



Congressional Budget Justification

Fiscal Year 2027

Executive Summary

The Administration requests \$77 million in FY 2027 for the U.S. Trade and Development Agency (USTDA) to advance the shared strategic infrastructure priorities of the United States and its overseas partners while creating U.S. export opportunities.

USTDA is the U.S. government's first mover on the development of emerging market infrastructure projects that advance U.S. national security priorities. As described in greater detail below, in FY 2027 USTDA will advance U.S. national security priorities by funding activities that, among other priorities, increase America's access to critical minerals, strengthen U.S. energy dominance, extend American leadership in artificial intelligence by developing foundational digital infrastructure, and further U.S. global leadership in emerging technologies that are tied to its national security.

The Agency funds feasibility studies, technical assistance, and pilot projects that accelerate the development of strategically important overseas infrastructure projects, helping them attract the financing they need for implementation and procurement of trusted U.S. goods and services that support U.S. jobs. USTDA also hosts activities that promote infrastructure partnerships with the United States.

For more than three decades, USTDA has utilized its specialized experience and unique toolkit to generate quantifiable results. In FY 2025, on average, the Agency's activities generated \$226 in U.S. exports for every Congressionally appropriated dollar. USTDA will continue to prioritize industries with strategic value to the United States and its overseas partners and that hold significant U.S. export potential including critical minerals, digital, energy and transportation infrastructure.

In consideration of the aforementioned, a budget of \$77 million for FY 2027 would continue USTDA's considerable track record of advancing U.S. national security interests while facilitating U.S. jobs through exports.

Results for American Taxpayers

The Agency has an exceptional record of deploying trusted U.S. solutions to America's global partners. As of FY 2025, USTDA's program generated an average of \$226 in U.S. exports for every dollar it programmed. Since its inception in 1992, the Agency has facilitated \$127 billion in U.S. exports to the infrastructure projects it has supported in emerging markets. These projects benefit America's taxpayers and prosperity by helping companies create good-paying jobs across the United States, including small businesses from approximately 380 communities.

America-First Decision-Making to Achieve Statutory Mission

USTDA achieves its statutory mission by taking an America-first approach to decision-making that benefits the United States and emerging markets. All program funding decisions include the following critical factors:

Mutual Strategic Priority: USTDA's threshold consideration is whether an infrastructure project directly advances a strategic priority of the United States and its partner country. The Agency works with qualified public and private sector entities overseas that are committed to working in partnership with the United States.

Priority Industries: Industries of strategic interest include critical minerals, digital infrastructure, energy and transportation. USTDA also advances projects that further America's global leadership in emerging technologies.

U.S. Export Potential: USTDA supports American jobs by funding projects that can generate significant U.S. exports of goods and services. The Agency works alongside U.S. industry to deploy trusted American technology to the overseas infrastructure projects that it supports.

Financing: USTDA considers projects that have a strong likelihood of receiving implementation financing from private banks, multilateral development banks and U.S. government partners like the Export-Import Bank and Development Finance Corporation.

USTDA partners with financial institutions to help projects meet their lending requirements. This approach facilitates deal flow, mitigates project risks, and increases the likelihood that USTDA's projects are financed and implemented. The Agency's work also helps overseas partners avoid the predatory lending practices of malicious actors like China.

Executing an America First Agenda

USTDA supports the development of overseas infrastructure projects that advance the shared strategic priorities of the United States and its partner countries. The Agency's America First programming is designed to increase America's access to critical minerals and rare earth elements, unleash U.S. energy dominance through the export of American advanced nuclear reactor technology and liquefied natural gas (LNG), secure America's global artificial intelligence (AI) leadership, and secure transportation linkages to defend the homeland.

Increasing Access to Critical Minerals

Executive Order: Unleashing America's Offshore Critical Minerals and Resources

*"...the Director of the **Trade and Development Agency**, and the heads of other relevant agencies shall ... [identify] tools to support ... international seabed mineral resource exploration, extraction, processing, and environmental monitoring." - April 24, 2025*

USTDA will advance U.S. national security by increasing America's access to critical minerals that are essential to maintaining U.S. technological superiority in the defense and commercial sectors. The Agency will reduce China's stranglehold on critical supply chains by developing infrastructure and building global partnerships that channel raw and processed critical minerals to the United States.

USTDA is implementing a custom-developed solution to help the U.S. government address one of the biggest short-term challenges to accessing overseas critical minerals: where to start. The Agency recently developed a matrix to help navigate options, factoring various legal, regulatory and diplomatic considerations in potential partner countries where these minerals can be found. The matrix prioritizes countries with the highest percentage of mineral reserves of interest to the United States and the fewest regulatory obstacles for investment.

USTDA will support projects across the complete mining life cycle in high-priority markets to secure America's supply chains for critical minerals and rare earth elements in the short- and long-term. These investments may include greenfield mines, mine expansion, mine reopening, and mineral refinement and processing. USTDA will focus its efforts on activities that generate the greatest returns for the security, stability and prosperity of the American people.

Zambia: Expanding Cobalt and Copper Production

USTDA is accelerating the development of a Zambian mine that could produce up to 25,000 additional metric tons of copper and cobalt concentrates. The Agency approved feasibility study funding that will include a resource assessment, identify and connect U.S. off-takers to the project, and help catalyze private investment through technical, economic, and financial analyses. USTDA's local partner is Metalex Africa Zambia Ltd.

Overseas mining operations require a reliable source of power and efficient transportation and logistics infrastructure to deliver critical minerals to the United States. To enable greater U.S. access to these minerals, USTDA will fund the most vital ancillary infrastructure development activities in areas including power generation and transmission, railroads and ports.

USTDA's project preparation toolkit is unsurpassed in its breadth and capability to unlock financing. The Agency can support overseas critical minerals development and supply chain security through a wide range of activities including resource mapping, drilling, resource confirmation, front-end engineering design, pre-feasibility studies, feasibility studies, pilot projects, and transaction assistance (legal, financial, offtake negotiations). While drilling and early-stage exploration activities are costly and difficult to resource, USTDA can leverage its funding to build partnerships to fill market gaps in equity funding that impede U.S. access to critical minerals.

Unleashing American Energy

USTDA has targeted its business development and programming efforts to help achieve American energy dominance, with particular focus on advanced nuclear power and liquefied natural gas. During President Trump's first term, the Agency built a lasting foundation for advancing exclusive infrastructure partnerships that advance U.S. national security priorities while facilitating U.S. exports in both critical industries.

Advanced Nuclear Power

Executive Order: Deploying Advanced Nuclear Reactor Technologies for National Security

Calls for the determination of a strategy which addresses:

- *"increasing the effectiveness of the **United States Trade and Development Agency**, as consistent with law, by expanding grant financing for United States nuclear technology pilots, fuel supplies, and project preparation to recently graduated high income economies of national strategic interest"*
- *"holding trade missions and **reverse trade missions** and leveraging other trade promotion tools to remove trade barriers and increase the market competitiveness of the United States nuclear industry" - May 23, 2025*

USTDA is addressing a top national security priority by helping reinvigorate America's nuclear industrial base. The Agency partners across the U.S. government and with U.S. industry to counter state-sponsored, subsidized competition from China and Russia and expand America's global leadership in the deployment of next-generation nuclear reactor technology. Under the first Trump Administration, USTDA began the legwork for nuclear power projects that are now capturing global attention for their ambition, remarkable progress and demonstration of U.S. leadership.

The Agency will build upon this record work by initiating the development of a full range of overseas nuclear energy projects in coordination with its U.S. government, U.S. industry, and overseas project partners. Potential projects include advanced nuclear reactor deployment, waste management and plant decommissioning.

USTDA offers the full slate of tools required to develop these projects, including legal and regulatory analysis, site surveys, technology selection, feasibility studies and front-end engineering design studies.

Romania: Small Modular Reactor Power Plant Studies

USTDA technical assistance in 2020 led to Romania's selection of U.S. technology for Europe's first small modular reactor power plant. A subsequent USTDA FEED study resulted in U.S. industry winning major engineering contracts for the project. These activities are helping to mobilize financing, including \$98 million from the Export-Import Bank of the United States for pre-project services.

Poland: Advanced Nuclear Power FEED Study

USTDA co-funded a 2020 FEED study to initiate the development of Poland's first nuclear power plant. This led to Poland's selection of Westinghouse Electric Company and Bechtel for a large-scale contract to design and build the power plant using Westinghouse AP1000 technology. The Polish government subsequently announced its intent to allocate approximately \$15 billion to the project, which will support thousands of American and Polish jobs. In August 2025, Poland completed the first phase of in-depth geological surveying at the future site of its nuclear power plant.

Natural Gas

Executive Order: Unleashing Energy Dominance

"Protecting America's National Security. (a) The Secretary of Energy is directed [to] restart reviews of applications for approvals of [liquefied] natural gas export projects as expeditiously as possible..." – January 20, 2025

The export of natural gas is a vital component of America's energy dominance goal. USTDA is advancing this priority through its role as the U.S. government's first mover on the development of overseas infrastructure projects that can facilitate the procurement of American gas by key partner countries.

During President Trump's first term, USTDA launched its U.S. Gas Infrastructure Exports Initiative to develop overseas gas infrastructure that would facilitate the export and utilization of U.S. liquefied natural gas. The initiative generated outstanding results and helped solidify U.S. global leadership in the natural gas sector.

USTDA will build on this foundation to further advance U.S. national security goals. The Agency will target the development of priority overseas infrastructure projects in areas including import terminals; LNG regasification; gas processing, storage, transmission and distribution; and gas-to-power plants.

Nigeria: LNG Liquefaction and Distribution Factory Study

Nigeria’s Green Liquefied Natural Gas Limited (GLNG) is using innovative U.S. technology to develop an LNG processing and distribution facility in southwestern Nigeria as the result of a 2020 USTDA feasibility study. USTDA’s study helped mobilize Naira-based financing through Nigeria’s InfraCredit, a novel approach that gave GLNG access to domestic debt capital markets for the first time. Using goods and services from suppliers in Michigan, South Carolina, and Texas, the project will allow GLNG to deliver fuel to end-user customers in areas without sufficient gas pipeline infrastructure.

Türkiye: Gas Transit and Trading Hub Reverse Trade Mission

To support Türkiye’s gas industry development plans, USTDA funded a 2017 reverse trade mission to the United States to familiarize its industry leaders with U.S. technologies, services, and policy practices. The visit contributed to the streamlining of the country’s regulations for private companies to procure “spot” LNG, enabling the immediate or short-term delivery of LNG based on the latest market pricing. The visit also led to new U.S. LNG exports to Türkiye.

Securing America’s Global AI Leadership

Executive Order: Promoting the Export of the American AI Technology Stack

“It is the policy of the United States to preserve and extend American leadership in AI and decrease international dependence on AI technologies developed by our adversaries by supporting the global deployment of United States-origin AI technologies.” – July 23, 2025

American leadership in artificial intelligence is a priority for its national security, global competitiveness and economic growth. The export of U.S. AI and the underlying digital infrastructure that enables its proliferation will help ensure America’s technological dominance while reducing global reliance on alternatives from its adversaries.

USTDA will support the overseas deployment of end-to-end American AI packages including hardware, data systems, AI models, cybersecurity measures, and applications for critical sectors like energy and transportation.

Thailand: AI for E-Commerce

USTDA is extending American AI leadership and countering malign influence in the digital economy by bringing U.S. AI technology to e-commerce in Thailand and across Southeast Asia. In 2026, USTDA funded a pilot project to demonstrate how a Washington-based AI solutions provider can integrate its advanced generative AI and cloud solutions into a Thailand-based e-commerce platform.

America's partner countries require foundational infrastructure to support digital services including AI. The integrity and security of these services require this infrastructure to be built using trusted technologies from the United States. This is another vital area where USTDA plays a catalytic role in strengthening U.S. national security.

In emerging markets around the world, USTDA is the U.S. government's first mover on the development of digital infrastructure projects that align with U.S. national interests, including subsea fiber optic cable systems, 5G networks, data centers and cybersecurity. The Agency's longstanding partnerships with U.S. industry and project preparation mission help facilitate the deployment of technology that the world can trust for their most sensitive infrastructure.

Sub-Saharan Africa: Medusa Africa Subsea Cable System

A USTDA study will assess the viability of extending the Medusa Submarine Cable System, which will operate in the Mediterranean Sea, to Africa's Atlantic coast. This project will strengthen the resilience of global communications networks and support long-term partnerships aligned with U.S. values and interests. It will also deny China the opportunity to surveil and exfiltrate data from a system that 22 African countries would use to carry sensitive financial, commercial and government information.

Strengthening Security through Transportation Infrastructure

Global transportation networks that link to the United States must be safe and secure to protect the homeland. Certain modes, like freight rail, ports and maritime traffic, are essential for increasing U.S. access to critical minerals in regions like Africa and the Indo-Pacific. At the same time, emerging technologies such as unmanned aircraft

systems (i.e., drones) will reshape the future of aviation and transform industries including logistics and emergency response. Across these areas, maintaining technological superiority while challenging China's adversarial control over global supply chains will be vital to strengthening America's national security interests.

Executive Order: Unleashing American Drone Dominance

*"...the Director of the **Trade and Development Agency** shall ... prioritize and support the export of United States-manufactured civil [unmanned aircraft systems] and related systems..." - June 6, 2025*

USTDA will prioritize the development of transportation infrastructure projects that have a direct link to U.S. national security priorities in areas such as airports and aviation, AI for intelligent transportation systems, ports, rail, and other logistics infrastructure.

Honduras: Port Expansion and Intermodal Rail Terminal

USTDA is helping provide the United States with an alternative to the Panama Canal while denying the Chinese Communist Party a foothold in a critical Central American transportation corridor. USTDA approved project development funding to help catalyze investment to relieve existing port bottlenecks on Honduras's Atlantic and Caribbean coasts, the first step in creating an Interoceanic Logistics Corridor that would enhance critical supply chains, strengthen U.S. trade routes and establish American rail standards throughout the country.

Philippines: Luzon Economic Corridor Rail Project

USTDA is funding technical assistance to prepare the development of the Subic-Clark-Manila-Batangas Railway, a proposed 132-mile rail line connecting three major ports that are vital to trade in Southeast Asia. This assistance will also position U.S. companies to export goods and services for the line's construction. In 2024, USTDA supplanted China's lead role in the development of this strategic major railway project, which comprises a key component of the Philippines' Luzon Economic Corridor, a vital economic hub for the country.

Countering Economic Adversaries

USTDA advances U.S. national security by developing overseas infrastructure projects that are strategically important to the United States and its overseas partners. A critical component of the Agency's work is creating opportunities for trusted American technology to be selected over the alternatives from America's competitors in priority industries including critical minerals, digital, energy, and transportation infrastructure.

The Agency witnesses the fierce competition for these projects from China's government-backed companies and other economic adversaries that encroach on U.S. national security interests, especially in areas such as critical minerals and artificial intelligence, where technological dominance is critical to U.S. national security.

USTDA's project preparation and partnership-building toolkit, described in Appendix II, is critical toward countering America's economic adversaries and meeting critical national security objectives across these industries.

Proposed Program Budget Allocations

The tables below represent proposed amounts of funding by region, industry, and tool in FY 2027.

Region	
Latin America and the Caribbean	\$10,000,000
Indo-Pacific	\$16,000,000
Sub-Saharan Africa	\$12,000,000
Middle East/Europe/Eurasia	\$10,000,000
Global Programs	\$3,000,000
Monitoring and Evaluations	\$1,500,000
TOTAL	\$52,500,000

Industry	
Critical Minerals	\$15,000,000
Digital Infrastructure	\$12,000,000
Energy	\$19,000,000
Transportation	\$5,000,000
Other	\$1,500,000
TOTAL	\$52,500,000

Tools	
Feasibility Studies	\$12,000,000
Technical Assistance	\$8,000,000
Pilot Projects	\$8,000,000
Project Scoping	\$6,000,000
Transaction Incentives	\$5,000,000
Reverse Trade Missions	\$8,000,000
Industry Events	\$5,500,000
TOTAL	\$52,500,000

Operating Expenses

USTDA requests \$24.5 million in operating expenses for fiscal year 2027, which is equivalent to USTDA's O/E budgets in FYs 25 and 26, to support the responsible programming of USTDA's realigned programming goals. The proportional share of OE spending remains consistent with the level necessary to facilitate the employment of the personnel and services to effectively program and efficiently manage the requested \$62.5 million in program funding and continue to build on progress and identify further opportunities to improve program efficiency.

Data and Technology

USTDA is focused on enhancing service delivery and improving the Agency's data and technology architecture with the establishment of a data transformation effort. During FY 2027, USTDA will be in the final stages of deploying and testing its new management information system. Likewise, USTDA will have fully deployed its digital contract management system that will ensure greater efficiencies in government contracting and reduce the potential for waste, fraud and abuse possible in a paper-based system.

IT Infrastructure and Cybersecurity

USTDA remains focused on delivering secure federal services and managing the business of government. USTDA has prioritized its efforts by keeping mission resilience at the center of its IT modernization and cybersecurity efforts. USTDA has completed a comprehensive refresh of its network infrastructure in support of cybersecurity improvements and continued movement toward a zero-trust architecture and its principles, while also adding a scalable modular design. Some of these improvements include implementing SPLUNK Enterprise, a Security Information and Event Management (SIEM) system, replacing end-of-life infrastructure devices with intelligent switches/routers and next generation firewalls.

USTDA's IT efforts in fiscal year 2027 are focused on increasing mission resilience and continuing to modernize the Agency's infrastructure to meet specific cybersecurity standards and objectives. This will enhance the ability of USTDA to focus on its mission, service and stewardship. By further investing in secure cloud solutions, as well as identifying contemporary enterprise tools that will integrate with current agency tools and business objectives, USTDA will further strengthen, mitigate, and reduce cybersecurity challenges and gaps by replacing systems that have reached end of life or end of service.

In fiscal year 2027, USTDA will continue fostering its collaboration and engagement with DHS/CISA on the Continuous Diagnostic and Mitigation (CDM) program to enhance and implement new technologies and capabilities available through the shared security initiatives and to continue to build on progress toward Zero Trust Architecture.

USTDA will also assess and implement improvements to its data management systems in a phased approach to best position the Agency in the areas of project management, data management, and information sharing by implementing solutions identified during the fiscal year 2024 assessment project. These focused investments in infrastructure and data capacity needs will further enable USTDA to collect, analyze, and share evidence to strengthen decision-making.

Interagency Partnerships

USTDA will continue to leverage the effectiveness and efficiency of shared services and maintains many service agreements with other Federal government agencies, including the Department of State, the General Services Administration, Department of Interior, and the Department of Homeland Security.

USTDA is engaged with GSA in planning the transition to the government-wide e-travel service ETSNext. USTDA has also included funding in the proposed budget to continue its active utilization of shared services and will work to identify new shared services opportunities.

The Budget includes \$25,000 to support the transition to the U.S. Office of Personnel Management's consolidated Core Human Capital Management (Core HCM) system, which will consolidate outdated and inefficient human resources systems into a single, modern Core HCM platform. This single, modern platform will encompass personnel action processing, employee system of record, position management, and workforce analytics, among other human resource functions. This amount includes estimated licensing fees for the new system, data migration, and warehousing of legacy data.

A breakdown of USTDA's OE FY 2025 Enacted Budget, FY 2026 Expected Budget, and FY 2027 Proposed Budget is attached in Appendix I to this Budget Justification.

Representational Funds

In addition to its operating expenses, USTDA requests a representational fund of \$5,000. As a foreign assistance agency, it is essential that USTDA's representational funds be sufficient to allow the Agency to operate appropriately in diplomatic environments. These funds support the extensive work the Agency engages in overseas, as well as local outreach and related programs that bring emerging market decision-makers together with the U.S. business community in fulfillment of the Agency's mission.

Appendix I – Proposed Operations Expense Budget

BOC	Operating Expense	FY 2025	FY 2026	FY 2027
11.1	Full Time Permanent	8,950,000	9,150,000	9,150,000
11.3	Other Than Full Time Permanent	1,140,077	1,000,000	1,000,000
11.5	Other Personnel Compensation	307,372	300,000	300,000
12.1	Civilian Personnel Benefits	3,299,906	3,400,000	3,350,000
Total Salaries and Benefits		\$13,697,355	\$13,850,000	\$13,800,000
21.0	Travel & Transportation	325,171	900,000	900,000
22.0	Transportation of Things (Co-Location Expenses)	0	5,000	5,000
23.1	Rental Payments to GSA	1,929,512	2,022,000	2,100,000
23.3	Communications & Utilities	55,811	60,000	60,000
24.0	Printing & Reproduction	0	10,000	5,000
25.1	Advisory & Assistance Services	3,689,076	4,600,000	4,600,000
25.2	Other Services (Non-Federal)	179,706	185,000	170,000
25.3	Other Services (Federal IAAs)	1,157,023	2,175,000	2,100,000
25.4	Operation & Maintenance of Facilities	40,382	45,000	35,000
25.7	Operation & Maintenance of Equipment	76,735	85,000	70,000
26.0	Supplies & Materials	75,159	85,000	65,000
31.0	Furniture & Equipment	892,945	1,500,000	540,000
Total Operating Expenses (OE)		\$22,118,875	\$25,522,000	\$24,450,000

Appendix II - USTDA's Toolkit

Leveraging the innovation of U.S. industry, USTDA offers a complete toolkit of project preparation and partnership-building activities to help mobilize trusted U.S. technology, goods, and services to priority U.S. national security infrastructure projects in emerging markets. Over the past three decades, the flexibility and enduring relevance of the Agency's tools have allowed USTDA to address some of the most pressing economic and geopolitical issues of the day.

USTDA is among the world's premier infrastructure project preparation facilities because of the successful application of its tools, generating results that enhance American competitiveness, support U.S. jobs and advance U.S. national security.

Feasibility Studies

USTDA feasibility studies define U.S. technology and design options for infrastructure projects and provide the analysis that is needed for their financing and implementation. Carried out by U.S. companies, USTDA's studies create a pathway to deploy trusted American solutions to these projects.

Technical Assistance

USTDA technical assistance creates new pathways for exporting trusted U.S. solutions by supporting enabling environments for high-quality infrastructure development, increasing U.S. competitiveness in key markets.

Pilot Projects

USTDA pilot projects facilitate U.S. exports by demonstrating the effectiveness of American technology in emerging markets. By providing analysis and empirical data, pilot projects catalyze strategic infrastructure and identify ways to scale and replicate success.

Transaction Incentives

U.S. firms often face subsidized, state-sponsored foreign competition in strategically important international infrastructure deals. USTDA helps level this playing field for U.S. firms by offering emerging market decision-makers specialized training programs if they select trusted U.S. solutions. This unique tool in the U.S. government's advocacy arsenal gives U.S. exporters greater odds of success during the most critical phase of the overseas decision-making process, especially when they face fierce competition from China.

Reverse Trade Missions

USTDA hosts reverse trade missions that bring overseas decision-makers to the United States to observe the best of American infrastructure design, manufacturing and operations. These visits link U.S. industry to export opportunities that advance shared strategic infrastructure priorities in partner countries.

Industry Events

USTDA convenes industry leaders from the United States and emerging markets to build partnerships that promote trusted U.S. technology and financing solutions for emerging market infrastructure priorities.