

Putting Trade Union Power
into European Batteries



Building strong unions for strong collective bargaining in strong industries

Putting Trade Union Power into European Batteries

Every workplace
with a union.
Every worker
in the union.



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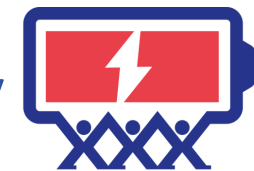
Putting Trade Union Power into European Batteries - Scope

Why this project?

- Battery = fast growing industry in Europe
- Hundreds of thousands of jobs → many in CEE
- Risks: unsafe workplaces, precarious jobs, weak unions

Our objectives

- Build union power & representation
- Win company & sectoral CBAs
- Use OSH as an organising tool
- Build a network of organisers
- Link with global battery supply chain organising campaign



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Project Pillar 1

Lead: BTUP Unit

Concrete organising activities: Targeting battery companies in Europe

Target Countries: Slovakia, Serbia, Hungary, Poland

Focus: Organisational Health and Safety (OSH) issues in battery industry assembly



Project Pillar 2:

Lead: IP Unit at industriAll Europe

Concrete IP activities:

Implementation of the OSH Charter for Battery Industry workers, Due Diligence in the battery supply chain

Target Countries: All iAE members/EU level;

Focus: Achieve better institutional/legal framework for OSH to protect battery workers



Project Pillar 3:

Lead: IAE & IAG

Concrete activities:

Transnational organising of workers in battery supply chain (from mining/refining to assembly).

Knowledge transfer/exchange

Focus: IAG: Indonesia - entire supply chain; Congo – Mining

IAE: Organising battery assembly in CEE



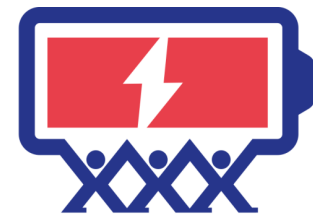
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Putting Trade Union Power into European Batteries - Expected outcomes

- Higher unionisation rate
- More collective agreements & better working conditions in Battery Supply Chain
- Network of Organisers is growing
- (Ad-Hoc) Battery Task-Force established at industriAll Europe
- OSH Charter implemented
- Good Jobs in our industries



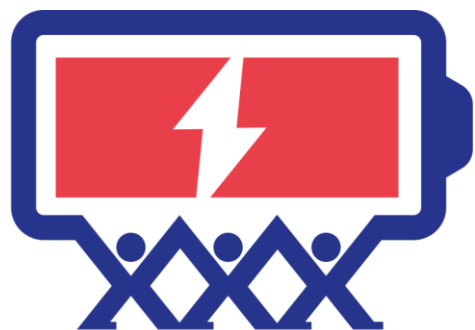
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Focus Region



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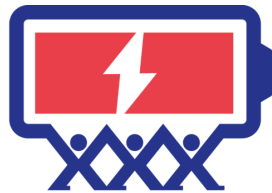


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Presentation title

Mapping European Battery Industry – Overall Industry Trends

- Europe's battery industry is expanding but many projects are delayed, downsized or cancelled due to weak EV demand and high costs.
- Central and Eastern Europe (Hungary, Poland, Slovakia, Serbia) are becoming hubs thanks to subsidies and low taxes, but jobs are often precarious.
- China and South Korea dominate technology and investments (CATL, BYD, SK On, Samsung, LG).
- European players face financial struggles; Northvolt collapsed into bankruptcy, with U.S. startup Lyten acquiring assets.
- Workforce needs could reach 800,000 by 2030, but union density is extremely low.
- OSH risks (chemical exposure, fatigue, poor training for migrant workers) remain the main entry point for organising.



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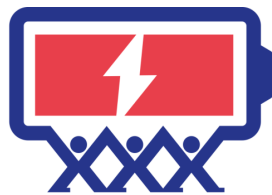
Mapping European Battery Industry - By Country

- **Germany:** Tesla, CATL, VW – growth but precarious jobs; IG Metall pushes for CBAs/works councils.
- **France:** ACC active but expansion paused; Verkor & ProLogium plan sites; unions strong via social dialogue.
- **Spain:** VW/PowerCo Sagunto & Stellantis-CATL Zaragoza – big projects, unions aim for auto CBAs to cover.
- **Italy:** Seri Teverola running; Italvolt & ACC Termoli stalled – unions warn of delays, weak policy.
- **Sweden/Norway/UK:** Northvolt collapsed (Lyten takeover); Norway mixed (Morrow up, Freyr cancelled); UK: Envision & Tata expanding, unions demand job quality with subsidies.



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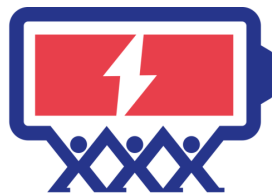
Poland

- **Key sites:** LG Wrocław (7,000 workers, 86 GWh), Mercedes Jawor, BMZ Gliwice, Umicore Nysa, SK Hi-Tech Dąbrowa, Exide Poznań (lead-acid, 450 workers).
- **Investments:** Umicore–PowerCo JV in Nysa started recruitment; BMZ and Mercedes expanding.
- **Northvolt:** Bankruptcy hit planned Gdańsk site; U.S. Lyten acquired Swedish/German assets, with indirect effects on Poland.
- **Employment:** ~8,500–9,000, concentrated in Lower Silesia; reliance on Ukrainian migrant and agency workers.
- **Unions:** OPZZ, Solidarność active but recruitment remains difficult.
- **Concerns:** OSH, job insecurity, ensuring wage parity with auto sector.



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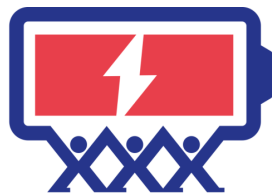
Hungary

- **Major investors:** Samsung, SK On, CATL, EVE Power, Sunwoda; new entry BYD (Szeged EV plant, HQ & R&D in Budapest).
- **Employment:** ~7,000–8,000 in batteries, thousands more in supply chain; heavy reliance on agency and migrant labour.
- **Unions:** VDSz (450 members at SK, 15% density) and VASAS active; campaigns at CATL, Mercedes, BMW.
- **OSH:** Major hazards from chemicals (HF, nickel, HCN, ammonia), poor PPE, unsafe bonus systems. Samsung fined multiple times.
- **Challenge:** Anti-union stance of Korean and some Chinese firms.



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Slovakia

- Investments: InoBat/Gotion Šurany project; supply links to VW, Kia, JLR.
- Unions: OZ KOVO leading battery industry organising, using AI, social media and surveys.
- Issues: Attendance bonuses, poor canteen meals, sick leave abuse, food quality.

Serbia

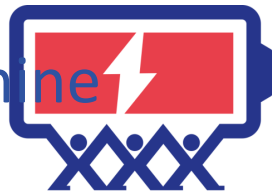
- Industry: ElevenES (local LFP startup), InoBat , Minth, Kyungshin; Chinese JMEV to open EV plant in Sremska Mitrovica.
- Political context: EU–Serbia raw materials partnership; Rio Tinto lithium mine remains controversial.

- Unions: ISS, SSMS, Nezavisnost. Focus on OSH and insecure contracts.



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Using Occupational Health and Safety issues to:

- Organise to build negotiation power of trade unions in an emerging industry
- Develop experience of transnational unionising around concrete issues with the organisers on the ground
- Increase leverage of unions for workers' rights, good industrial jobs and occupational health and safety
- Ensure a say in a new industry, nationally and on European level

By:

- Targeted organising and communication campaigns
- Forcing companies to implement OSH Charter
- Developing a transnational network of organisers/experts for the battery sector



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Main OSH Risks in Battery Production

Toxic Exposure: Contact with lithium, nickel, cobalt → respiratory illness, cancer, fertility issues

• **Solvents & Chemicals:** Benzene, toluene → neurological damage, long-term diseases

• **Explosion & Fire:** Risk from overheating, leaks, or handling lithium-ion cells

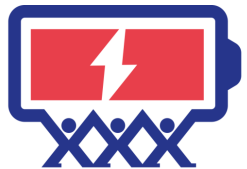
• **Machine Hazards:** Fast lines, poor training, fatigue → high accident risk

• **Zero-Humidity Workspaces:** Cause respiratory and skin issues

• **Poor PPE & Safety Culture:** Especially for migrant/agency workers

• **Underreporting:** Bonus systems and fear of retaliation suppress incident reporting

→ **Strong union presence needed to push for training, PPE, and safe processes**



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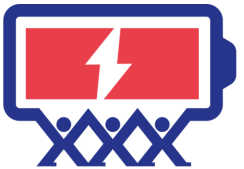


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Main OSH Risks in Battery Recycling

- Chemical Hazards:** Exposure to acids, lithium salts, cobalt dust → poisoning, burns, cancer
- **Electrical Risks:** Shock, arc flash during dismantling
 - **Explosion/Fire:** From punctured or overheated batteries
 - **Dust, Noise, Vibration:** Risk of lung disease, hearing loss, injury
 - **Poor Infrastructure:** Weak ventilation, lack of rest or washing stations
 - **Health Monitoring Gaps:** Long-term effects often undetected
 - **High-Tech vs Safety:** Automation helps but must not replace safety jobs
- **Unions must push for full risk assessment, monitoring, and safe tech**

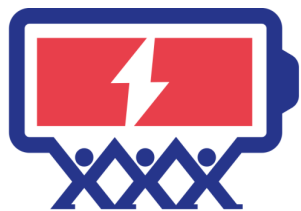


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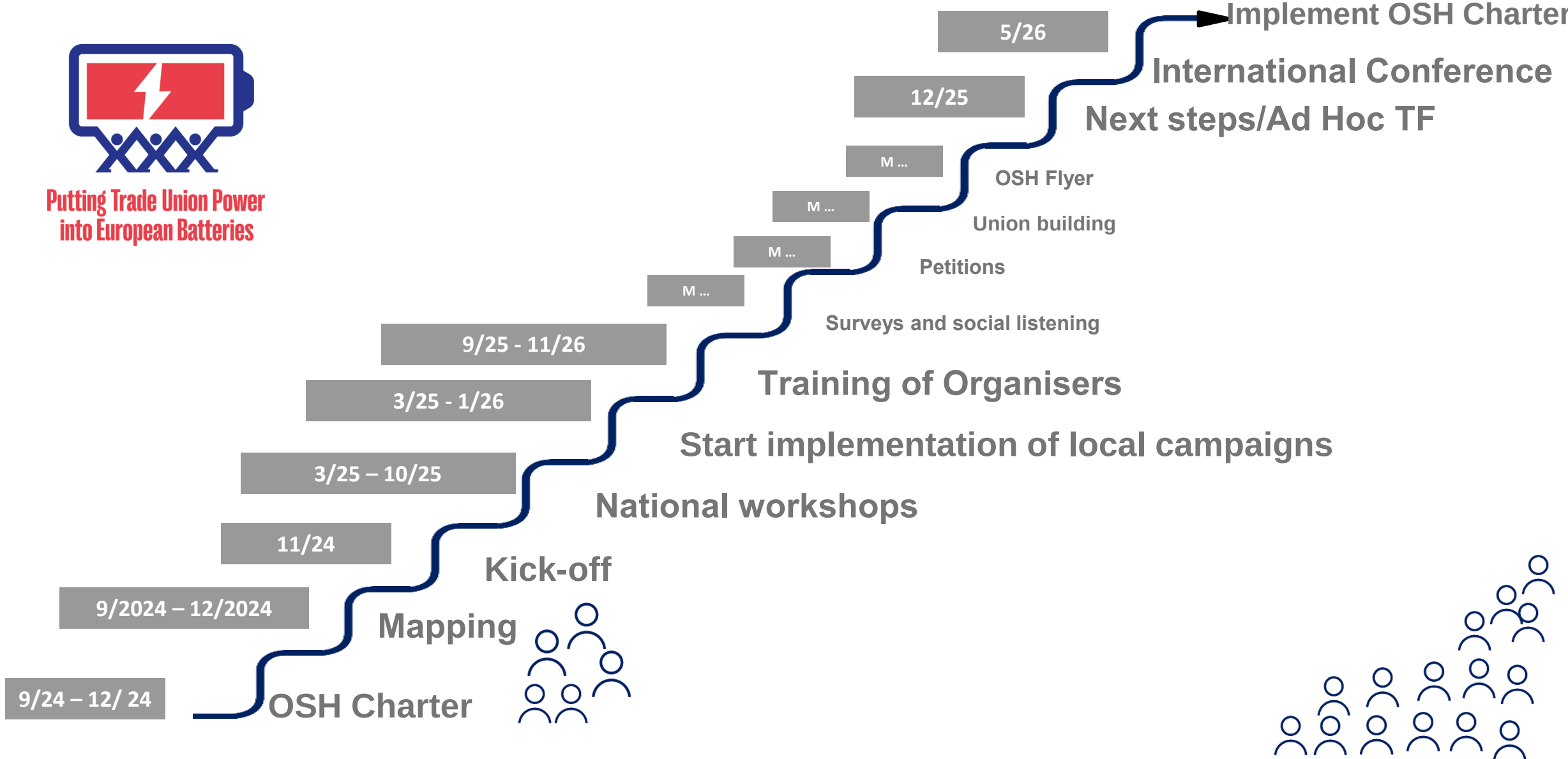


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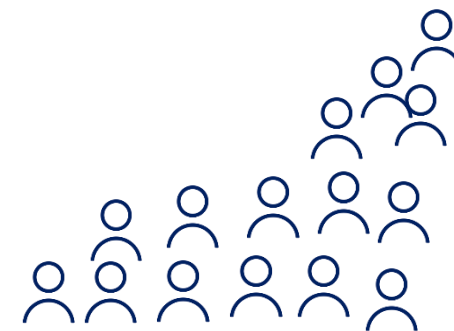
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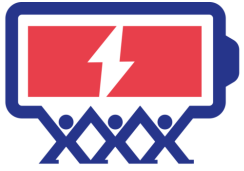


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Collective Recruitment and Forming the Union Narrative





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Poland (Preperation, Feb 2025)

- Purpose: raise awareness → national workshop Oct 2025
- Solidarnosc & OPZZ agreed on cooperation

Slovakia (Apr 2025)

- Focus: mapping full supply chain
- Company campaigns designed: VW, Kia, JLR, Hella
- Used AI & digital tools
- Campaign rollouts planned for late 2025

Poland (Oct 2025)

- Discussed mapping report
- Shared organising experiences
- Developed work plans
- Agreed on Organising network – exchange
- Learned about EDDD, EWC, GA

Serbia (Mar 2025)

- Visit to ElevenEs (local start-up)
- Unions agreed non-competition
- OSH & contracts key issues
- First national organising plan

Hungary (May 2025)

- Shop stewards from SK, Mercedes, BMW, CATL
- Focus: OSH + migrant workers
- Strategies: OSH elections as mobilisation
- Link safety issues to recruitment



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What's next? Local campaigns on union building, organising, recruitment

(From late 2025 onwards – volatile industry, targets may change)

- Serbia: ElevenEs, InoBat
- Slovakia: Kia, VW, JLR, InoBat, Hella
- Hungary: SK, CATL, Mercedes, BMW
- Poland: LG Energy, Mercedes, BMZ, Exide



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