  - At least **2,284 clean energy and industrial sites** expected to create at least **36,132 manufacturing and operations jobs, 967,861 construction jobs, and spend over $476.4 billion in capital investment.**

In addition, there are significant impacts to the rights and health and safety of workers from decisions made by Trump and the GOP Congress. These include executive orders, funding cuts, and agency decisions that Trump and Republicans in Congress have enacted to dismantle unions, worker safety protections, and equity efforts in the private and public sectors.

From the U.S. Environmental Protection Agency's weakening of the Risk Management Program rules that would have made highly hazardous industries safer to the executive order stripping of collective bargaining rights of more than a million federal workers to attacks on Diversity, Inclusion, Equity, and Justice (DEIJ) efforts, workers are less safe, work is more dangerous, and fundamental rights of workers are weakened today.[7]

This illustrates a drastic reversal from the years of progress the nation had made toward a pro-worker clean economy. This report will explore in detail the impacts of Trump's policies on working people at the intersection of clean energy, manufacturing, and labor. While these policies have undeniably benefited the billionaire class, we will show how working people are experiencing good jobs ripped from their communities, canceled projects, higher energy bills, and increasingly unsafe working conditions.

WHERE WORKING PEOPLE STOOD BEFORE TRUMP'S SECOND TERM

During the Biden administration and under the 117th Congress, the United States saw significant progress toward the creation of a pro-worker clean economy. The passage of landmark pieces of legislation made historic investments in clean energy, advanced manufacturing, and modernized infrastructure: the Bipartisan Infrastructure Law (BIL) and the Inflation Reduction Act. Many—though not all—of the provisions in these laws were tied to labor standards to incentivize the creation of good, family-sustaining jobs. Each of these laws addressed critical sectors of the U.S. economy.

Concurrently, the Biden administration laid out clear commitments to maximize the job quality, equity, and community benefits of these laws and other federal spending through executive orders and initiatives. Biden sought to deliver on his commitment to working people by advancing high-road labor standards and securing worker rights and protections through policies such as Executive Order 14063 on Project Labor Agreements (PLAs).[8] To build on the administration's commitment to create and improve access to high-quality jobs, the White House National Economic Council and U.S. Department of Labor (DOL) established the Good Jobs Initiative.[9] Through the initiative, DOL worked with the U.S. Department of Commerce (DOC) to create eight Good Jobs Principles to establish a shared framework of job quality for workers, businesses, labor unions, advocates, researchers, and state and local governments. DOL also partnered with the U.S. Department of Transportation (DOT), the DOE, the U.S. Department of the Interior (DOI) and DOC through a Memorandum of Understanding (MOU) to support the creation of high-quality jobs.[10]

The Inflation Reduction Act

The Inflation Reduction Act was working to revitalize U.S. manufacturing, grow clean energy, target investment to ensure all communities reap economic gains from the energy transition, and support and create good union jobs across the country. It aimed to tackle climate change by reducing emissions up to 42% by 2030 and create the good-paying, union jobs needed to give all workers the opportunity for a middle-class life.

The Inflation Reduction Act was crafted to:

- Grow clean energy and significantly reduce emissions while creating high-quality jobs in the clean economy.
- Ensure that deploying clean technologies contributes to a revival and reshoring of U.S. manufacturing after decades of decline, including making historic investments to expand clean energy and electric vehicle (EV) manufacturing and accelerating clean vehicle deployment and improving mobility and air quality in communities.
- Extend and establish clean energy and manufacturing tax credits for onshore and offshore wind, solar, geothermal, direct air capture, battery storage, carbon capture, clean hydrogen, and more. Crucially, the law included provisions that make it more likely the jobs created by these investments were high-quality jobs by attaching—for the first time ever—high-road labor standards to clean energy deployment.
- Transform the industrial sector to reduce emissions and build domestic supply chains for vital technologies.
- Establish critical investments in clean energy infrastructure, transmission, energy efficient homes and buildings, affordable housing, and resilient and healthy communities.
- Sustain and expand high-quality jobs for workers and in communities that need them the most, including low-income workers and workers living in communities that have been hit hard by the energy transition.

The Bipartisan Infrastructure Law

BIL was a historic effort to improve the nation's crumbling and unhealthy infrastructure, providing the largest federal infrastructure investment in the history of the United States. The law included $550 billion in new federal infrastructure funding to repair, rebuild, and modernize the nation's bridges, transit systems, water infrastructure, and more. While more than half of the law's funding was allocated for transportation infrastructure—including surface transportation, airports, zero-emissions school buses, EV charging, ports, public transit, railways, and more—it also provided significant funding for broadband, the power grid, water infrastructure, resilience, and reducing legacy pollution. Additionally, this law included prevailing wage and Build America Buy America provisions to help create high-quality union jobs not only at construction job sites but also at manufacturing facilities down the supply chain.

A National Skills Coalition (NSC) BGA analysis found that 8.8 million job years—one person working at one job for one year—were expected to be created over the course of five years due to BIL programs alone.[11]

Together, the actions of the Biden administration and 117th Congress had laid the groundwork for a more equitable clean economy in which climate action and the creation of good union jobs were linked. The promise of the legislation and policies adopted during the Biden era was beginning to deliver for working people before the 2024 election.

Notable provisions in BIL include:

- A $39 billion federal investment in public transit—the largest in U.S. history;
- The largest federal investment ($66 billion) in passenger rail since the creation of Amtrak;
- The largest dedicated bridge investment ($40 billion) since the creation of the interstate highway system;
- A $55 billion investment in clean drinking water and wastewater infrastructure—the largest ever;
- The expansion of high-speed internet access;
- The largest investment in clean energy transmission ($5.5 billion) and EV infrastructure ($7.5 billion) in history;
- Over $11 billion in funding to reclaim abandoned mine lands;
- $5.6 billion towards the expansion of the electric school and transit bus fleets; and
- New funding and authorities to build a more climate-resilient and efficient electric grid.

The Impact of Biden Era Policies on Working People

An analysis by the University of Massachusetts Political Economy Research Institute (PERI), commissioned by the NSC and BGA, found the investments from the Inflation Reduction Act, BIL, and the CHIPS and Science Act (CHIPS) programs were expected to generate, in total, an average of 2.9 million jobs per year and 19 million job-years in total over the time span of these laws.[12] Of that total, 8.5 million job years—one person working at one job for one year—were expected to be created over the course of 10 years due to Inflation Reduction Act programs alone.[13] Roughly two-thirds of direct job creation is expected to take place in the construction and manufacturing sectors, representing 453,000 jobs and 230,000 jobs respectively.

The years 2022 and 2023 saw the greatest acceleration in construction of manufacturing facilities in a generation.

From the enactment of BIL in 2021 through IRA becoming law in 2022, private sector investment in clean energy rose to a total of nearly $695 billion compared to $288 billion preceding the law.[14] In clean tech manufacturing investments in batteries, fueling equipment, and critical minerals refining and processing, each grew at least three-fold, and investments in EV assembly grew 45%.[15] The years 2022 and 2023 saw the greatest acceleration in construction of manufacturing facilities in a generation. At the beginning of 2021, U.S. firms were investing $76 billion a month building new manufacturing operations. By the end of 2023, they were investing $230 billion monthly.[16] For the first time in decades, federal policy was creating the conditions for onshoring rather than offshoring manufacturing in a global economic race to make some of the most important technologies of the future.

Labor standards were having an effect. Union jobs accounted for one of every three new jobs across the energy sector in 2024, and 54% of DOE-funded projects had project labor agreements, and 32% had union neutrality commitments or collective bargaining agreements.[17, 18] Giving the gains in union density, it's no surprise that wages were also increasing on these projects. Weekly earnings for workers building power and communication lines rose 43%, and construction wages on projects funded by DOE with prevailing wage requirements were about 40% higher than average construction wages in the United States.

The administration and Congress's efforts to target investment in communities that needed it the most were working. More than 36% of clean energy investments were going to energy communities—including communities that had experienced the closure of a coal mine or power plant—and more than 44% were going to disadvantaged communities.[19]

THE TRUMP ADMINISTRATION'S WHOLE OF GOVERNMENT ATTACK ON PROGRESS

These policies and investments were working when Donald Trump was elected to his second presidential term.[20] Now, the benefits of the policies, programs, and initiatives may never be realized. Trump's all-out assault on the progress of the years prior to his 2024 election began immediately after being sworn in. Upon taking office, Trump immediately began working to dismantle this progress, overturning Biden-era executive orders, stalling workplace safety regulations, reversing huge sections of the Inflation Reduction Act and BIL, and starving government agencies critical to building a pro-worker clean economy.

Trump Executive Orders

Starting from the first day of his second presidential term, Trump issued executive orders repealing several climate measures, efforts to address systemic racial and environmental injustice, efforts to position the nation as a leader in the clean vehicle sector, and protections for civil servants.[21] In these executive orders, Trump:

- Repealed a prior executive order on tackling climate change, which included the creation of the Interagency Working Group (IWG) on Coal and Power Plant Communities and Economic Revitalization Activities to assist energy communities that have historically depended on fossil fuels.
- Paused or canceled congressionally appropriated funding from the Inflation Reduction Act and BIL, setting the stage for a mass termination of awards that caused widespread confusion, job loss, and stalled and canceled projects.
- Ended the Justice40 Initiative, which set a policy that 40% of the benefits of all federal investments must go to disadvantaged communities.
- Reinstated Schedule F, an artifact of his first term under which federal employees in policy-determining, policymaking, and policy-advocating positions can be terminated at will.

The "One Big Beautiful Bill Act"

Beyond executive orders, one of the main vehicles for Trump's ideological attacks on the clean economy and workers has been the OBBBA passed by Republicans in Congress in 2025.[22] At the heart of the GOP legislation is an aggressive rollback of clean energy tax credits and investments. The phase-outs for solar, wind, and consumer credits are particularly damaging. These credits were not just economic incentives— they were commitments to a future where workers in the United States build the technologies that power our economy.

The OBBBA also claws back unobligated funding for community-based investments aimed at reducing pollution in disadvantaged communities. The OBBBA eliminates support for state, Tribal, and local government grants focused on climate change planning, resilience, adaptation, and response, negatively impacting low-income communities and communities of color that are already disproportionately affected by climate change and toxic pollution.

By gutting these grants and the clean energy and manufacturing investments that have been driving job creation and economic revitalization, this law represents a direct attack on workers, families, and our country's competitive future. Simply put, the OBBBA trades away real, tangible progress in communities across the country in exchange for tax breaks that benefit billionaires.

Weaponizing the Federal Government to Attack Offshore Wind and Drive Up Costs

One of the most relentless attacks on energy undertaken by the Trump administration during his second term has been a multi-agency effort to halt the development of offshore wind. Offshore wind development has the potential to create thousands of good new union jobs, gigawatts of affordable energy for the national grid, and economic revitalization for vulnerable communities, but regardless of the significant benefits of the energy source, Trump has consistently attempted to dismantle the industry. Since taking office, Trump has:

- Issued an executive order that halted all offshore wind leasing and permitting. This was ultimately struck down in court as unlawful.[31]
- Halted construction on five East Coast offshore wind projects in December 2025, citing "national security concerns." All projects were planned in coordination with the U.S. Department of Defense, and the developers have successfully challenged the stop work orders.[32]
- Attempted to remand permits for offshore wind projects along the nation's coasts despite the projects' significant potential for clean energy generation and approval of federal permits after years of review.[33]
- Repealed tax credits specifically for clean energy projects like wind and solar.
- Returned $1 billion to the France-based energy developer Total Energies if they agree not to build its offshore wind projects in the United States and walk away from its leases.[34]
- In addition, in June 2026, the administration paid companies an additional $765 million to terminate four more offshore wind leases.[35]

Polling has indicated that these—and other efforts to halt the build out of clean energy—are widely unpopular. One poll found that 68% of respondents agree that the country needs all kinds of energy, including renewables.[36] Voters are seeing their utility bills increase and, regardless of political affiliation, believe that keeping clean energy off the grid is part of the problem. They do not support the Trump administration's efforts to all but ban forms of energy Trump doesn't like.

In the face of a sustained assault from the Trump administration, the offshore wind industry has continued to work to get projects online. Revolution Wind off the coast of Rhode Island is delivering power to the grid, and construction of Vineyard Wind off the coast of Massachusetts was completed in March 2026.[37] The Coastal Virginia Offshore Wind project also began delivering power in March 2026.[38]

And while Trump is trying to squash the U.S. offshore wind industry, other countries, like Canada, are surging forward to lead on offshore wind development. Nova Scotia is aiming to build 5,000 megawatts (MW) of offshore wind capacity. Canada conducted a pre-qualification process for project bids earlier this year, attracting global competitors to build in their waters.[39]

DOE Award Cancellations

Since January 2025, DOE has terminated 356 awards for projects across the country, wiping out $12.5 billion in federal clean energy investments.[23] Most of these terminations were announced in October 2025 and openly targeted projects in states that did not vote for Donald Trump in the 2024 presidential election. Some of those states challenged the partisan cancellations in court, and in those states, grants were reinstated. The October 2025 cancellations followed a wave of award terminations in May 2025. Additionally, a longer list of awards has circulated that were rumored to be the targets of future cuts.[24]

THE TRUMP EFFECT ON WAGES AND RISING COSTS

One of the president's biggest lies has been to downplay rising costs and falling wages across the country. On the campaign trail, Trump promised he'd lower living costs for working people. Not only has he failed to do that, but prices are also increasing while real wage growth is not keeping up.

In December, Trump called affordability a "democratic hoax," demonstrating how out of touch he is with the lives of working people.[25] Residential electricity prices rose by as much as 13% in some places last year and could rise by 18% in 2026, according to Trump's own administration.[26, 27] This is part of a larger problem—it's not just energy. Across the board, everyday expenses are squeezing working people. Food costs are up nearly 20%, the cost to see a doctor is up over 7%, prescription drug prices are up over 5%, rental and home insurance costs are up over 15%, and car insurance is up a whopping 56.3%.[28] Health insurance costs have also increased due to the OBBBA, with those purchasing insurance on the Affordable Care Act health insurance marketplace seeing average increases of 26% in their premiums.[29]

And while costs continue to climb, wages and job growth are not keeping up. According to the Economic Policy Institute, pay for low-wage workers fell by 0.3% in 2025, a significant drop compared to the previous five years' increases in pay. The fallout from Trump administration policies is actively impeding people from making a living wage and exercising their right to unionize. The discussion on affordability must start with access to good jobs if working families are to succeed.

THE TRUMP EFFECT ON JOBS, CLEAN ENERGY, AND MANUFACTURING

The Trump administration's policies have resulted in a loss of projects and investments that had the potential to create and maintain millions of jobs.[30] As Trump and the GOP begin implementing their energy and industrial policies, the harm to these industries and to communities across the country has become clearly apparent. BGA research has found that since Trump took office, 223 clean manufacturing, energy, and industrial projects across the country—representing at least $82.8 billion in capital investment—have been canceled or stalled. This includes 84 canceled or stalled manufacturing projects, resulting in the loss or delay of more than $52 billion in capital investment; and 114 canceled clean energy and industrial projects, resulting in the loss or delay of more than $30.8 billion in capital investment.

With that lost investment comes a threat to the jobs it promised, jobs that working people need at a time when costs are skyrocketing. The cancellations and delays we have already seen on clean manufacturing projects threaten at least 47,135 manufacturing jobs. Likewise, the cancellations of clean energy projects and industrial projects to date threaten at least 56,959 construction jobs.

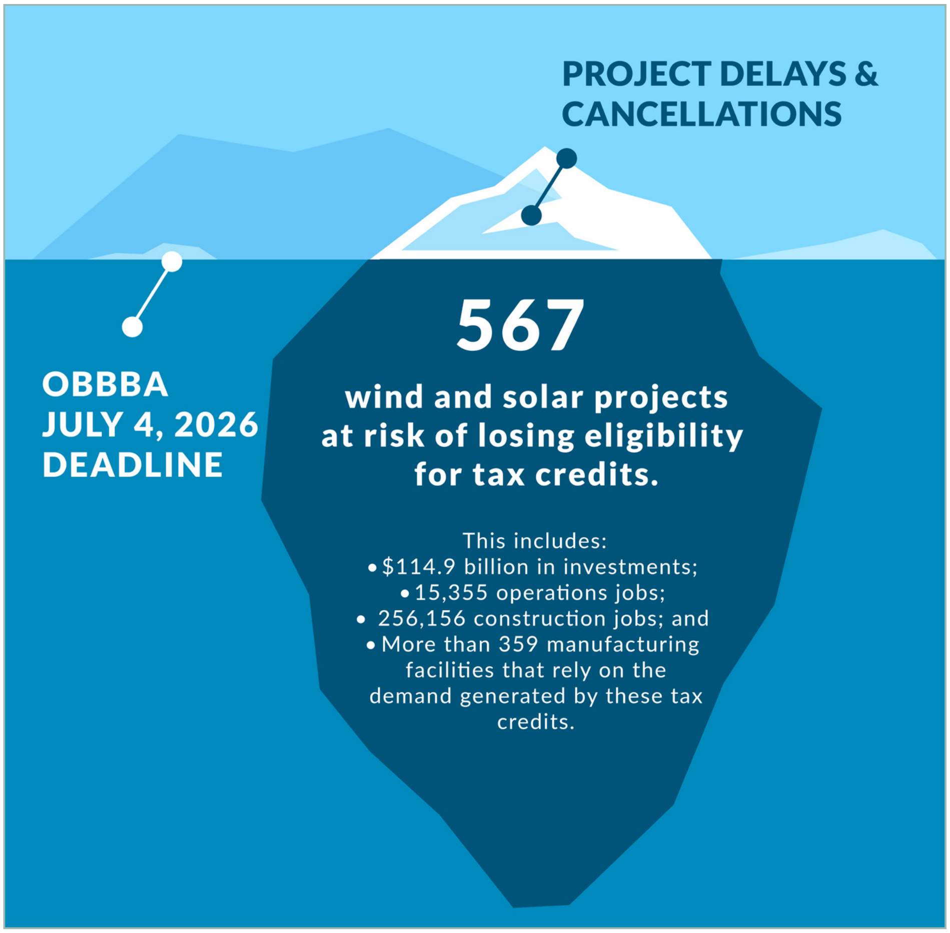
Because the OBBBA established stricter deadlines and restrictions for eligibility for certain Inflation Reduction Act tax credits, clean manufacturing and clean energy projects are facing increasingly difficult market conditions. These changes to tax eligibility have or will impact at least 3,034 clean energy and industrial projects that were expected to create at least 1,184,996 jobs and spend over $695.2 billion in capital investment.

In the clean energy sector in particular, there is reason to believe the project cancellations and delays seen to date are just the tip of the iceberg. Under the OBBBA, wind and solar energy projects had to begin construction no later than July 4, 2026 to remain eligible for Inflation Reduction Act tax credits. Now, as the July 4, 2026 deadline has hit, the landscape for clean energy development is much more difficult. BGA research found that OBBBA's July 4th deadline put 567 wind and solar generation projects—with a combined total of 90,512 MW nameplate capacity—at risk of losing eligibility for the technology-neutral clean energy investment and production tax credits. This accounts for $114.9 billion in investments, 15,355 operations jobs, and 256,156 construction jobs. The potential loss of these projects could have significant impacts down the supply chain, as more than 359 manufacturing facilities that rely on the demand generated by these tax credits may also begin to see a reduction in orders.

Since the passage of the bill, states and developers have been rushing to break ground on clean energy projects to meet that deadline, and actual year-over-year investment trends in clean energy deployment remain strong.[40, 41] However, beyond the July 4 cliff, future-looking indicators suggest trouble for renewables: utility-scale clean electricity and industrial decarbonization project announcements are down 46% in 2025 compared to 2024.[42]

Additionally, new restrictions have, or will, impact at least 750 manufacturing sites which were expected to create at least 160,325 manufacturing and operations jobs, 20,678 construction jobs, and spend over $218.8 billion in capital investment.

However, to understand the true depth of the impact of Trump's policies and what they have cost working communities, the effects on job quality and accessibility must be explored alongside job numbers. The policies in the Inflation Reduction Act and BIL did not seek only to create jobs; they sought to create good jobs in the communities that needed them most—like deindustrialized communities and energy transition communities. Additionally, many of the loan and grant programs implemented by the Biden administration required projects to use CBPs to ensure expansive community benefits come to the areas hosting projects.



Immediately upon taking office in 2025, President Trump issued an executive order taking aim at diversity, equity, inclusion, and justice (DEIJ) policies that suspended the use and enforcement of CBPs. CBPs often include features such as community engagement timelines, economic development funds, workforce training, and environmental remediation proposals.

At DOE alone, 82 projects—representing almost $4.8 billion in federal funding—that are now canceled had active CBPs, which would have ensured the projects created high-road jobs and that communities actually saw the benefits of these investments.[43] There are 94 remaining DOE awards with CBPs; even if they avoid being canceled, they will not be reimbursed for any CBP-related costs, eroding or potentially eliminating community benefits.

To some degree, the Inflation Reduction Act and BIL included requirements for labor standards. The Inflation Reduction Act included labor standards on some tax credits, and likewise, labor standards in BIL only applied to some programs. There are concerns that emerging clean energy sectors are entrenching lower levels of unionization, wages, and benefits, rather than taking advantage of the opportunity to build a new generation of good energy sector jobs.[44] Labor standards for construction in BIL and the Inflation Reduction Act were countering that trend—union representation across the energy sector was increasing under the laws and union jobs accounted for one of every three net new jobs across the energy sector in 2024.[45]

Unfortunately, Congress did not enact comparable labor standards for manufacturing and electric vehicle tax credits. With no such labor standards created by the Inflation Reduction Act for manufacturing, industrial unions were working hard to win union representation at many facilities within the clean energy and advanced manufacturing sectors. In many cases, this has been an uphill battle, especially in states that have adopted so-called “Right-to-Work” laws.

CASE STUDY: GRAIN BELT EXPRESS

The Grain Belt Express is a proposed high-voltage electric transmission line designed to move electricity primarily generated from wind from rural Kansas across Missouri and Illinois to Indiana. At roughly 800 miles long, it is one of the largest transmission projects ever proposed in the United States. The project seeks to address a critical and growing electricity supply gap in the region by connecting three regional electricity grids: the Southwest Power Pool (SPP), the Midcontinent Independent System Operator (MISO), and the Associated Electric Cooperative Incorporated (AECI). In addition to supporting thousands of jobs, connecting these grids would strengthen energy security and lower costs for ratepayers.[46]

In November 2024, DOE issued a conditional loan guarantee of up to $4.9 billion to support financing for the first phase of the Grain Belt Express.[47] On July 23, 2025, the Trump administration terminated the guarantee, arguing the project did not meet federal risk standards and was not critical for federal involvement.[48] They offered no explanation for this determination. It's more likely that the administration canceled the loan because the project will use clean energy from the resource-rich Plains and bring it to load centers farther east. This jeopardizes Trump's vendetta against clean energy and weakens his claims that energy solutions like wind and solar aren't viable.

According to project developer Invenergy, the Grain Belt Express was expected to create approximately 5,500 jobs, largely during the multi-year construction period.[49] These positions would include skilled union construction workers, electricians, engineers, manufacturing workers, and supply-chain jobs, many concentrated in rural Kansas and Missouri. The project was also expected to deliver over $52 billion in energy cost savings to consumers in the three regions, which together comprise over 40% of Americans.

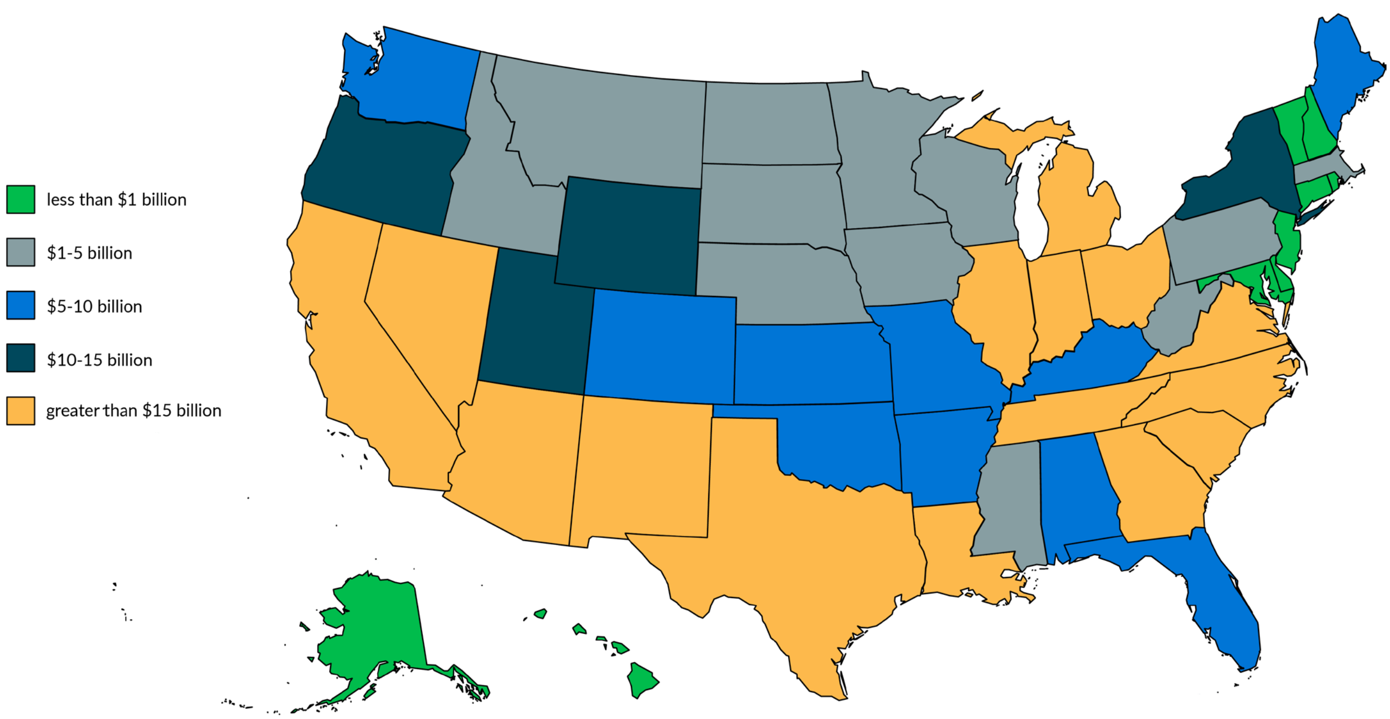
The cancellation of the federal loan guarantee did not result in project cancellation, but it introduced uncertainty. Without federal backing, securing financing will make the project more difficult and expensive, which has already delayed construction timelines and deferred job creation.

Image from grainbeltexpress.com of the approved Grain Belt Express Route.

The potential for the massive creation of good, accessible jobs across the country has not just been halted; it is being reversed. For example, while some clean energy project developers are continuing to push forward with their projects regardless of the less favorable federal landscape, there is a threat to working people in the construction sector due to program clawbacks and canceled projects. The hiring rate in the construction industry—the number of new hires during the month as a total share of employment—dropped to 3.3% in February 2026, down from 4.2% the previous year.[50] This is the slowest hiring rate since the U.S. Bureau of Labor Statistics (BLS) started tracking the metric in December 2000.[51] This tracks with analysis of the OBBBA, which shows significant job losses. Following the bill's entry into law, Energy Innovation conducted an analysis that concluded that due to the law's policies, 760,000 jobs would be lost by 2030.[52]

Looking at the repeal of just one provision of the Inflation Reduction Act—the 30D EV consumer tax credit—reveals an immediate and marked downturn in EV sales. Before the tax credit repeal, EV sales reached 10.5% of the U.S. market. By February of 2026, that number dropped to 4.8%.[53] In the fourth quarter of 2025, Ford Motor Co. EV sales decreased 52%, and General Motors EV sales decreased 43%. This has resulted in significant layoffs for autoworkers at Ford and GM, as well as several other automakers and EV auto suppliers, including Rivian, Lucid Motors, Ultium Cells, Freudenberg, SK Battery, and more.

Investments at Manufacturing, Clean Energy, and Industrial Sites Put at Risk by OBBBA



Investment totals aggregated by state from the 2,726 sites subject to stricter tax eligibility requirements that have investment numbers.

CASE STUDY: ULTIUM CELLS

Ultium Cells Ohio was a $2.6 billion joint venture between General Motors (GM) and LG Energy Solution (LGES), and as of June 2024, there were nearly 2,200 hourly and salaried workers on site, surpassing Ultium's employment expectations when they first announced the facility. The United Auto Workers (UAW) worked tirelessly and were succesful at organizing the Ultium plant to ensure safety and living wages.[54] That loss of jobs is not only a loss for the workers, but also a loss for all those who live and work in the community. Ultium is in a deindustrialized area of Ohio's Mahoning Valley, and the community there had spent years working to bring manufacturing jobs back to the area. The investment and job creation of the project were a significant boon to the local economy.

However, following the passage of the OBBBA, which repealed the EV consumer tax credits (30D) that spurred EV purchases and production, the Mahoning Valley was hit with job cuts at the Ultium plant, with around 500 jobs lost and 850 workers temporarily laid off. General Motors and Ultium stated the reason for the layoffs was slowed EV sales, which was a direct result of Congress's EV tax credit repeal.

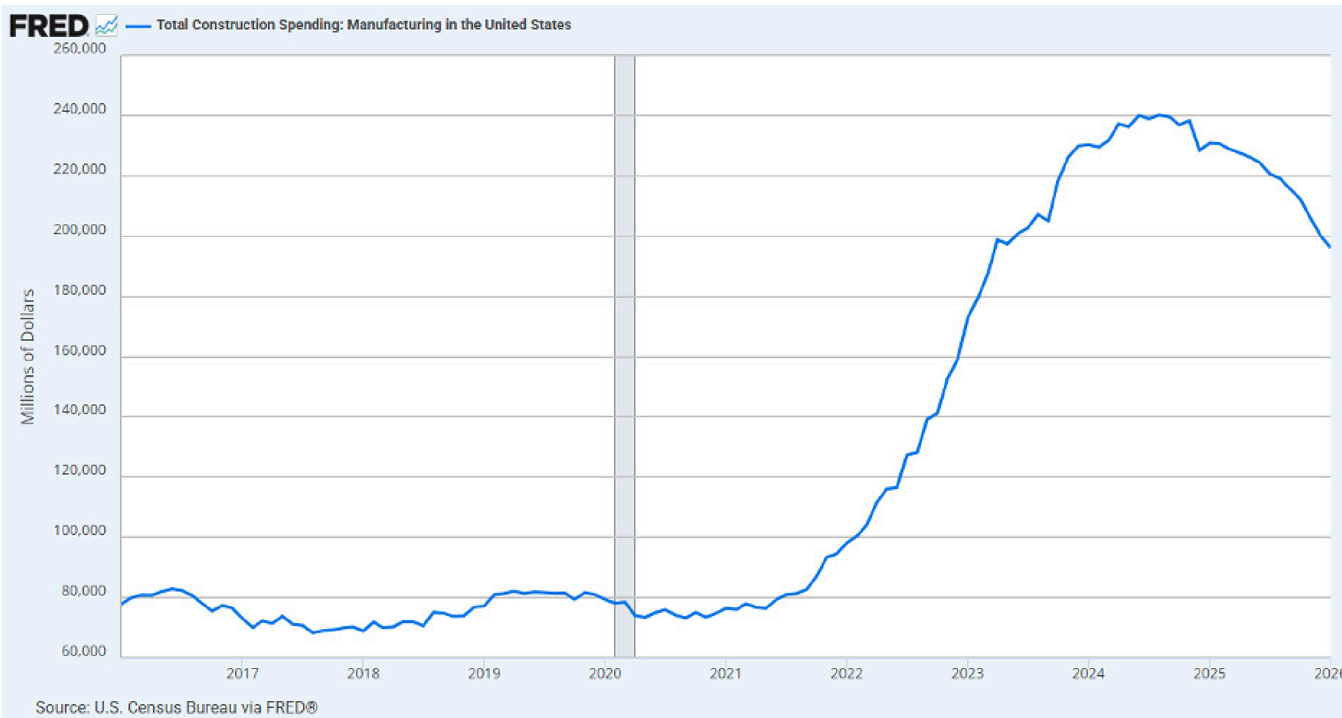
A September 2024 case study on the Ultium plant conducted by Atlas Public Policy—and which BGA contributed to—concluded that "[t]he value of good jobs was particularly noteworthy in an area that has seen a sustained decline in manufacturing over the past few decades with limited other prospects for good jobs. Workers emphasized that without the Ultium facility, they would have had to move away from their homes for even the chance at a similarly fulfilling, well-paying job with good benefits."[55]

A $2.5 billion loan from the DOE's Loan Programs Office and tax credits from the Inflation Reduction Act had been essential to the operation of the Ultium Cells facility in Ohio. The plant had become part of a broader onshoring of the electric vehicle supply chain and benefited from the 30D Clean Vehicle Tax Credit, which the OBBBA sunset early. The tax credit required vehicles to meet North American assembly, battery components, and critical minerals requirements in order to qualify. The battery cells produced at the Ultium facility went into several GM models, helping ensure they are eligible for the clean vehicle tax credit.

Just before the announcement of the layoffs, GM said in a filing that "Following recent U.S. government policy changes, including the termination of certain consumer tax incentives for EV purchases and the reduction in the stringency of emissions regulations, we expect the adoption rate of EVs to slow."[56]

Image from Ultiumcell.com of Ultium's Ohio Plant.

BLS jobs reports have shown losses in manufacturing jobs. As of March 2026, the manufacturing sector has lost nearly 80,000 jobs under Trump's second term.[57] And, given that spending on the construction of manufacturing facilities has also fallen under the current administration—from nearly $231 billion in January 2025 to just over $196 billion in January 2026—it is unlikely more jobs are on the way to replace those that have been lost.[58]



A Deep Dive into Job Impacts in the Industrial Sector

Trump made countless promises on the campaign trail that he'd reshore manufacturing jobs, open more factories, and attract new industries to the United States. Trump claimed a year ago that "jobs and factories will come roaring back into our country" under his policies.[59] But as is clear from the jobs numbers noted above, that's not reality. Those jobs will continue to decrease as the Trump administration aggressively repeals funding and cancels awards—gambling with the nation's domestic manufacturing future.

The Inflation Reduction Act and BIL injected billions of dollars into investments and tax incentives for clean manufacturing. This funding sparked over a trillion dollars in private investment and generated hundreds of thousands of manufacturing and construction jobs by incentivizing domestic content for clean technologies.[60] The laws provided funding for hundreds of manufacturing projects around the country to decarbonize heavy industry and build those clean technology components. During President Trump's first year in office, firms canceled 42 clean manufacturing projects worth $24 billion.[61]

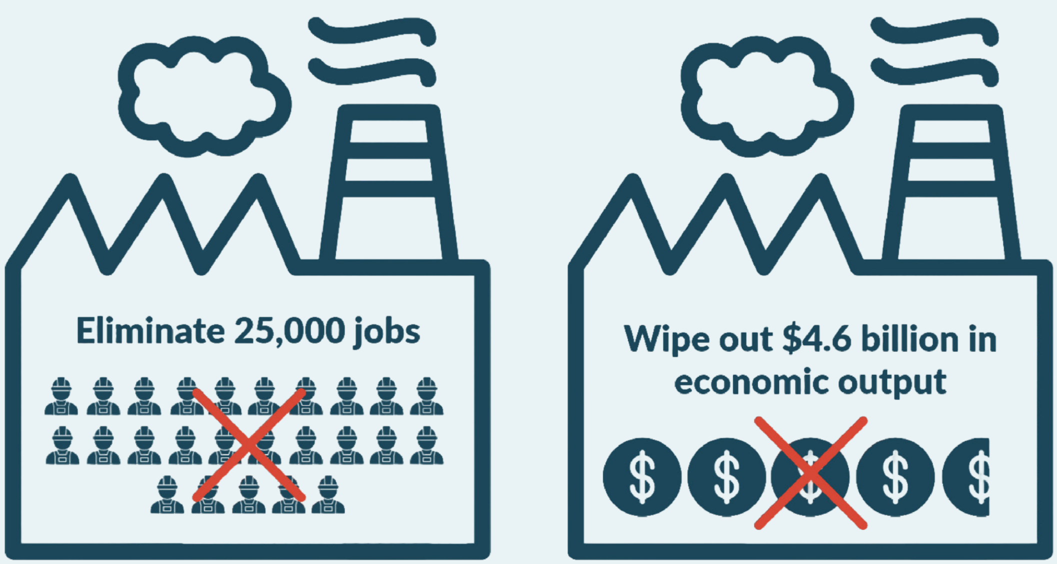
The Trump administration has repeatedly canceled legally obligated funding for projects, relying on flimsy or outright illegal rationales. Moreover, the administration has not disclosed the criteria it uses to review projects. Members of Congress have raised concerns that decisions to cancel projects were made entirely by a small group of political appointees, "based on nothing more than a one-page summary memo for each project, drafted by yet another political appointee."[62]

Twenty-four of the DOE cancellations were projects awarded by the Office of Clean Energy Demonstrations (OCED), eighteen of which were from the Industrial Demonstration Program (IDP). Research shows those cuts could eliminate a total of 25,000 jobs and wipe out $4.6 billion in economic output.[63] These aren't just numbers on a spreadsheet—they were projects designed to strengthen domestic manufacturing, accelerate innovation, and deliver benefits to communities across the country. Canceling projects for political reasons unrelated to their merit doesn't just halt funding. It kills jobs, undermines U.S. competitiveness, and erodes trust in public-private partnerships. Once industries and supply chains move overseas, history shows they are extremely difficult and costly to bring back.

As a result of these choices, the technologies the Inflation Reduction Act aimed to scale domestically will scale abroad, and the U.S. manufacturing industry will be left weaker, relying on imported solutions it once had the chance to own.[64] For example, China is making huge investments in projects like those in the IDP that Trump canceled. The country currently leads in critical sectors—such as batteries and solar—controlling more than 70% of the market and pouring billions into its supply chains.[65] China has also rapidly scaled its EV industry, currently producing 70% of global EVs.[66]

Instead of embracing clean manufacturing as the future of manufacturing, the Trump administration has built its industrial policy on a vendetta against clean energy and attempted to undermine the country's previous strides to meet growing energy demand with affordable, clean sources. The United States could be leading global supply chains in clean technology deployment; instead, the nation is falling dangerously behind and increasing our dependence on imports.

OCED PROJECT CUTS ARE EXPECTED TO:



Trump is now and has always been a union buster, but in his role as president, he has unmatched power to attack working people's rights to unionize and stay safe on the job. Through executive orders, funding cuts, and more, he has dismantled worker protections in the private and public sectors.

Hampering the National Labor Relations Board (NLRB)

The NLRB plays a central role in protecting workers' rights to organize and bargain collectively. Trump has taken several actions to weaken the agency's power, including illegally removing NLRB Board Chair Gwynne Wilcox. This functionally prevents the board from maintaining a quorum and limits its ability to issue decisions in a timely manner.

These disruptions to NLRB leadership and quorum have limited its ability to carry out its core functions, including periods where the agency couldn't issue decisions at all. Delays in decision-making have slowed the resolution of organizing disputes at critical moments, weakening workers' ability to exercise their rights. For example, one of the responsibilities of the NLRB is to oversee private sector union elections. However, NLRB-supervised elections declined in 2025 by 30% because of Trump's attacks.[75] This assault on the board's operations caused organizing campaigns to lose momentum and workers faced a greater risk when attempting to unionize.

Attacks on the Civil Service and the Structure of the Federal Government

Trump has also dedicated himself to incapacitating the portions of the federal government that either run counter to his agenda or simply do not complement it. He gave billionaire Elon Musk nearly free rein to shutter entire offices of the government; cancel grant funding; and lay off, pressure resignations from, or otherwise push out staggering numbers of civil servants leaving hundreds of thousands unemployed and critical programs too understaffed to function.[76]

The Musk-led "Department of Government Efficiency" (DOGE) was established by executive order in January 2025 and immediately took action to gut the federal workforce across multiple agencies. DOGE disregarded union contract agreements with federal unions during its hostile government takeover. They coerced deferred resignations of more than 75,000 federal employees; demanded responses from every government worker under threat of termination with no authority; illegally accessed government systems; and laid off 20,000 workers without cause, all within 45 days of being in office.[77, 78, 79, 80] These actions were deemed unlawful by a judge.

The federal government's reduction in force had a serious negative impact on worker protections. Hiring freezes and staff reductions at key enforcement agencies have affected how worker protections are delivered—ultimately shifting enforcement priorities and reducing the government's capacity to track and prosecute workplace violations.[81] Additionally, Trump has proposed deep funding cuts for agencies like the U.S. Environmental Protection Agency (EPA), U.S. Department of Labor (DOL)—including the U.S. Occupational Safety and Health Administration (OSHA) and U.S. Mine Safety and Health Administration (MSHA)—and DOE, which are critical to defending workers and protecting the environment.

In addition, Trump has attacked the collective bargaining rights of federal employees throughout his second term in office. In March 2025 he issued an executive order stripping more than a million federal workers at more than 30 federal agencies involved in national defense, border security, foreign relations, energy security, pandemic preparedness, cybersecurity, economic defense, and public safety of their collective bargaining rights.[82] In August 2025, the EPA canceled its union contracts and the U.S. Department of Veterans Affairs terminated most of its union contracts.[83] Also in August 2025, Trump issued a new executive order expanding on the March 2025 one to include additional agencies.[84]

Dismantling DEIJ to Attack Workers' and Civil Rights

Worker protections depend on a functioning federal framework that sets clear standards, enforces labor law, and ensures that workers can actively practice their rights. Recent federal actions have weakened that framework across multiple fronts.

DEIJ is one of the core ways to protect the rights of working people from discrimination, hostile work environments, and unsafe working conditions that hinder their ability to do their jobs. Trump knows this, which is why he tries so doggedly to dismantle and delegitimize DEIJ for the federal workforce. He spent months on the campaign trail and continued throughout the first days of his second term to undermine DEIJ efforts and programs across the federal government. One of Trump's first actions in office was to issue a series of executive orders rolling back DEIJ initiatives across federal agencies, including programs tied to workplace equity and anti-discrimination enforcement.[67] Those orders included the termination of DEIJ offices, positions, and programs in the federal government and targeting grants and contracts the administration determined to be DEIJ-related.[68]

Many of these programs supported enforcement strategies aimed at identifying systemic discrimination and barriers to opportunity. Enforcement capacity has been reduced, timelines for resolving cases have slowed, and agencies responsible for protecting workers are operating with fewer tools and less consistency.

Attacks on the Equal Employment Opportunity Commission (EEOC)

The EEOC is responsible for enforcing the nation's core workplace civil rights laws, and investigates discrimination based on race, sex, color, religion, national origin, age, and disability. Under the Trump administration, the EEOC has been weaponized against the workers it was designed to protect. Significantly, the commission announced it will no longer process complaints alleging disparate impact violations—a cornerstone of civil rights enforcement for over 50 years. Disparate impact violations occur when an employer institutes policies or practices that disproportionately and unjustifiably harm protected groups, regardless of intent.

The EEOC is also dismantling critical infrastructure for monitoring workplace discrimination, heavily targeting "DEI" programs and is instead focused on "reverse discrimination" and religious freedom cases. This impacts all employees and job seekers—153 million U.S. workers who benefit from EEOC protections.[69] Systemic discrimination cases are less likely to be pursued (if at all), limiting the agency's ability to address patterns of employer behavior.[70]

Federal enforcement plays a key role in ensuring that protections against discrimination and harassment are meaningful. When that enforcement is weak, accountability becomes less consistent, and the burden shifts onto individual workers to pursue claims without the backing of strong federal enforcement. Over time, this erodes confidence in the system and reduces the deterrent effect against discrimination that strong enforcement provides.[71]

Undermining the Office of Federal Contract Compliance Programs (OFCCP)

Before President Trump took office, the OFCCP was the only office tasked with ensuring that companies receiving federal contracts met baseline labor and civil rights standards. The administration quietly gutted the office within the first two months of its second term.[72] This has effectively limited the agency's ability to enforce contractor compliance, leading to:

- Reduced oversight and enforcement activity for federal contractors;
- Scaled back compliance reviews and monitoring mechanisms;
- Limitations on the agency's ability to take corrective action on labor and civil rights violations; and
- Reduced frequency and scope of compliance evaluations of federal contractors.

Reduced oversight and compliance reviews limit the federal government's ability to enforce labor standards through its contracting power.[73] Federal contracting is a major lever for shaping job quality across the economy, including in sectors like infrastructure, manufacturing, and clean energy. When enforcement is weakened, federal investments lose their ability to drive higher job quality across industries.[74] Public dollars should strengthen wages, benefits, and working conditions, not undermine them.

THE TRUMP EFFECT ON WORKPLACE SAFETY

Not only is it harder to find a good job in Trump's economy, on the job, workers' safety is being threatened due to concerted attacks on the agencies and policies meant to reduce workplace hazards. From delaying or rolling back critical workplace protections to defunding and dismantling government programs tasked with ensuring that workplaces are safe, Trump's disregard for the health and safety of working people has been a cornerstone of his labor policy.

The impact has been swift. Federal OSHA has the lowest number of inspectors in its history.[85] With the current number of inspectors at OSHA, the agency only has capacity to inspect workplaces once every 191 years.[86] These changes are already reshaping how worker protections operate. Instead of strong federal standards, protections are becoming uneven, with outcomes increasingly shaped by where a worker lives and whether states have stepped in to fill gaps. This shift carries real consequences for job quality, workplace safety, and workers' ability to organize.

In 2025, the U.S. Occupational Safety and Health Administration (OSHA) conducted 20% fewer workplace inspections. Those inspections that did occur in 2025 resulted in a 42% decrease in citations for willful violations and the lowest penalty total of the past 17 years.[87]

Trump's OSHA is doing fewer inspections but that's not all. They are also weakening respiratory protections against lead, repealing lighting requirements at construction sites, and limiting the use of the general duty clause—which requires that employers provide a workplace free from recognized hazards that are likely to cause serious injury or death.[88] OSHA has also stalled on finalizing a 2024 rule that would protect workers in the United States from heat stress and Trump's proposed budget for 2027 would cut OSHA's enforcement efforts by $33 million and end the Susan Harwood Training Grant Program, which supports training for workers and employers to prevent workplace hazards.[89, 90]

Workplace safety agencies were an early target of DOGE. In April 2025, DOGE announced the termination of 90% of the workers at the National Institute for Occupational Safety and Health (NIOSH).[91] NIOSH—which operates under the U.S. Center for Disease Control and Prevention (CDC)—is responsible for testing and certifying respirators, documenting cancer in firefighters and 9/11 first responders, and conducting research on how to prevent explosions in mines and manufacturing plants. Outrage from the labor movement and its allies forced U.S. Secretary of Health and Human Services Robert F. Kennedy, Jr, to reinstate all NIOSH workers in January of this year.[92] However, Trump's campaign to restrict the agency is ongoing. In his fiscal year 2027 budget request—released in April 2026—the president proposed cutting the CDC budget by 31%.

In the chemical industry, hard-fought protections for workers are at risk. EPA has announced that it intends to strip its Risk Management Program (RMP) of the rules that make chemical manufacturing safer.[93] The RMP is the nation's primary defense against catastrophic industrial chemical releases, fires, and explosions through preventative safety measures.[94] The EPA's proposal would eliminate provisions essential to improving the safety of industrial facilities and protecting workers, fenceline communities, and emergency responders. Under the Trump EPA's proposal, workers in hazardous facilities and the communities outside the fenceline will now lack access to vital information about what could be done to make local chemical plants inherently safer and how management aims to protect against floods, hurricanes, and other natural disasters.[95] The EPA proposal also strips the power of workers to act in an emergency to stop any process that threatens to explode or cause another type of chemical disaster.[96]

The Trump administration has taken aim at the U.S. Chemical Safety and Hazard Investigation Board (CSB), an investigative board created in 1998 to identify the root causes of oil and chemical incidents. In both his fiscal year 2026 and fiscal year 2027 budget proposals, Trump has proposed eliminating the board.[97]

Another rule that has been delayed by the Trump administration is the Silica Rule, which would protect mine workers from harmful exposure to silica dust. Exposure to silica dust is causing lung cancer, Black Lung, silicosis, and kidney disease, even in young miners. The Silica rule was finalized in 2024 by the U.S. Department of Labor and aims to lower the exposure limit of silica dust, require mine operators to use engineering controls, provide free health examinations for exposed workers, and update respiratory protection standards and practices.[98] The Trump administration's Mine Safety and Health Administration has refused to begin enforcement of the 2024 rule and has announced plans to reconsider it entirely.[99]

CONCLUSION

Trump proclaimed during an event in Kentucky that "[a]fter so many years of politicians who sold out the working men and women of our country, we finally have a president who puts American workers first."[100] Trump has put working people first on the chopping block and nowhere else. With every action of his second term, he has sacrificed working people on the altar of corporate greed and demanded to be thanked for it.

It is the job of lawmakers and leaders to address the challenges of the people who elected them. Instead, Trump and the GOP would rather ignore the crisis they've created and provide handouts and tax breaks to billionaires while the rest of the country suffers. And there is no doubt that the billionaire class is reaping all the benefits of Trump's presidency. The 15 richest people in the United States have made nearly $1 trillion in the first year of Trump's second term as president.[101] Meanwhile, working people are seeing good jobs leave their communities. They are seeing projects that had brought hope of economic revitalization shutter. They are seeing higher costs for utilities, food, medical care, and everyday necessities skyrocket while the president tells them affordability is a "hoax."[102] Their workplaces are increasingly unsafe.

Trump's agenda has cost the nation 223 clean manufacturing, energy, and industrial projects across the country—representing at least $82.8 billion in capital investment. This is not just about dots on a map; this is about the manufacturing and construction jobs that are lost or will not be created. This is about the workers that are watching a path to the middle class cut off from them at a time when costs are skyrocketing, also thanks to Trump's actions. This is about working people across the country who are trying to make a good life for themselves and their families under a federal government that does not care if they make it home safely. This nation deserves better.

Despite the damage done by Trump and the GOP Congress, the foundation created by BIL and the Inflation Reduction Act is not gone. Key tax credits, bonuses, and grant programs remain intact. These tools can still be used to support job creation, lower household energy costs, and strengthen domestic manufacturing.

BIL and the Inflation Reduction Act remain a foundation for future policy, and the progress they set in motion can still be built upon. These laws show that when we invest in workers, modernize U.S. industry, and rebuild the economy from the ground up, we can cut pollution, grow union jobs, and expand opportunity at the same time.

APPENDIX

Table A1: National and state investment and jobs totals for projects already impacted or subject to curtailed tax support[103]

	Canceled and Stalled Projects by State				
State	Projects	Investment (Billions)	Projects Counted in Investment Sum	Total Jobs	Projects Counted in Jobs Sum
Total (US)	222				
AK					
AL	2	$0.13	2	295	2
AR	1	$0.30	1		
AZ	5	$2.04	4	4,355	5
CA	18	$2.66	18	1,748	17
CO	3	$2.14	3	7,441	3
CT	3	$0.05	3	214	3
DE					
FL					
GA	6	$5.45	6	3,408	6
HI	1	$0.03	1	66	1
IA	3	$0.28	3	382	3
ID	1	$0.24	1	661	1
IL	10	$4.20	10	3,950	9
IN	5	$4.65	5	3,600	5
KS	2	$0.74	2	2,822	2
KY	6	$7.25	6	9,515	6
LA	2	$1.88	2	368	2
MA	2	$0.01	2	31	2
MD	4	$4.57	4	559	4
ME	3	$0.08	3	198	3
MI	14	$7.00	14	7,646	13
MN	1	$0.29	1	200	1
MO	3	$1.25	3	2,031	3
MS	1	$0.50	1	2,000	1
MT	2	$0.56	2	1,881	2
NC	6	$3.09	5	1,714	5
ND	1	$0.57	1	112	1
NE	2	$0.59	2	126	2
NH					
NJ	1			200	1
NM	5	$2.66	5	6,472	5
NV	3	$1.45	3	1,322	3

NY	22	$3.43	22	6,283	20
OH	20	$6.22	18	5,896	18
OK	6	$2.10	6	902	6
OR	1	$0.03	1	125	1
PA	4	$0.78	4	1,960	4
RI					
SC	4	$1.86	4	1,171	4
SD					
TN	4	$3.92	4	4,320	4
TX	33	$8.05	33	24,517	33
UT	1	$0.01	1	22	1
VA	6	$1.03	6	2,199	6
VT					
WA	1	$0.02	1	20	1
WI	2			400	2
WV	1	$0.15	1	600	1
WY	1	$0.17	1	33	1

Data gathered from BGM, CET, CIM, E2, and EIA reports. See endnotes for full citations. Investment and job counts display the number of records relevant to the associated sum; not all projects have investment or jobs data. Sites that span states or have no state information are omitted.

Table A1 Continued

	Sites Facing Curtailed Tax Support by State				
State	Sites	Investment (Billions)	Sites Counted in Investment Sum	Total Jobs	Sites Counted in Jobs Sum
Total (US)	3,025				
AK	5	$0.61	5	292	5
AL	32	$5.32	28	7,607	24
AR	34	$9.02	32	7,045	27
AZ	89	$28.96	79	77,339	81
CA	328	$50.88	281	126,155	245
CO	55	$6.94	51	14,065	46
CT	18	$0.78	16	2,738	15
DE	15	$0.29	15	761	15
FL	61	$5.04	57	15,697	57
GA	67	$42.47	55	56,369	51
HI	23	$0.89	22	2,605	22
IA	44	$4.87	42	1,865	11
ID	9	$1.78	9	3,348	8
IL	222	$18.74	211	23,615	206
IN	56	$19.97	50	25,444	47
KS	13	$6.28	11	6,488	11
KY	47	$9.50	41	13,806	41
LA	48	$41.85	46	15,620	45
MA	43	$1.56	38	6,879	37
MD	18	$0.31	17	912	15
ME	26	$5.28	26	5,106	26
MI	84	$23.42	71	33,850	66
MN	37	$3.02	33	3,781	26
MO	24	$5.01	21	10,363	20
MS	27	$4.34	26	8,061	25
MT	10	$1.53	7	2,916	7
NC	77	$22.16	70	15,650	68
ND	15	$3.00	14	3,172	10
NE	16	$2.80	12	403	3
NH	4	$0.03	2	73	2
NJ	29	$0.11	27	293	27
NM	59	$16.50	58	13,137	56
NV	61	$28.75	49	47,377	45

NY	181	$13.63	174	22,623	175
OH	73	$23.31	65	22,252	61
OK	26	$5.15	17	7,300	16
OR	30	$12.69	27	35,206	26
PA	92	$4.78	82	8,827	84
RI	2	$0.06	2	137	2
SC	69	$15.82	62	24,001	59
SD	22	$2.22	22	1,048	6
TN	51	$20.23	46	12,643	46
TX	537	$161.25	496	381,949	480
UT	48	$14.23	40	38,572	34
VA	59	$19.45	59	20,368	59
VT	4	$0.14	4	396	4
WA	31	$7.50	23	21,846	21
WI	51	$4.69	42	13,096	44
WV	27	$3.72	25	3,456	25
WY	26	$12.83	18	17,061	13

Data gathered from BGM, CET, CIM, E2, and EIA reports. See endnotes for full citations. Investment and job counts display the number of records relevant to the associated sum; not all projects have investment or jobs data. Sites that span states or have no state information are omitted.

Table A2: Sourcing of investment and jobs figures presented in this report

	Investment		Operations Jobs*		Construction Jobs	
Source	**Freq.**	**%**	**Freq.**	**%**	**Freq.**	**%**
Manufacturing Sector Projects						
BGM	104	12.4%	62	7.4%		
CET	148	17.7%	145	17.3%		
CIM	151	18.0%	110	13.1%	30	3.6%
E2	43	5.1%	31	3.7%		
Multiple sources	108	12.9%	160	19.1%		
No data	283	33.8%	329	39.3%	807	96.4%
Energy and Industry Sites						
CET	89	3.6%	1661	66.7%	2264	90.9%
CIM	2375	95.4%	51	2.0%	26	1.0%
E2	1	0.0%	1	0.0%		
No data	25	1.0%	777	31.2%	200	8.0%

Data source contributions are listed under their own row for the statistic in question when they are either the minimum of a set of multiple estimates or the only estimate for the statistic in question. Locations with multiple identical estimates from different data sources are listed in "multiple." Percentages are calculated out of records that have data for at least one of these statistics, 837 and 2,490 for manufacturing and energy and industry, respectively. Our dataset has 2,548 manufacturing sites and 9,366 energy and industry sites.

*Note that in the context of manufacturing sites and projects, "operations jobs" are referred to as "manufacturing jobs" in this report.

METHODOLOGICAL NOTE

Our counts as well as our investment and jobs totals for impacted manufacturing, energy, and industrial projects and sites are based on a database assembled by the BGA Research team and represent our current best estimates. Our database contains over ten thousand sites where clean energy technologies are either produced or deployed. The records include job creation expectations from company announcements and capacity-based estimates, investment estimates derived from a mix of company reports and estimates based on project characteristics, and an operational history recorded from public announcements. We then relate each of these sites to the Inflation Reduction Act tax credits for which they are eligible to illustrate how changes to the tax code made by the OBBBA could be felt locally. In this report, “canceled or stalled projects” are counted at sites that have had an observed adverse operational outcome since Trump’s 2nd inauguration: their operational status is canceled or stalled and we know they entered that status since 1/19/2025. The broader set of “sites subject to stricter tax eligibility requirement” are those whose operational status is planned/in development or operating and for whom support in the tax code has been curtailed by OBBBA. These categories are mutually exclusive.

To assemble our database, we harmonize location records from the following datasets: Rhodium-MIT’s Clean Investment Monitor, Atlas Public Policy’s Clean Economy Tracker, Wellesley College’s Big Green Machine, E2’s Clean Economy Works Project Tracker, electricity generator data from the U.S. Energy Information Administration, and BGA’s in-house dataset on the electric vehicle supply chain. We match locations across these datasets by project and site characteristics to avoid double counting and to make maximum use of the information tracked by these collaborators. While we do our best to review our data, it is possible that errors from our source data or other errors could be reflected in our database.

In about half of the cases, we have multiple investment or job creation estimates for the same location. Since we are combining numbers recorded by multiple research groups over four years, we expect some variation here. Generally, there is agreement between sources. Nonetheless, we take a conservative approach by selecting the minimum among each set of expected operational job creation estimates and announced investment estimates. It is also worth noting that inflation partially impacts our investment numbers: CIM’s figures have been inflation adjusted to 2023 dollars, but all other investment figures are reported in nominal terms. Table A2 reports the relative contribution of source datasets to each of the investment and jobs statistics in the report.

To assess how the operation of these locations is being affected by changes to Inflation Reduction Act tax credits passed in OBBBA, we identified 32 distinct types of changes to a core set of tax credits and associated locations with any type of change they are likely to experience based on their products and operational timelines. These changes include tighter deadlines to qualify, risk of ineligibility due to early credit termination, faster phase-down schedules, eliminated bonus rates, and/or significantly expanded Foreign Entity of Concern restrictions. The tax credits whose OBBBA modifications we include in our scope include: the clean energy investment and production tax credits and their technology neutral successors (ITC/PTC 48 and ITC 48E and PTC 45Y); the Carbon Oxide Sequestration Credit (45Q); the Clean Hydrogen Credit (45V); the Zero-emission nuclear power production credit (45U); the Clean Fuel Production Credit (45Z); the Qualifying Advanced Energy Project Credit (48C); the Advanced Manufacturing Production Credit (45X); and the Clean Vehicle Tax Credit (30D). We assume that most projects that would’ve qualified for the tax credit would’ve expected to use it and are now confronting sometimes drastic changes to the terms of these subsidies.

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