

# Research updates, policy strategy, and workplan for 2026

---

GEZ Board Meeting - 2/13/26

UC Berkeley Labor Center (UCB LC)

# Goals and context for high road sector strategy for clean energy manufacturing (CEM)

## Context

- A. Ongoing oil and gas **refinery transitions**
- B. **Clean energy industry still growing**, despite federal shifts
- C. National focus on **reshoring supply chains** and production capacity

## Goals

1. **Attract projects** that create **good jobs** and **local revenue**
2. Ensure **community benefits** and **environmental sustainability**
3. **Leverage** the region's unique **industrial assets and workforce**
4. **Grow industry cluster** to capture multiplier on jobs and activity

# Plan for today: strategy overview and plan for 2026

1

## Technology Research

1. Environmental research: overview and purpose
2. Workforce research: overview and purpose
3. Employer Attraction takeaways from UCB Research

2

## Policy Research

1. Refresh: relevant policy areas
2. CEM focused strategy for GEZ
3. Recommendations: design and audience

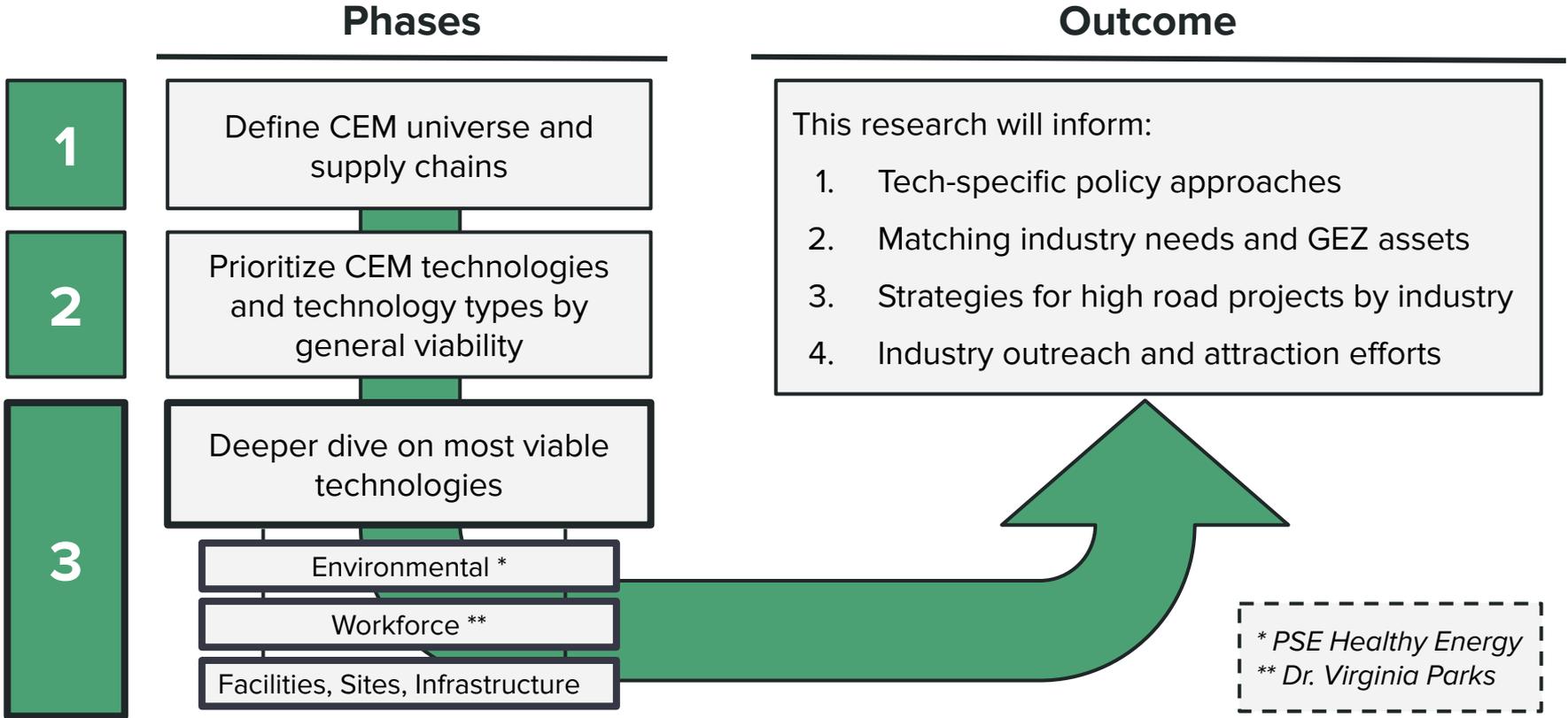
3

## Process

1. How to engage in research
2. Review plan for '26

# Technology Research

# Refresh: technology research process and outcomes



# Refresh: Technology research is focused on the most viable technology areas and subcategories

## Batteries

- Thermal
- Solid State
- Cathode Material
- Module Assembly
- Flow

## Electric Grid Components

- Transformers (high voltage, distribution)
- Switchgears (high and medium)
- Electronic Manufacturing Services
- Power electronic modules

## Zero Emission Vehicles

- Light and Medium Duty vehicles
- Drones/EVTOL
- Electric Ferries/ships

## EV Chargers

- DC Fast charger and/or Level 2 chargers

## Heat Pump/Water Heaters

- Commercial Heat Pump Water Heater

## Electrolyzers

- Catalyst, stack and module assembly

## Offshore wind

- Platforms
- Subsea cables

**Note on Scale:** Primarily looking at low to mid scale production facilities.

# Goals of the Environmental and Workforce Research

**1**

**Understand potential for high road projects by technology type**

**2**

**Educate stakeholders across community**

**3**

**Inform policy approaches**

# Environmental Research

## Researcher

**PSE Healthy Energy**

## Scope

- 1) Detailed review to identify environmental and public health risks, hazards associated with CEM technologies & subcategories based on published research, regulatory filings and public reports.
- 2) Includes high-level analysis of existing CEM firms in Contra Costa and Solano Counties and stakeholder engagement.
- 3) Final report and recommendations for strategies to avoid or minimize environmental and public health risk

## Engagement

- Environmental and Environmental Justice Stakeholder Briefing on PSE's research was completed on 12/2. A follow-up session will be held in the spring with draft study results
- Presentation to GEZ Governing Board in July, and written report

# Workforce Research

## Researcher

**Dr. Virginia Parks, UC Irvine**

## Scope

- 1) Analyze job data for existing CEM firms, including: quantity, occupations, skills, training pathways, baseline wages, and quality.
- 2) Review available literature and data on jobs associated with manufacturing most viable clean energy technologies.
- 3) Develop protocols and conduct interviews with informants and stakeholders in the region to share information and help shape analysis and recommendations.

## Engagement

- Interviews of employers and workforce development organizations to map needs, strengths, and gaps in current GEZ workforce ecosystem.
- Present findings to GEZ Board at May meeting, and written report.

# Employer Attraction takeaways from UCB Research

**KEY TAKEAWAY:** The GEZ is best positioned to attract manufacturing projects whose products will compete based on **quality** and **innovation**.

## UCB Research:

- 25+ interviews with employers
- 10+ interviews with industry experts
- Desk research

1

**Proximity to engineering/R&D** important for early stage lines

2

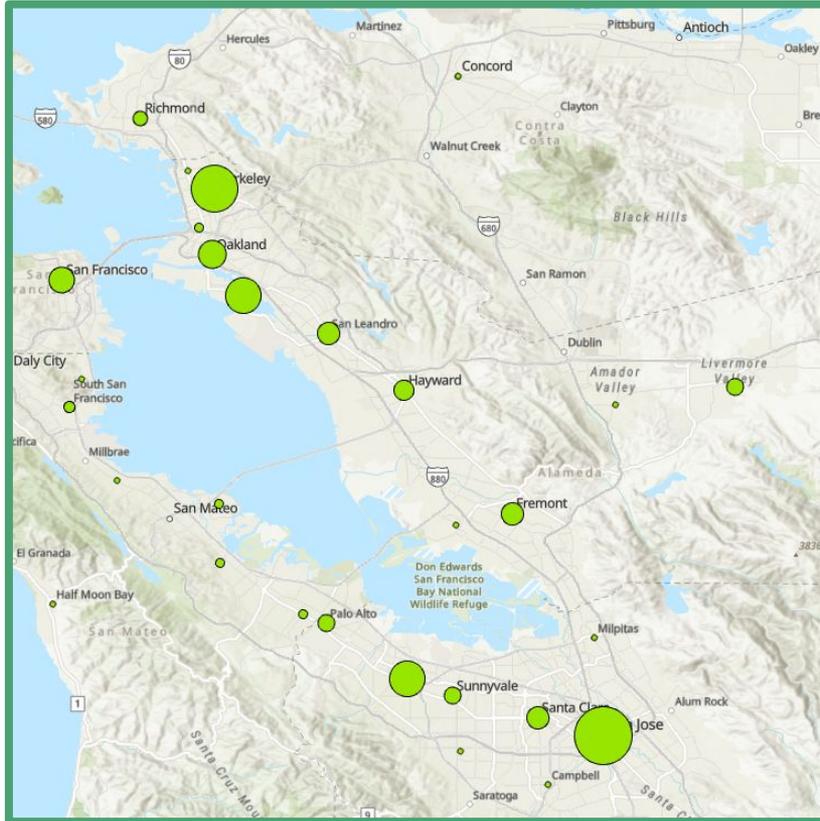
**Highly skilled workforce** is highly valued by employers

3

**High OpEx costs** are difficult for large, low margin production

1

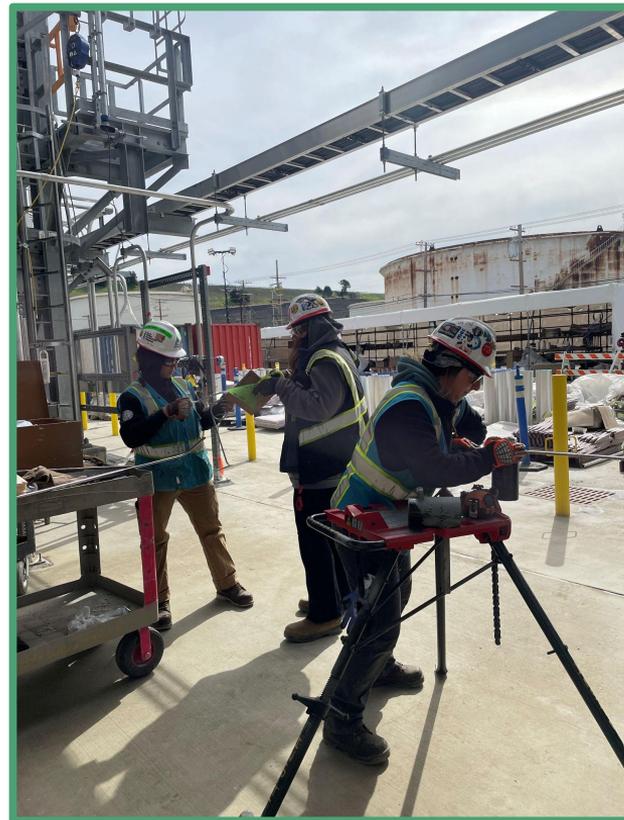
# Proximity to engineering/R&D important for early stage lines



**Sources:** Cleantech headquarters, UCB Labor Center Analysis, 2025; CCST Report [Link](#)

2

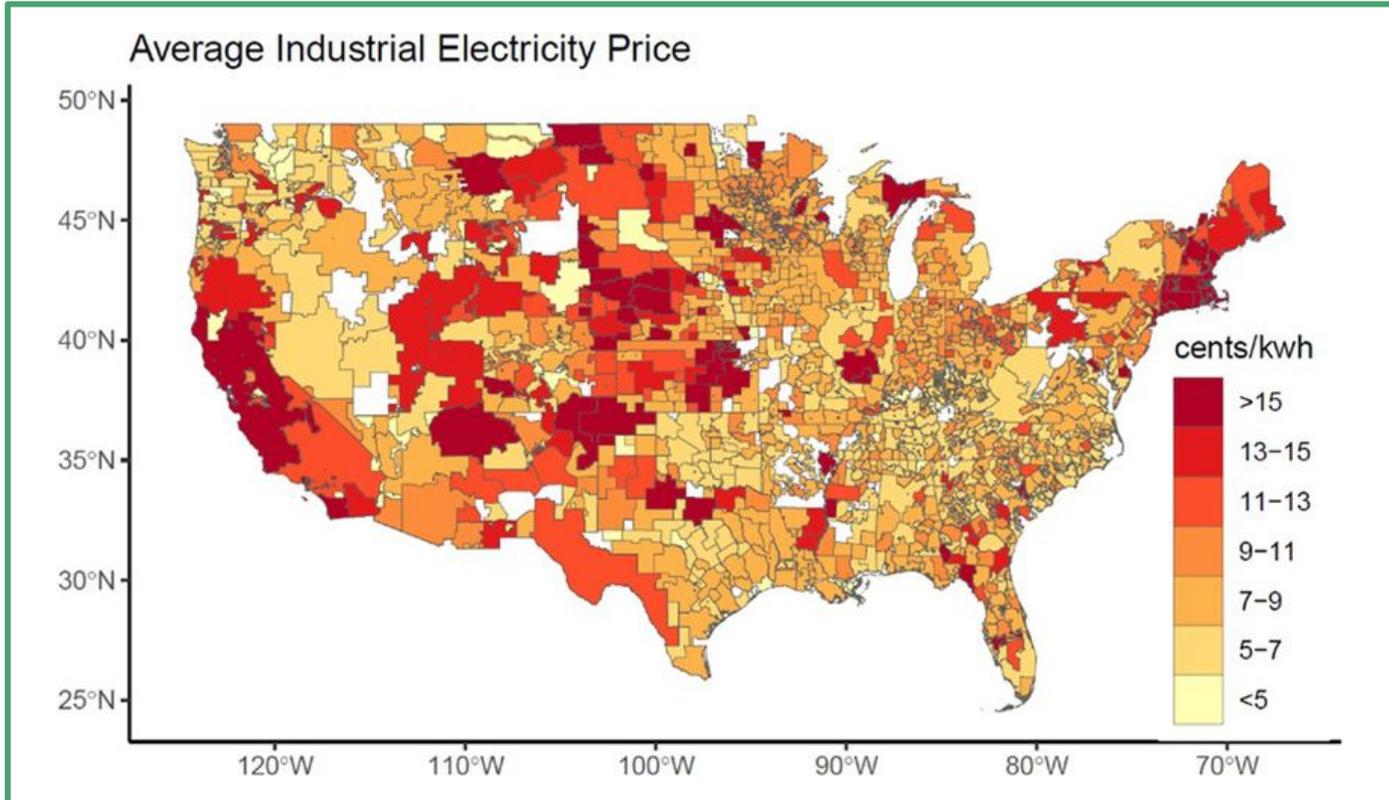
## Highly skilled workforce is a key attraction tool



Source:  
Marathon [Link](#)

# 3

## High OpEx costs are difficult for large, low margin production



Source:  
Frontiers in  
Energy  
Research, [Link](#)

# **Policy Research & Recommendations**

# Refresh: overview of relevant policy areas

## Employer Attraction

Industrial Lands and  
Facilities

Infrastructure

Funding and Capital  
Access

Training and Workforce  
Development

Procurement/  
Deployment/ Support

## Governance

Permitting

Coordination/Strategy

Zoning

## Standards

Job Quality and Access

Environmental

Community Benefits

# CEM focused strategy for the GEZ

1

**Create and utilize demand** (procure and deploy) for locally produced products through GEZ and State of CA climate policy.

2

**Leverage local advantages** of workforce, innovation, and access to capital to support local manufacturers and attract new projects.

3

**Prepare and develop sites** to expedite deployment of safe and sustainable projects with smart zoning and advanced facilities.

3

**Build pathway and ecosystem** for companies competing on quality and innovation to scale up production at GEZ sites.

# Audiences/implementers for policy recommendations

## State and Regional

- Implementers could be CA legislature, CA agencies, or regional governments
- GEZ board could vote to endorse and then advocate for implementation

## Local Municipalities

- Best practices/models for municipalities to pursue
- Diversity of GEZ municipalities requires unique design and implementation
- Leadership of Governing Board members will be critical
- Consistency across cities can enhance overall impact

## GEZ

- Recommendations on what the role and powers of the GEZ or a similar governance entity should be to help achieve the goals of the GEZ
- Achieving those recommendations would likely require advocacy for additional resources and authority.

**\*\*\*Recommendations may be policy/regulatory changes or programmatic approaches\*\*\***

**Process: Plan for 2026**

# Governing Board engagement with recommendations



**Before discussions:** Invite relevant team members.

**During discussions:** Engage and provide feedback

**Between discussions and report:** Schedule 1 on 1s with Labor Center, explore implications or path forward within your organization, engage with external stakeholders.

**During interim report presentation:** Engage and provide feedback on report and recommendations.

**After interim report presentation:** Refine recommendations, pursue implementation strategies.

# Work plan and schedule of meetings in '26

## Technology

## Policy

**3/20**

Facility, Site and Infrastructure Needs of Manufacturers

Electric Power

Infrastructure

Procurement

Facility Development

Financing

Other Tech

**5/15**

Workforce Analysis

Workforce Development

Job Quality Standards

Community Benefits and Negotiated Agreements

**7/17**

Environmental Risk and Strategies Assessment

Permitting & Zoning

Environmental Standards

**9/18**

Interim Report and Recommendations