Brussels, 20 February 2026

"Putting Trade Union Power into European Batteries - BatteryTUPower"

Update Mapping Report – Investments and Union Situation in the European battery industry in January 2026

1. Introduction

The second year has started for **"Putting Trade Union Power into European Batteries",** an industriAll Europe project supported by the European Union. It aims to build trade union capacity for organising workers in the growing electric vehicle battery industry, developing well-functioning industrial relations, negotiating collective agreements to secure good working conditions, and to contribute to a sustainable green and Just Transition.

The automotive industry, employing nearly 13 million workers directly and indirectly in Europe, has historically been a stronghold for Europe's industrial trade union movement, with a unionised workforce, progressive collective agreements, and strong health and safety standards. However, the shift to electrification, decarbonisation, digitalisation, and increasing global competition presents both challenges and opportunities for trade unions.

Some years ago, the European Battery Alliance estimated that 800,000 workers would need to be trained, upskilled, or reskilled by 2025 to meet rapidly growing demand. However, relatively high prices of electric vehicles, insufficient charging infrastructure, and market disruptions like tariffs have slowed down the sales of electric vehicles (EV) and led to job losses. Therefore, also battery industry investment plans have been scaled down and postponed.

Most experts are however convinced that the future of the automotive industry will be electric, even though the green transition will take place at a slower pace than it was thought some years ago.

At a project kick-off seminar on 12 November 2024 in Brussels, participating unions agreed to focus in the project on the biggest growth countries; Poland, Hungary, Slovakia and Serbia, while inviting unions in other countries with significant investment plans, such as Germany, France, Spain, Italy, Sweden, Norway and the UK, to participate. Norway decided to withdraw later because of no visible investment plans, while Czechia has participated as there is now news about possible new investment.

The project started in December 2024 with a **mapping** of the existing and planned investments in battery and cell factories, as well as in selected supply chain companies, notably materials. In addition, the mapping included reports from 26 participating unions in 12 countries, focusing on the main investment plans and the union situation and possible preliminary organising plans. The mapping was meant to provide a broader picture of what is happening in different European countries, help unions in identifying potential organising targets and develop cross-border cooperation and networking.

with financial support of the European Union

After the mapping, participating unions embarked on strategic planning and organising action. **Four national workshops** were organised in Serbia, Slovakia, Hungary and Poland in the course of 2025. The Serbia workshop participants also visited the **ElevenEs** battery plant for introduction and relationship building.

Organisers from the four target countries attended a **three-day training** in Budapest in September, focusing on digital organising, social listening, and strategic campaign planning. The **IndustriAll Europe Charter for Health & Safety in Battery Production** provides a useful framework for issue-based organising, as problems with health and safety in battery factories have been reported by almost all participating unions. **Leaflets** based on the Charter were produced and rolled out in the project.

The **project steering committee** has met regularly, evaluating action so far and discussing next steps. The **Ad-Hoc Battery Task Force** involving IndustriALL Global Union has functioned as an ongoing coordination space, bringing in the global supply chain angle, and ensuring the European and global relevance of our work on batteries.

2. Industrial developments in the European battery industry

The focus of this project and related mappings is on the auto industry related batteries built for full electric cars (Battery Electric Vehicles or BEVs) and hybrids (both Plug-in Hybrid Electric Vehicles or PHEVs and Hybrid Electric Vehicles or HEVs). It also looks at selected important supply chain investments, notably on cathode active materials (CAM) and anode active materials (AAM). There is growing interest in bigger-scale energy storage batteries, but they fall outside the scope of this project. The same applies to the technological development in battery production methods and materials, which is interesting as such but not directly related to organising.

The developments in the battery industry will largely depend on whether the electric vehicle market picks up.

According to ACEA, new EU car registrations increased in 2025 by 1.8% compared to the same period last year, while remaining well below pre-pandemic levels. However, electrification advanced, with Germany leading in growth figures. Almost 1.9 million battery-electric cars accounted for 17.4% of the EU market share, an increase from 13.6% in 2024. Hybrids captured 34.5% of the market. The combined market share of petrol and diesel cars fell to 35.5%, down from 45.2% in 2024.

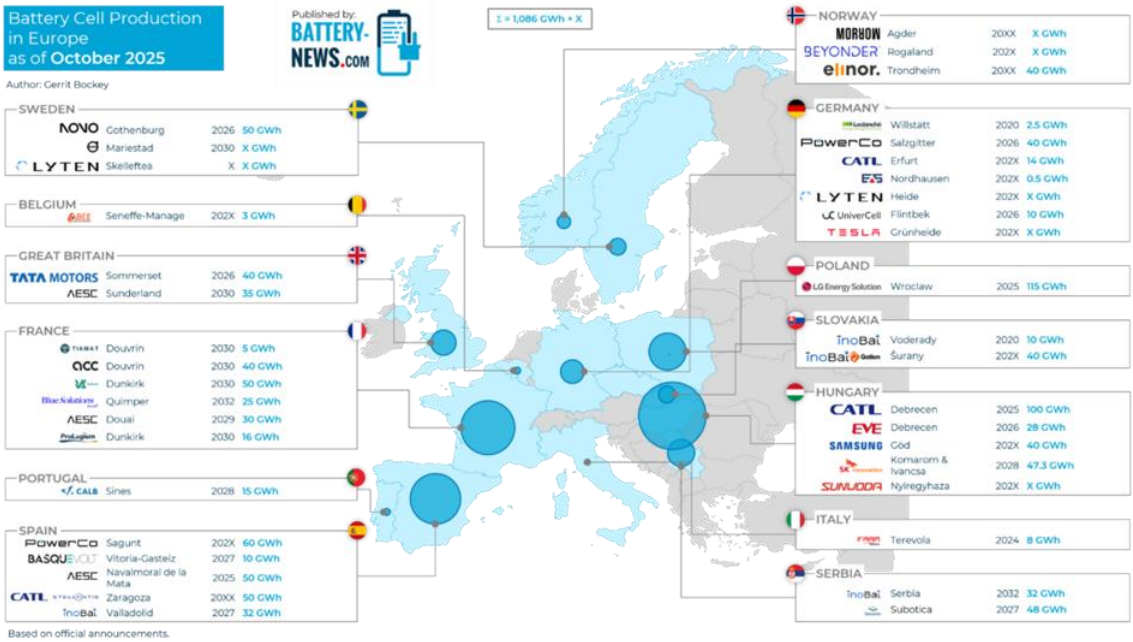
Brueghel has estimated that in September 2025, European battery factories had the capacity of 251 GWh. However, around 80-85% of batteries and cells are still imported to the EU from China. Technology is also mainly Chinese and South Korean**.**

Despite some promising news, developments in the past two years have revealed a massive overestimation of the pace of the rollout of electromobility, as well as an underestimation of technical and other challenges. As a result, major automotive producers have revised their plans, some cancelling previously announced strategic changes, some refocusing on hybrids instead of BEVs, and some even upgrading their combustion engine plans. Uncertainty about European Union policies and regulations has not been helpful for future strategic planning either.

The case of Stellantis is illustrative. In 2020, it announced a joint venture called ACC with TotalEnergies and Mercedes-Benz, aiming to build three battery plants in France, Germany and Italy. The construction project in France went ahead and production started in 2023. However, in February 2026, Stellantis announced that the projects in Germany and Italy were cancelled, which meant a €2.1billion write-down

and thousands of uncreated jobs. In addition to poor market development, technical and scale-up problems at the French factory and a technological change may also have had an impact on the decision.

A recent update from Battery News lists some of the announced investments in battery selection. The list is not exhaustive; more comprehensive information on major battery projects can be found in the reports from affiliated unions in chapter 3 of this report.



Source: Battery News, published in January 2026.

The European Union's Automotive Package in December 2025 includes a **"Battery Booster"** programme. €1.5 billion will be used to support European battery cell producers through interest-free loans. However, as the field of European battery cell manufacturers has shrunk considerably, there are at the moment only three eligible companies: Volkswagen subsidiary PowerCo, and the French firms ACC and Verkor. Additional targeted policy measures worth €300 million will support investments, create a European battery value chain and foster innovation and coordination across Member States.

As more and more EVs are being retired, **disassembly and recycling** of battery-electric vehicles is becoming a high-growth industry. Consultancy McKinsey & Co projects that global revenues across the battery recycling chain are set to grow to roughly $70 billion a year by 2040, up from about $2.5 billion last year.

3. Reports from industriAll Europe affiliates: comments on investments and trade union situation

In January 2026, industriAll Europe sent a questionnaire to its affiliates in 12 countries with already functioning battery factories and planned investments. Unions were asked to respond to the following questions:

1. What are the **most important investment decisions** in the battery industry in your country so far? Any new announcements, changed plans, postponements or cancellations because of the market situation?

2. Please list the **battery factories that are already in operation**. How many **workers** are there and how many **members** does your union have? What **collective agreements** are there? What **concerns and challenges** are there for the workers and your union?

3. What is the **organising plan of your union** so far for the battery industry? Are you **cooperating** with other unions, NGOs or others?

4. Please attach any **documents**, reports and web links (in any language) that you consider useful for the mapping.

Despite the short notice, we received replies from the following unions:

- Poland: NSZZ Solidarność Metalowców
- Hungary: VDSz
- Slovakia: OZ KOVO
- Serbia: lead organiser Dalibor Antanasijević on behalf of Serbian affiliates SSMS, Nezavisnost Metal and ISS
- Czech Republic: OS KOVO
- Germany: IG Metall
- France: FGMM-CFDT
- Spain: CCOO Industria, USO Industria
- Belgium: MWB-FGTB, ACV-CSC METEA
- Sweden: IF Metall

In the following, we summarise the update reports from the unions on industrial developments, union organising action, labour-management relations, and problems reported by workers. The reports are not exhaustive but reflect those investment plans that are especially interesting to unions for organising and collective bargaining action.

Poland

The metalworkers' union **NSZZ Solidarność Metalowców** reports that **MAN Truck & Bus** is allocating PLN 3.2 billion to the construction of a truck battery production plant in Niepołomice near Kraków. It is expected to employ 600 people, and its production capacity will exceed 200,000 batteries annually.

ElevenEs is planning to build a battery cell gigafactory worth nearly €600 million. The company is seriously considering Poland as a preferred location for its future investment. Construction of the production facility is scheduled to begin by the end of 2027, and it is expected to employ 700 engineers.

The European Commission, through its Innovation Fund, has co-financed the 46inEU Project. The project involves the launch of a line producing new-generation cylindrical 46-series cells, primarily for electric cars. The project will be implemented by **LG Energy Solutions**.

Expansion of the **Mercedes Benz** manufacturing factory involves the construction of a warehouse and production hall.

Investment by **Ascend Elements** is now largely confirmed. The cathode active materials factory will be built in the Opole Wrzoski Special Economic Zone after the American company purchased the land for the investment.

The union also draws our attention to an interesting article on the geopolitics of batteries.

On organising workers, the Solidarność metalworkers collaborate with their local structures, regional boards (local structures), union development departments, and the National Commission. The union already had some members at **SK Hi-Tech Battery Materials** and **Umicore,** while planning to activate unionisation efforts.

A breakthrough came in June 2025 when a new local union organisation was formed at **LG Energy Solutions.** In the beginning, the employer did not take the union seriously, but a union election was held in November at the entrance of the company. Many workers are still afraid, but the local union now has an office and is preparing to put out their brochures. Some workers have been laid off while new workers have been hired, mostly Ukrainian agency workers. The union has met a lawyer to prepare a court case, and it is planning to meet with the HR director. It has also asked for help from regional authorities as bonuses were not paid to the workers.

Hungary

In the mapping a year ago, the chemical workers' union **VDSz** reported that the Hungarian government in 2022 approved a battery strategy for up to 2030. Its goal was to make Hungary the third largest player in the battery sector. In recent years, it has provided €3.5 billion in support for industrial investments. The investors are mostly from China and South Korea.

The largest companies are **Samsung SDI** (South Korea, 2,900 workers), **SK** (South Korea, 2,700 workers, **CATL** (China, 700 workers), **EvePower** (China, 150 workers), and **Sunvoda** (China, 35 workers).

However, according to VDSz, there are no new investments other than those previously announced. Production in the Samsung and SK factories has fallen by at least 35%, reflecting the complicated situation in the automotive industry, overcapacity, competition and technological shifts.

In November, the environmental permit of **Samsung's** factory in Göd was revoked, which recently received around € 350 million in State aid. However, the highest judicial authority Kúria overturned the decision and revalidated the permit in February 2026.

A new scandal emerged in early 2026, when an independent investigation brought to light systemic occupational safety and health failures at the Samsung plant. Internal and official documents show that for years, workers at the factory were exposed to toxic chemicals and carcinogenic substances at levels vastly above the legal limits, with some exposures measured at hundreds of times over the permissible thresholds. Ventilation systems were allegedly ineffective, and hazardous dust and solvents were released without adequate filtration or controls.

This report was published at the beginning of February and gained publicity. Labour inspection records going back several years reveal repeated instances where workers were exposed to dangerous levels of metals and volatile organic compounds. Yet the response from authorities has been weak, mostly just minor fines with no effective corrective action. The VDSz and VASAS unions, together with their

confederation, have opened an anonymous worker helpline staffed by labour lawyers and occupational safety experts. In an open letter, they demand that Samsung's management ensure worker protection immediately. VDSZ announced that a local union was now formed and they had a first discussion with the management.

The CATL facility has not started as impressively as planned. The Sunvoda project to build a battery factory in Nyíregyháza, north of Debrecen, has not been completed, even though the European Commission in August 2025 approved funding worth €260 million from the Hungarian government. Employment is uncertain - there are layoffs, and recruitment of new workers has stopped.

Source: Presentation by Prof. Stefanie Hürtgen to iAE's project steering committee, December 2025

VDSz is continuing its organising campaign in the battery industry supply chain, with the help of four full-time staff and funds from the EU's Economic Development and Innovation Operational Programme for Hungary (GINOP Plus). There are more than 400 union members at SK, 70 at CATL and some in a newly-formed local union at Samsung. However, organising is complicated by high turnover which makes workers afraid.

The union lists as the biggest problems the industrial uncertainty crisis, health and safety, labour protection, low wages, and foreign workers from China, Ukraine and the Philippines. It appreciates the support from industriAll Europe and Global. Also, cooperation with the Hungarian Battery Association is working rather well, especially in the area of health and safety.

Slovakia

The metalworkers' union **OZ KOVO** reports that over the past year, no new investments in battery manufacturing have been announced.

The most significant player in this segment remains **Gotion InoBat Batteries (GIB)**, a Slovak-Chinese joint venture focused on battery manufacturing. Construction of a battery cell production plant in Šurany (Nitra region) was officially launched in October 2025. Pilot production is planned to start in September 2026, reaching full scale in 2027. The total investment commitment by GIB is around €1.2 billion. The first phase of the project is expected to create 1,300 jobs, potentially reaching 3,500 workers once production expands.

Within the framework of its organising strategy, OZ KOVO currently focuses on other companies within the broader battery, automotive and electromobility value chain, where production is already ongoing or imminent, and where there is a higher immediate potential for trade union organising, collective bargaining and social dialogue.

At the same time, OZ KOVO continues to closely monitor the development of the Gotion InoBat project, recognising its long-term strategic importance for industrial employment, skills development and working conditions in Slovakia. From a trade union perspective, future engagement will be essential to ensure that the creation of new industrial capacities is accompanied by decent work, high occupational health and safety standards, fair wages, workforce participation and effective collective bargaining, in line with European principles of a Just Transition and sustainable industrial development.

Porsche Smart Battery Shop in Horná Streda is operation and focused on the serial production of lithium-ion battery modules for electric vehicles. The company does not produce battery cells themselves; it performs downstream assembly of modules from supplied cells.

At present, OZ KOVO does not have union representation at Porsche Smart Battery Shop. However, OZ KOVO is represented at another Porsche facility in Dubnica nad Váhom, where employees are unionised and benefit from better working conditions and higher remuneration compared with those at the Horná Streda facility. Therefore, the OZ KOVO project team, together with the Dubnica local union chair, carried out a leafleting action in November 2025 at Porsche Smart Battery Shop, during which many workers expressed interest in union membership and collective bargaining at the Horná Streda site.

The two other target companies for OZ KOVO are **Mobis** and **Volvo**. Mobis launched production in January 2026 at a new facility in Nováky with around 270 workers. The plant focuses on the manufacture of electrification components and systems for vehicles. These care key elements for electric and hybrid vehicles link the facility directly to the battery and EV value chain.

OZ KOVO has engaged the local union chair of another already unionised Mobis plant in Gbelany in organising work. The chair visits the new Nováky facility on a weekly basis. This initiative aims to build union presence from the start of production, support collective bargaining, and ensure proper employee representation in the rapidly growing electrification and battery-related production environment at Nováky.

Volvo Cars in Košice is expanding vehicle production and hiring new workers, potentially reaching 1,000 later this year and 3,000 in the long term. OZ KOVO already has established a local union, and plans organising action once the number of production employees increases significantly.

Serbia

Potential national partners in the project include the metalworkers' union SSMS/CATUS, GS Metal Nezavisnost and Industrijski Sindikat Srbije ISS. Dalibor Antanasijević will work as the lead organiser supporting the participating unions. Labour NGO Workers' Voice is also providing useful assistance, including for this mapping report.

Serbian **ElevenEs** began building a production plant in Subotica but later announced plans to expand in Poland. They started with lithium-iron batteries, but the technology is now changing. The Nezavisnost Metal and SSMS trade unions are trying to enter the factory. The Serbia national workshop participants also visited the ElevenEs battery plant for introduction and relationship building. The ISS union is also joining actions in good cooperation. The unions recognise a common goal, and fears of competition between them are diminishing.

The next important target is the Chinese **Minth Group,** a supply chain company. A factory with an €870 million investment and 220 workers is planned to be completed by the end of 2026.

Slovak battery maker **InoBat** had plans to build a factory, but there have been no updates in the past 1.5 years. The initial budget was €2.4 billion, of which €400 million would be government funding.

Czech Republic

OS KOVO reports that the country does not yet have a standalone "gigafactory" for battery cell production in full industrial operation. However, **Toyota Motor Europe** has announced a significant investment to expand its existing plant in Kolín. This expansion will add production lines for a new battery electric vehicle and associated battery production/assembly facilities.

Samsung has postponed the construction of a new battery gigafactory in Dolní Lutyně in the Karviná region, which was supposed to start in 2028. According to the government, this decision was due to the worsening situation in the electric vehicle market.

OS KOVO is following the developments closely. The union's organising plan for the battery industry is not yet a separate, high-profile national programme solely focused on batteries. Rather, it is integrated into broader capacity-building efforts aimed at adapting union organising to new industries and supply chains, with specific focus on early engagement in emerging battery workplaces and cross-border coordination through EU networks.

Germany

IG Metall reports several developments in the past year which reflect the challenging operating environment.

Northvolt is bankrupt and will therefore no longer be building a factory. The US company Lyten is set to take over, but this is currently still dragging on. Even if that works out, it is not clear what will happen with the planned location.

Porsche stopped battery development and production with the start-up **Cellforce** last year. IG Metall has members at Cellforce and, after the announcement of the closure, they decided to establish a works council. The employees and IG Metall demand a future perspective for the workforce.

ACC (Automotive Cells Company, owned by Stellantis, Mercedes-Benz and Saft, a subsidiary of TotalEnergies), halted construction of a gigafactory in Karlsruhe. The reason is said to be declining demand for electric cars. ACC also stopped a project in Temoli, Italy. ACC's only remaining gigafactory is in Dourvin, France, which produces for Stellantis and later this year perhaps also for Mercedes.

VW is the first automaker in Europe to develop and produce its own battery cells on a large scale through its subsidiary **PowerCo** in Salzgitter. Production started at the end of 2025 and is expected to expand. There are IG Metall members in the plant, and they are covered by a regional collective agreement for the metal and electrical industry.

At Chinese **CATL**, there are around 1,700 employees in Erfurt. IG Metall has members there, and in 2024 a works council was elected in which IG Metall has most of the seats. There is still no collective agreement.

For **Tesla**, IG Metall says that they will have to wait and see. Tesla plans to start battery cell production in Grünheide in 2027, but at the existing electric car factory (Tesla's only one in Europe) there is a dispute between the union and the management which has refused to sign a collective agreement. In the upcoming works council election in March, IG Metall wants to increase its 40% share against a management-aligned candidate list. The number of workers at the car factory, employing more than 10,000 workers, has gone down in the past year, but the management denies rumours about further cuts.

At **Akasol**, maker of battery systems for electric commercial vehicles and part of American BorgWarner, in Darmstadt, major lay-offs of over 40% of 800 workers were announced some months ago "to remain competitive in the current environment", as the company explained.

France

The metalworkers' union **FGMM-CFDT** reports that there are several battery factories in operation or under construction:

- **ACC** (joint venture of Stellantis, Mercedes/Daimler and Saft/TotalEnergies) in Douvrin in northern France since 2023 and Bruges near Bordeaux. 13 GWh and 600 workers, target 2030 is 40 GWh and 2,000 workers. Supplies Stellantis, and Mercedes also planned.
- **Envision AESC** (China-Japan) in Douai in northern France. 9 GWh and 650 increasing to1,200 employees at start of production in 2025, target 30 GWh and 2,500-3,000 workers by 2030. Supplies Renault.
- **Verkor** (France) in Dunkerque in northern France. Factory inaugurated in December 2025, production to increase from 8 to 16 GWh with 1,200 employees. Supplies Renault and others.
- **Prologium** (Taiwan) in Dunkerque. Construction started in February 2026.

FGMM-CFDT also mentions companies in battery recycling and materials, many of which have construction plans for 2026-2029.

FGMM-CFDT has members at the plants of AESC, ACC and Verkor. The workers are covered by the sectoral metal industry collective agreement. There are also other unions present at the factories, which is a rather normal situation in France.

The main concerns and challenges listed by FGMM-CFDT are the following:

- Mastering manufacturing processes, which are difficult to develop.
- Many foreign workers are present, often representing more than 40 different nationalities. How can intercultural communication be managed?
- Foreign workers with skills come from China, Japan, and Korea. How can these skills eventually be developed locally? This is a training challenge.
- More generally, skills development, both mechanical and chemical, is crucial.
- Recruitment problems due to a shortage of maintenance technicians and the automotive industry's lack of attractiveness.

Spain

CCOO Industria and **USO Industria** list five major battery industry investment projects in their replies to the questionnaire.

- **Stellantis - CATL** in Zaragoza, Aragón: this 50-50 joint venture has announced a €4.1 billion investment to construct a gigafactory based on LFP technology with a target capacity of 50 GWh and 3,000 direct jobs, depending on the development of the electric vehicle and battery market in Europe. Construction is underway and expected to be completed by the end of 2026.

- **VW Group** / **PowerCo** in Sagunto, Valencia: production is expected to start in September 2026 with 40 GWh initial capacity and employment rising over time to 3,000 direct jobs. Estimated €4.5 billion investment, as part of VW-SEAT €10 billion "Future Fast: Forward" electrification programme.

- **Envision AESC** (China-Japan) in Navalmoral de la Mata, Extremadura: €1 billion investment, target capacity 30 GWh and up to 3,000 workers. However, the project is seriously late and its fate is unclear. Production was supposed to start in 2025. but construction has not even started.

- **Inobat** (Slovakia) in Valladolid, Castilla y León: announced postponement until 2026 because of market uncertainties. The initial plan talked about €700-800 million investment, 8 GWh capacity and 750 direct jobs.

- **BasqueVolt** in the Basque Country: still looking for investors to develop a pilot project, focusing first on research and development. So far only 85 workers.

A major impetus and support for the first four projects has been large-scale financial support from the PERTE programme (Proyectos Estratégicos para la Recuperación y Transformación Económica) which is funded as part of the Next Generation EU mechanism.

CCOO Industria says that it is crucial to defend the industry as a strategic sector, link public aid to stable quality employment, guarantee training and a Just Transition for the workforce, demand a coherent European industrial policy to combat unfair competition, and strengthen the entire value chain from raw materials to recycling and components. Spain has the opportunity to consolidate its position as a European battery hub, but the priority should not be merely announcing projects; rather, it must be ensuring their full development and generating sustainable industrial employment rooted in the country.

As the battery factories are still under construction, there is no trade union presence yet. Both CCOO Industria and USO Industria are following the developments closely, getting ready for taking action for union representation when the time is right.

Belgium

The metalworkers' union **MWB-FGTB** reports on developments related especially to batteries for energy storage and battery recycling.

ABEE (Avesta Battery & Energy Engineering) is developing a Be-Volt Battery plant which is expected to be operational in 2026 and employ up to 200 people. The production capacity is estimated at 3 GWh/year, with more than 100,000 batteries produced each year. They are also studying alternatives for a location for a recycling facility. An ABEE factory producing battery cells project was abandoned in Wallonia mainly due to a lack of land available immediately and because the level of public subsidies requested by the company could not be met. The company has reoriented its investment in Eastern Europe.

An electric car recycling centre belonging to the **Comet Traitements** group in Châtelet and Obourgis the first of this kind in Belgium. Since 2019, the end-of-life of hybrid and electric vehicles has been organised, in particular through the commitment of importers of 42 brands, in collaboration and with the support of Febelauto by organising the trade-in of their complete hybrid or electric vehicles, including traction batteries.

Sortba in Tienen re-uses used electric car batteries and re-packages them into storage capacity, and turns them into cutting-edge battery energy system storage systems to store surplus photovoltaic or wind production and thus contribute to grid balancing. Last year, Sortbat acquired Høyenergi of Norway for the sustainable management of large end-of-life batteries including those from electric vehicles (EVs), maritime applications and energy storage systems (BESS).

Envirolead group is already active in the recycling and reuse of batteries in Wales (UK). Their aim is also to set up a plant in Belgium, capable of absorbing the recycling and processing of 120,000 tonnes of used batteries per year collected in Belgium, Germany, the Netherlands and France. The unit in Ghlin will carry out various recycling operations to separate and recover plastics from battery shells, acids and lead, expected to employ 140 workers and requiring an investment of nearly 60 million euros. The Walloon Region has approved a budget of €23 million to support the project and granted the permit, with the aim of supporting a model factory of its kind. It was supposed to be launched in 2025, but is now estimated to be completed by 2027.

The **ACV-CSC METEA** metal and textile workers' union reports on **Umicore**, a company that employs 800 workers in the production of battery materials and recycling of batteries in Belgium, Poland, Finland, Germany and Portugal.

Sweden

The industrial workers' union **IF Metall** reports that due to **Northvolt's** bankruptcy, there has been a bit less interest in the sector. Unfortunately, some other companies that were to supply Northvolt also went bankrupt. American **Lyten** is still planning to take over Northvolt's operations, but they have not been able to come up with the money for the deal. This is highly unusual and the union is looking into it, because the deal was supposed to have been concluded.[1]

Novo Energy was set up in 2021 by Northvolt and Volvo Cars, with an original plan to build a gigafactory employing around 3,000 people at Torslanda near Gothenburg. After Northvolt's bankruptcy, Volvo Cars took over its shares and started to search for a new technology partner, so far without success. Therefore, the company in January 2026 gave redundancy notices to all 75 employees, while partner search continues. Northvolt and Volvo are believed to have invested over €1bn in Novo Energy. In November 2025, the startup also received a €201m grant from the EU's Innovation Fund.

The **Volvo Trucks** battery plant in Mariestad is still going as planned, with construction works expected to start in 2026-2027. **Scania** has some minor production in Södertälje with maybe 100-200 workers. They – like the workers dismissed at Northvolt and Novo Energy - are covered by IF Metall's sectoral collective agreement Teknikavtalet.

Already years ago, IF Metall put together a comprehensive organising plan for Northvolt. The plan can be relaunched and applied in other future factories. As soon as workers start arriving at the plant, IF Metall

[1] Shortly after the finalisation of this mapping update (February 2026), media reported that the US battery technology company Lyten had agreed to take over key assets of the Swedish battery manufacturer Northvolt. Lyten aims to stabilise and gradually restart production in Sweden, but the implications for European battery investments and employment still remain unclear.

starts organising them with an introduction of the union. Right now, the union is using its regional health and safety officers to monitor the construction phase which it sees as the first phase of an organising plan.

4. Summary and next steps

The industry reports and replies to the questionnaire show that while some battery factories and supply chain plants are already in operation, most projects are still under construction or at planning stage. There is a lot of unclarity about future, and much will depend on the development of electric vehicle production and sales.

Unions in Poland, Hungary, France, Germany and Sweden report that they have already managed to organise some workers and set up local unions. Some of them have secured collective bargaining coverage. Health and safety concerns are reported as a problem in many countries.

Slow sales development of electric vehicles has also slowed down battery factory construction projects and offered more time for industriAll Europe affiliates to start developing their **organising plans.**

While unions are discussing their approach, here are some actions that will happen in 2026 and also some points to think about in the continuation:

- **Prolongation:** IndustriAll Europe plans to extend the project duration without additional spending, because battery investments and ramp-up are slower than expected, as the mapping demonstrates.
- **National workshop in Spain** in May has been agreed upon with the Spanish unions to be added to the project actions, following several announcements of major investments and Spain emerging as a battery hub.
- **Final project conference** will take place in Brussels in October, focusing on lessons learned and good practices, supply-chain organising approach, cross-border leverage, the European and global dimension of the sector, and future work.
- Organising action continues, including in **Hungary** (focused organising campaign at **SK On**, using **social listening and digital organising** methods) and **company gate actions in all project countries in Central and Southeast Europe,** (coordinated leafleting using the OSH flyers as a shared European action line).
- Occupational health and safety (OSH) concerns expressed by workers emerge as a key issue for organising efforts. **IndustriAll Europe's Charter for Health and Safety in Battery Production** provides a set of six demands to companies, which can be used in campaigns to attract workers, using the already produced and rolled-out **OSH leaflets**. Another OSH Charter on Battery Recycling is under preparation.
- The **Ad-Hoc Task Force for the Battery Industry** involving IndustriALL Global Union will continue to operate as an ongoing coordination space, bringing in the global supply chain angle, and ensuring the European and global relevance of our work on batteries.
- When choosing **target companies for organising**, think about connections with major auto companies, such as Mercedes-Benz, Stellantis, Volkswagen and Renault. Most of them have signed Global Frameworks Agreements (GFA) with IndustriALL Global Union, and/or have European Works Councils (EWC), a union network, and a functioning relationship with industriAll Europe. This could provide leverage for organising efforts.
- Many of the major investors are from **China** (CATL, Envision) and **South Korea** (Samsung, SK, LG Energy Solutions). Some companies are present in different European countries. Participating

unions have reported difficulties with their attitude towards unions. It is worth examining a cross-border effort, targeting one or several Chinese and South Korean players together. And then there is a possibility for East-West trade union solidarity, notably with South Korean unions which has been demonstrated in the ongoing conflict with Yura in Serbia, also involving unions from other countries. Samsung is unionised in South Korea, which could provide an opportunity for joint action.