



**WASHINGTON WIRE**

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### **Supreme Court Ruling on Tariffs**

In a significant check on executive authority, the Supreme Court ruled 6–3 that President Trump exceeded his power by imposing broad tariffs under the International Emergency Economic Powers Act (IEEPA), striking down his “reciprocal” country-by-country tariffs and a 25 % fentanyl-linked tariff on Canada, Mexico, and China.

Chief Justice John Roberts, citing the “major questions doctrine” wrote for the majority, emphasized that IEEPA does not authorize presidents to impose tariffs and that Congress has not clearly granted that power, noting that emergency trade regulation does not inherently include taxing authority. The doctrine recognizes that Congress must clearly authorize decisions of vast economic and political significance before delegating such power to the executive.

The ruling invalidates the contested IEEPA tariffs but leaves tariffs under other statutes intact. Trump may try to reimpose tariffs under alternative statutory authority. And the decision also opens the door for companies to seek substantial refunds, potentially exposing the U.S. Treasury to significant financial liabilities.

Following the Supreme Court decision, the White House immediately announced implementation of Section 122 tariffs to levy a 10% across the board tariffs, with the President indicating a possible 15% rate. However, this has not been implemented. Use of the Section 122 tariffs has a 150-day limit.

NAED will continue to monitor and report on developments around tariff policy. However, we expect the next actions to transpire in the Court of International Trade, where formal opportunities for stakeholders to engage will be limited.

Should the Administration continue to pursue additional Section 301 or 232 levies, there will likely be opportunities for public comment.

## **Energy Funding & EnergyStar**

Congress passed, and the President recently signed a fiscal 2026 spending “minibus” which funded nearly all government activities, and among other things, provides \$49 billion for the Department of Energy. This softened the proposed blow recommended by the Trump administration, which sought deep cuts to many of the Department’s activities.

The compromises provide clean energy offices with moderate reductions, with Congress redirecting billions toward advanced nuclear projects and electric grid upgrades. Funding shifts signal congressional concern about reliability, supply chains, and rising electricity demand. Most notably, the EnergyStar program was salvaged, receiving about \$33 million through the Environmental Protection Agency.

NAED joined a coalition of trade associations pushing to save the program from elimination. For electrical distributors and manufacturers, maintaining ENERGYSTAR funding means ongoing support for tools like performance testing, certification processes, and educational outreach that help end-users choose more efficient equipment.

## **Greenhouse Gases Rollback**

The Trump administration recently announced a repeal of the 2009 endangerment finding, which was a formal determination that greenhouse gas emissions threaten public health and welfare. The endangerment finding was issued two years after a 2007 Supreme Court ruling that greenhouse gases qualify as air pollutants under federal law.

During the announcement, President Trump was joined by EPA Administrator Lee Zeldin to formalize the rescission, calling it the largest deregulatory action in American history. The finding underpins numerous federal climate rules and provides the basis for regulating emissions under the Clean Air Act.

Repealing the finding could dismantle federal emissions standards for cars and trucks as well as power plants. Administration officials argue the rollback will reduce regulatory burdens and lower vehicle costs for consumers, framing the move as part of an affordability agenda. EPA officials have said that without the endangerment finding, the agency would lack statutory authority under the Clean Air Act to set motor vehicle emissions standards and power plants.

## **Sonepar Creates Veterans Video**

During a RecruitMilitary and Disabled American Veteran event in Texas, Sonepar's Chris Miles, the company's Military and Veteran Relations Manager, and Alex Williams, a Gear Product Specialist, recorded a video highlighting their effort to support transitioning service members and the need for a qualified workforce in the electric equipment supply chain. Chris uses the opportunity to highlight how legislative efforts like the VET Act help address these challenges. To view the video, [visit this site](#).

## **Study: Energy Trends and Electrification**

The [Sustainable Energy in America Factbook 2026](#), produced by BloombergNEF in partnership with the Business Council for Sustainable Energy, finds that U.S. sustainable energy largely held its ground in 2025 despite policy rollbacks, tariff volatility, and rising electricity demand. Electricity consumption rose 2%, driven primarily by rapid data-center growth, while grid investment hit a record \$115 billion. Clean technologies dominated new power capacity additions, led by solar and battery storage, even as natural gas and coal generation rebounded to meet load growth. Energy transition investment reached \$378 billion, with grid spending and electrified transport offsetting flat renewables investment.

Electrification remains a central theme of the findings, and the report notes that EV sales hit a record of 1.6 million vehicles. Electricity demand from data centers surged 18%, and electrification of industry and buildings contributed to sustained load growth.

The report notes that some headwinds are likely to impact electrification with the elimination of federal support for EVs, charging, and efficiency tax credits (25D, 25C, 45L, and 179D) under the One Big Beautiful Bill Act. However, what is not measured are efforts from states to provide additional incentives in the absence of federal support. For example, some states have increased rebates for EV charging infrastructure and heat pump adoption.

## **Rare Earths & Critical Minerals Policy**

The Trump Administration announced the creation of [Project Vault](#), a plan to establish a strategic reserve of rare earth elements and critical minerals, deploying nearly \$12 billion to reduce U.S. dependence on China. The initiative would begin with a \$10 billion loan from the Export-Import Bank and roughly \$1.7 billion in private capital. The reserve is designed to mirror the Strategic Petroleum Reserve, stockpiling minerals such as gallium and cobalt used in vehicles, electronics, batteries, and defense systems.

The move follows China's export curbs and its dominance of global mining and processing capacity. Manufacturers would commit to future buyback agreements, while private commodities firms would manage procurement. The plan has attracted interest from U.S. automakers and technology companies and boosted shares of domestic rare earth miners amid expectations of stronger demand and government-backed financing. The Administration has also pursued supply diversification through international partnerships and new domestic processing facilities.

In addition to Project Vault, the administration urged 50 countries and the EU to join a U.S.-led critical minerals trading bloc to counter China's dominance in mining and processing of critical minerals. Vice President Vance pitched a nonbinding framework. The plan, dubbed the "Forum on Resource Geostrategic Engagement," or FORGE, features price floors and prices enforced by tariffs to stabilize markets and protect allied producers. The plan would identify priority projects within six months, replace a Biden-era partnership, and complement U.S. stockpiling and financing. Allies voiced support in both efforts, and skeptics raised concerns over unintended consequences of government-directed market interventions.

## **Robotics Policy**

A bipartisan group of House lawmakers plans to introduce legislation creating a national robotics strategy. The bill would establish an 18-member national robotics commission, drawing experts from industry, government, and academia to guide federal policy. The effort coincides with Trump administration actions, including meetings between Commerce Secretary Howard Lutnick and robotics and manufacturing CEOs, and a planned listening session with stakeholders.

Supporters argue robotics will transform factories, warehouses, and the U.S. workforce, while warning that China's heavy investment and ability to manufacture low-cost hardware at scale threaten U.S. competitiveness and necessitate government action. Industry leaders caution that the U.S. risks repeating the drone industry's decline if policymakers are not established quickly enough.

They also argue that leaning into robotic proliferation will strengthen manufacturing, boost productivity, and support reshoring by complementing workers, especially in labor-short industries. Skeptics still worry about the effects of job displacement and how to mitigate short- and long-term effects of robotic transformation.