



➤ Enabling the future

2025 Highlights

A YEAR OF STRATEGIC FOUNDATIONS
FOR DUTCH BATTERY LEADERSHIP



**Battery
Competence
Cluster - NL**

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➤ Introduction

Europe stands at a turning point. The energy transition, geopolitical developments and pressure on industrial competitiveness converge in one central question: how do we remain economically strong while becoming less vulnerable in a world of interdependence? Batteries are a key part of the answer - not as an isolated technology, but as the backbone of electrification across mobility, industry and the energy system.

The transition away from fossil fuels is necessary and irreversible. Yet as old dependencies fade, new ones emerge, particularly around critical raw materials and global value chains. For Europe and for the Netherlands, the challenge is therefore not full self-sufficiency, but resilience. This requires innovation, European production capacity and a deliberate diversification of international partnerships and collaborations.

For the Netherlands, this debate is tangible and urgent. We are a relatively small country, but a recognised innovation leader, thanks to a strong ecosystem of companies, knowledge institutions and public authorities that work together effectively. At the same time, we must be realistic: we will not compete on industrial scale alone. Our strength lies in organising smartly, acting quickly and working together with focus.

In 2025, the energy surrounding battery development in the Netherlands became clearly visible. Across the country, initiatives emerged along the full value chain - from materials and production to systems, applications and recycling. Although the sector is still young, it is rapidly maturing into a strategic growth market that will shape not only the energy transition, but also future economic activity and employment.

This momentum is reflected internationally. Through company visits, international events and delegation missions across Europe and beyond, it became clear how fast the global battery landscape is evolving. Equally important is what happens within these interactions: Dutch organisations connect more closely, strengthen one another and position themselves within European and global value chains. It is this combination of internal cohesion and external engagement that creates lasting impact.

Growth, however, does not emerge automatically. In a fast-moving ecosystem with many parallel initiatives, fragmentation is a real risk. Progress requires focus, coordination and the ability to translate shared ambition into concrete action.

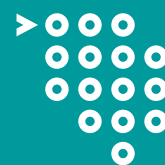
That awareness grew strongly in 2025. Across industry, research, government and international partners, a collective movement is taking shape. Within this context, the Battery Competence Cluster is not just an organisation, but a shared platform - connecting, directing, enabling and positioning the Dutch battery ecosystem.

This year was about laying the groundwork. The coming years will be about acceleration and scale.

This yearbook shows how that foundation was built - and sets the stage for the impact that lies ahead.



Mustafa Amhaouch
Director Battery Competence Cluster - NL



➤ 01

We Connect

► Building the bridges that make the Dutch battery ecosystem stronger

A competitive battery ecosystem can only grow when people, organisations and ideas connect. BCC-NL creates the spaces, programmes and networks where this happens across industry, research, government and society. We bring together partners who would not naturally meet, strengthen collaboration across the battery value chain, and ensure that knowledge, challenges and opportunities are shared openly and constructively.

In 2025, this connecting role became more visible than ever. Through events, strategic sessions and cross-sector meetings, BCC-NL created the momentum and trust that allow the Dutch battery ecosystem to collaborate with confidence.



BATTERY DAY 2025:

➤ Strengthening the National Battery Community

A major highlight was Battery Day 2025, where hundreds of stakeholders gathered for a full-day programme focused on the future of the Dutch battery ecosystem. Researchers, start-ups, industrial partners, policy-makers and regional leaders met to exchange insights, showcase innovations and explore new collaborations. The event highlighted:

- the growing maturity of the Dutch battery landscape,
- the increasing number of companies active across the chain,
- the strong presence of talent and new research,
- and the shared drive to build a competitive national industry.

Battery Day has become the annual moment where the Dutch ecosystem meets, connects and aligns - and BCC-NL plays a central role in shaping that community.





CONNECTING RESEARCH AND NATIONAL STRATEGY:

➤ NWO & NGF Battery Programme Meeting

Another key milestone was the joint session with NWO and the National Growth Fund Battery Programme *. This meeting strengthened the connection between fundamental research, applied innovation and national programme execution. BCC-NL contributed by bringing together programme leads, research institutions, ministries, regional partners and industry representatives.

This session exemplifies how BCC-NL ensures that science, policy and industry remain connected on content, timelines and long-term vision.

The result:

- improved alignment of project pipelines,
- clearer visibility of upcoming research priorities,
- stronger cohesion between scientific excellence and industrial needs,
- and a shared understanding of how Dutch strengths contribute to European ambitions.

* MICB (Material Independence & Circular Batteries)

CONNECTING ENERGY STORAGE COMMUNITIES:

► Spotlight on Long Duration Energy Storage (LDES)

In 2025, BCC-NL also actively contributed to the national conversation on Long Duration Energy Storage (LDES) - a crucial yet often overlooked component of a reliable and flexible energy system.

During a well attended event organised with Energy Storage NL, experts, companies, policymakers and innovators came together to explore the role of LDES technologies in enabling large scale flexibility. Themes included the strategic importance of long duration storage for system stability, the technological options currently emerging, and the pathways for industrial rollout in the Netherlands.

The session brought together stakeholders from both the short-duration and long-duration storage communities (short-cycle and long-cycle storage) - reinforcing the bridge between battery technology, LDES innovation and broader energy system needs.

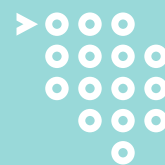
This event strengthened collaboration across sectors that traditionally operate separately but increasingly depend on one another.





Build Together

Through Battery Day, national programme sessions and daily ecosystem facilitation, BCC-NL strengthens relationships, builds trust and connects ideas, people and opportunities. These connections form the backbone of a mature, internationally competitive Dutch battery industry - one that grows not because of isolated effort, but because we build it together.



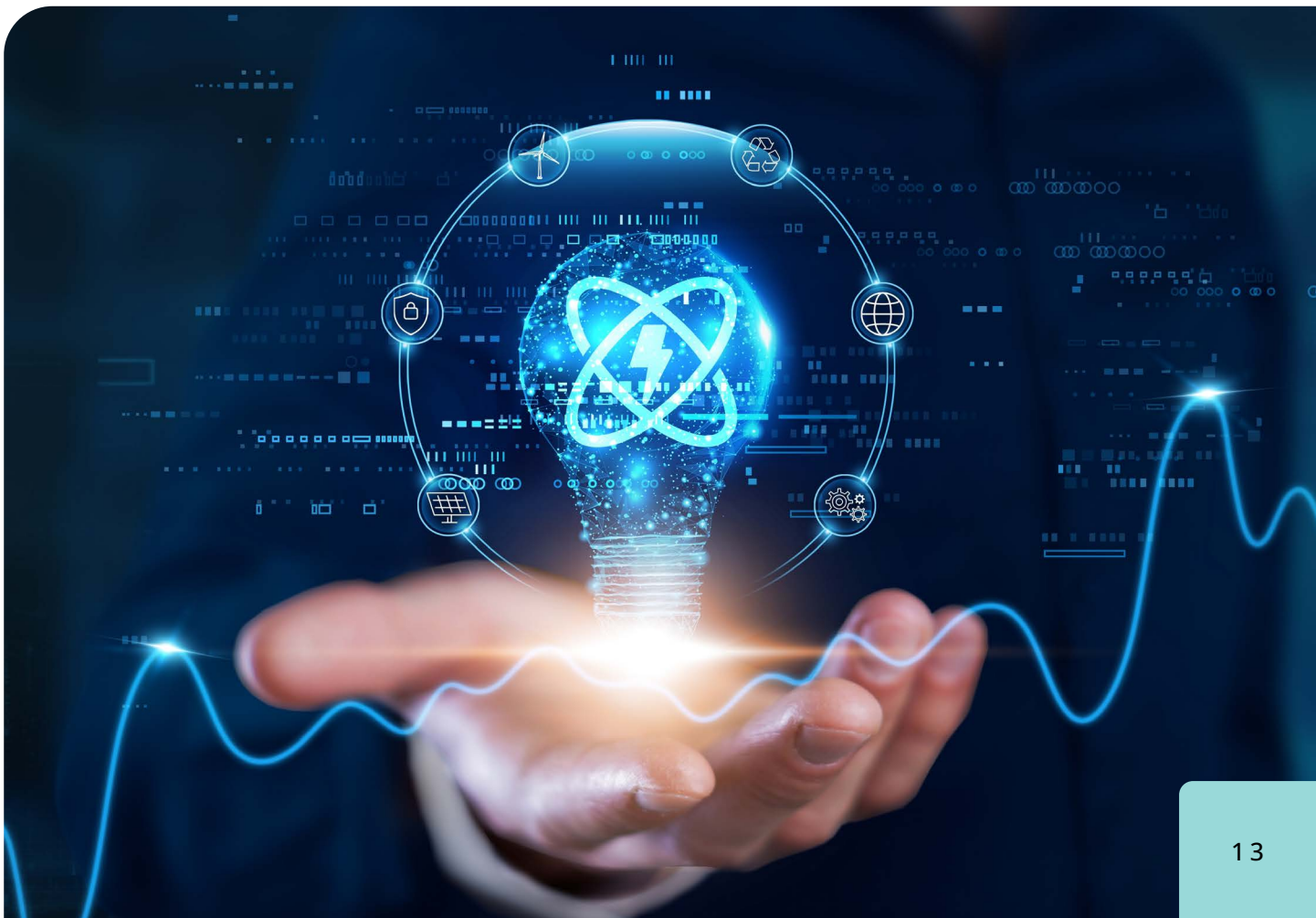
➤ 02

We Direct

➤ Providing strategic direction for a coherent, future-proof Dutch battery ecosystem

To build a strong, competitive and sustainable battery value chain, clear direction is essential. BCC-NL fulfils this role by developing strategy, roadmaps and priorities for the Dutch battery domain, and by translating these into joint action and decision-making. We guide partners towards a shared vision and ensure that industry, knowledge institutions and government are aligned - from long-term ambitions to near-term implementation.

Last year our strategic role strengthened significantly. With major national agendas emerging and international competition increasing, BCC-NL provided direction where clarity, coherence and collective focus were needed most.



GUIDING THE NATIONAL STRATEGY:

➤ Action Agenda for National Technology Strategy

In 2025, BCC-NL contributed extensively to the development of the Action Agenda for the National Technology Strategy (NTS). By connecting partners across the battery value chain, structuring recommendations and ensuring coherence with national ambitions, BCC-NL helped bring collective priorities into concrete action points.

This work directly aligns with the “Kamerbrief Voortgang Strategische Aanpak Batterijen” (December 2025), which underlines the strategic importance of batteries for Dutch competitiveness and energy independence.





THE BATTERY COMPASS:

➤ A Strategic Navigation Tool for the Energy Transition

The Dutch Battery Compass is more than a report - it is a strategic navigation tool that maps the future needs of applications such as electric trucks, buses, and even aviation against the expected Technology Readiness Levels (TRLs) of new battery technologies between 2025 and 2035. This initiative translates global trends, combines Dutch technology roadmaps, and benchmarks capabilities to identify opportunities and risks for the Netherlands.

The Battery Competence Centre Netherlands (BCC-NL) spearheads this effort, uniting key players from industry, research, and academia. It directs future ambitions and collaborations at both national and international levels, further strengthening the Dutch battery ecosystem.

The Battery Compass aligns with European initiatives such as BEPA and ETIP Batteries Europe, ensuring that Dutch roadmaps can be directly connected to EU funding and industrial programmes.



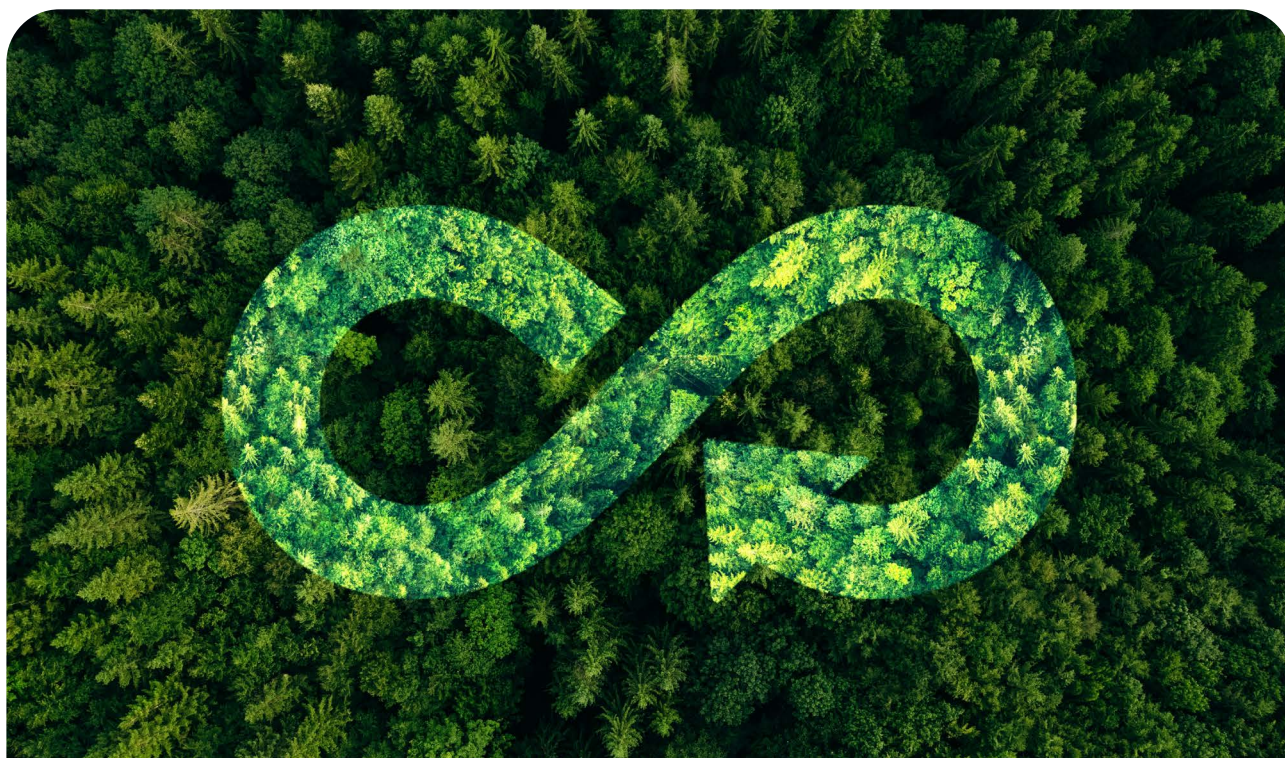
➤ *Scan QR code to download*

➤ Directing Circular Battery Strategy Within the National Programme for a Circular Economy

In 2025, the Netherlands launched the updated National Programme for a Circular Economy (NPCE) - a cornerstone for the country's transition towards circularity. Within this broad national agenda, BCC-NL played a guiding role in shaping the battery-specific direction, ensuring that circular battery materials, design-for-circularity principles, recycling capacity and energy-intensive process strategies were properly embedded.

Our contribution focused on tying battery circularity to industrial competitiveness: strengthening domestic supply security, stimulating high-value recovery technologies and enabling new business models for reuse and repurposing.

In doing so, BCC-NL helped position batteries as a priority theme within the broader Dutch circular economy strategy - connecting environmental goals to technological innovation and manufacturing growth.





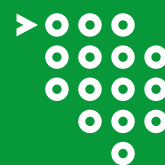
HUMAN CAPITAL IN BATTERY TECHNOLOGY:

➤ Battery Box and Metro Lines

Strategic direction requires shared understanding. Through our Human Capital Pillar, we contributed to the development and launch of the Battery Box (for education) and the Metro Lines Battery Technology (for professional upskilling), together forming a system-level tool to guide stakeholders across the value chain.

For Vocational Education, the Battery Box offers a practical teaching toolkit for educators, strengthening early-stage talent development. For professionals, the Metro Lines provide clear, modular learning routes on VET level, higher professional education and academic university level, supporting upskilling and reskilling aligned with industry needs. Together, they enhance the national foundation for long term human capital in battery technology - a crucial component of strategic direction.

Through active coordination and structured decision-making, we helped the ecosystem determine what should happen now, what should come next, and where the Netherlands can claim global leadership.



➤ 03

We Enable

➤ Driving execution by empowering projects, programmes and partnerships to accelerate

The enabling role of BCC-NL is essential for the growth of the Dutch battery ecosystem - particularly for mid-sized companies, startups and scale ups, as well as established industry.

Many organisations face challenges in finding the right partners, navigating funding opportunities, aligning with standards, or gaining the visibility needed to grow.

Catalyst for Progress

BCC-NL strengthens cohesion, ensures continuity and helps promising innovations grow into industrial-scale activities. We bridge the space from innovation to production, ensuring that new technologies do not remain stuck in R&D, but progress towards factories, jobs and export potential. In 2025, BCC-NL strengthened its position as a catalyst for progress. By initiating, connecting, accelerating and unblocking, we help the Dutch battery ecosystem grow - from first idea to full industrial execution.





➤ The Start of Five Growth Fund Projects

A key highlight of 2025 was the formal approval and start-up of five National Growth Fund projects in the battery domain. These initiatives - spanning recycling, circularity, next generation materials and electrification - mark a substantial step forward for the Dutch battery ecosystem. BCC-NL played a central role in supporting consortium formation, strengthening proposals and connecting the right industrial and academic partners. The projects launched in 2025 include:

The Five Projects

- **SiLENT FLIGHT** - advancing battery technology for electric aviation
- **CRM-LION** - focusing on circular recovery of critical raw materials from lithium-ion batteries
- **CIMBATT** - building a circular battery value chain for heavy-duty and industrial applications
- **SMART-CBAT** - enabling smarter, more sustainable battery materials and manufacturing
- **SLDBatt** - awarded funding for long-duration energy storage development



MILESTONE:

➤ OBIC: The First Open-Access National Battery Industrialisation Facility

A major milestone was the selection of OBIC (Open Battery Industrialisation Centre) in Noord-Brabant as the location for the first open-access national battery industrialisation facility. Throughout 2025, BCC-NL supported the process by connecting stakeholders, contributing to the positioning, and ensuring alignment with both national and regional innovation agendas.

This facility forms a crucial building block in developing a robust industrial base: a place where start-ups, SMEs, researchers and industry can test, validate and scale their technologies.





IMKE:

➤ Enabling Industrial Scale-Up in the Dutch Battery Manufacturing Landscape

In 2025, the IMKE portfolio represented €58.1 million in total project investments, of which €19.8 million was granted as subsidies. Through IMKE, Dutch battery manufacturers receive targeted support to build, expand, or modernise production lines for climate-neutral and future-proof energy-storage technologies.

In 2025, IMKE represented €58.1 million in total investments, of which €19.8 million was granted as subsidies to accelerate industrialisation. Across the full battery value chain - from components and modules to emerging chemistries - these IMKE-supported projects demonstrate how creating the right enabling conditions directly drives manufacturing growth, job creation, and greater strategic autonomy for the Netherlands.

The IMKE Portfolio

The IMKE portfolio consists of 11 industrial projects, each contributing to a more competitive and resilient Dutch battery manufacturing sector. These initiatives reflect IMKE's core objectives: upscaling, automation, competitiveness, autonomy, and sustainability.



➤ NGF Follow Up Visit

In September 2025, BCC-NL organised an important National Growth Fund visit to the Brainport region. Partners such as LionVolt, LeydenJar, E-magy, Tulip Tech, VDL ETS, AQUABATTERY, TNO, CarbonX and WMC shared progress, challenges and future ambitions across the full battery value chain.

This visit not only demonstrated the scale and diversity of Dutch battery innovation but also reinforced the importance of BCC-NL's role in connecting activities, guiding programme lines and ensuring alignment across the ecosystem.

➤ The Roadmap to Future Prosperity

2025 also marked the publication of the Wennink report on strengthening the Dutch battery industry. BCC-NL played a facilitating role by bringing stakeholders together, structuring input, and ensuring that the report's findings could directly inform national strategy development across five battery-related projects. The report emphasised the urgency of coordinated action, improved collaboration, and strategic long-term investments - themes that align closely with BCC-NL's enabling mandate.

Each project demonstrates how BCC-NL helps translate national strategy into real programmes, real consortia, and real execution. BCC-NL supports these developments by connecting stakeholders, aligning projects with national strategic priorities, and ensuring companies are integrated into broader programme lines and supply chains.



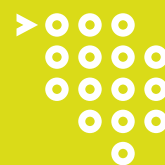
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Part of a Bigger Picture

By preparing projects, facilitating the right partnerships, and strengthening their strategic positioning within national agendas, BCC-NL helps ensure these industrial investments do not stand alone - but instead form part of a coherent, future-proof battery manufacturing strategy for the Netherlands.

THE ROADMAP TO FUTURE PROSPERITY

A strong Netherlands
in a relevant Europe



➤ 04

We bring it
abroad

INTERNATIONAL POSITIONING

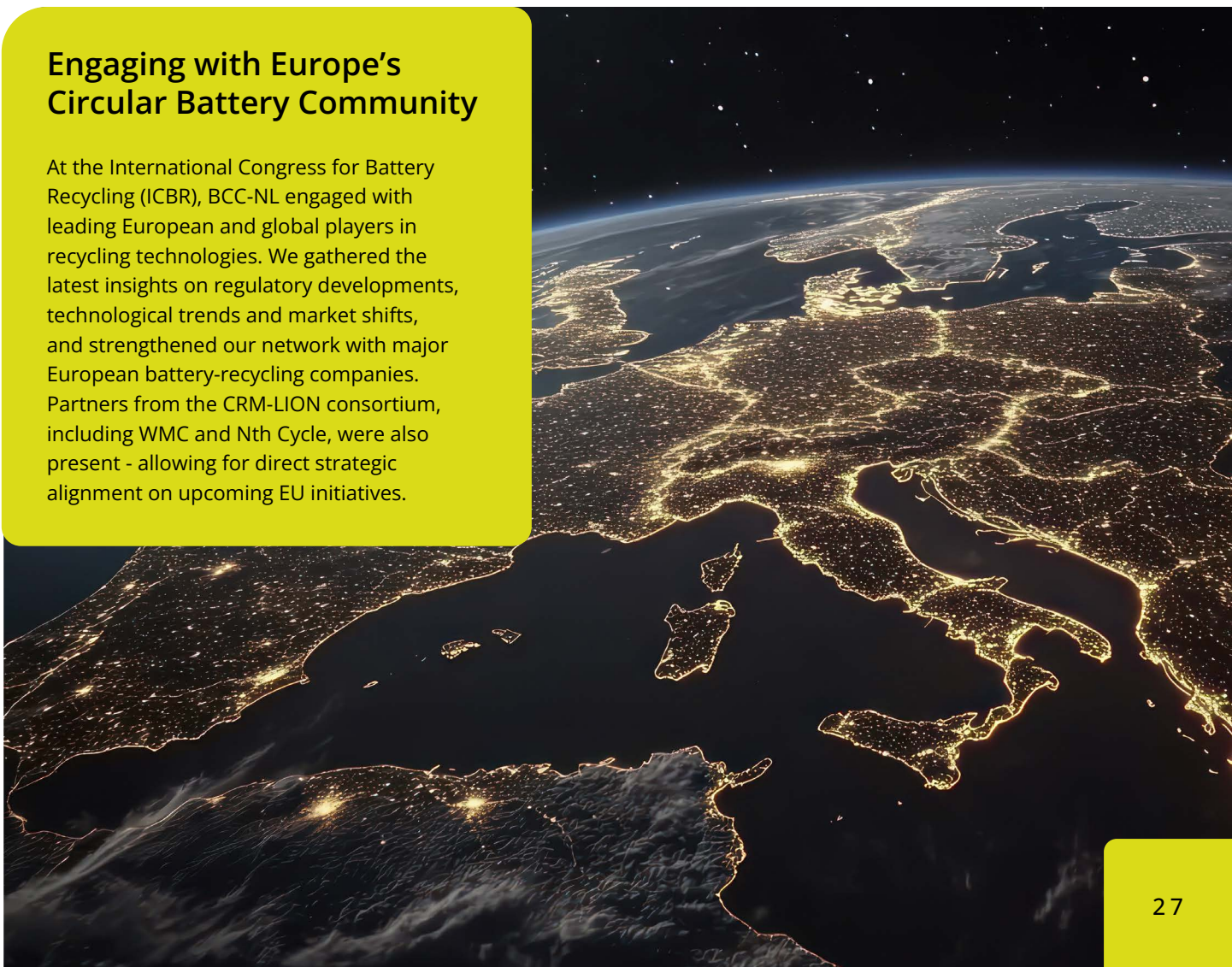
➤ Connecting to European and Global Value Chains

To strengthen the Dutch battery ecosystem, international visibility and strategic engagement are essential. BCC-NL represents the Netherlands abroad, builds relationships across borders, and ensures that Dutch companies, researchers and policymakers are connected to European and global value chains.

In 2025, we expanded our international footprint significantly - from Europe to Asia - opening doors for collaboration, investment and strategic alignment.

Engaging with Europe's Circular Battery Community

At the International Congress for Battery Recycling (ICBR), BCC-NL engaged with leading European and global players in recycling technologies. We gathered the latest insights on regulatory developments, technological trends and market shifts, and strengthened our network with major European battery-recycling companies. Partners from the CRM-LION consortium, including WMC and Nth Cycle, were also present - allowing for direct strategic alignment on upcoming EU initiatives.



➤ Connecting with European battery-recycling projects

Together with InnovationQuarter, BCC-NL joined a high-level session in Brussels focused on ongoing EU battery-recycling projects. The aim:

- identify opportunities for Dutch participation,
- position Dutch capabilities within existing European project pipelines,
- and gain a clear overview of activities beyond CRM-LION.

Follow-up is ongoing with BEPA, the European Commission, and multiple long-running EU projects - including engagements with the Future4Batt network and leading circular-battery initiatives across Europe.



➤ Building Strategic International Relationships

China: Exploring industrial opportunities

During a multi-day mission to China, BCC-NL met with advanced manufacturers, research institutes and battery innovators. We explored:

- the state of next-generation battery production,
- opportunities for Dutch companies to collaborate or co-develop,
- and strategic insights for the Dutch China exploration strategy.

Incoming visits from Sunwoda and Montavista strengthened this dialogue and opened new avenues for partnership.

Sweden: Collaboration at EVS38

At EVS38, BCC-NL contributed to the NL Pavilion and engaged with Swedish partners on electrification, manufacturing and circularity. This strengthened bilateral relations and explored opportunities for joint projects within mobility and storage value chains.

South Korea: Deepening collaboration

BCC-NL continued strengthening ties with South Korea - one of the world's leading battery nations. A Market Exploration request for Korea was approved, paving the way for structured collaboration between Dutch and Korean ecosystems.

France: Strengthening cross-border cooperation

In 2025, France emerged as one of BCC-NL's most active international partners. During the Dunkerque Batteries Event, the Dutch delegation - one of the largest present - engaged closely with the rapidly expanding French battery ecosystem. As part of the programme, BCC-NL organised high-impact industrial visits to the ACC Gigafactory, Verkor Gigafactory, and the EDF Nuclear Power Plant, providing insight into large-scale European cell manufacturing, fast-scaling high-performance battery production, and the French energy backbone supporting electrification. BCC-NL also participated in the opening of the new Netherlands Business Support Office (NBSO) in Dunkirk - a strong symbol of deepening economic ties between the regions.

Germany, Brussels & Europe-wide Networks

- **Munich: Collaboration with South Korea & industry partners.** In Munich, BCC-NL participated in InterBattery Europe, connecting Dutch companies to global suppliers and advancing discussions on Korean–Netherlands cooperation.
- **Brussels: BEPA signing & engagement with the European Commission.** In Brussels, BCC-NL attended the launch of BEPA activities with Commissioner Wopke Hoekstra, reinforcing our role as the Dutch gateway to European strategic initiatives.
- **At the Hannover Messe, BCC-NL held a strategic discussion with the Minister** - reinforcing the importance of international positioning for national battery ambitions and showcasing Dutch strengths on a global stage.



➤ Welcoming International Delegations

In 2025, BCC-NL hosted multiple international delegations exploring opportunities within the Dutch battery ecosystem, further strengthening the Netherlands' position as a hub for battery innovation and manufacturing. Among the companies welcomed were Sunwoda and Montavista, two influential players in Asia's rapidly growing battery landscape.

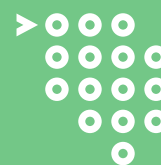
Sunwoda, one of China's leading lithium-ion battery manufacturers, produces battery systems for consumer electronics, electric vehicles, and large-scale energy-storage applications. The company develops modules for smartphones, laptops, tablets, EVs, and various industrial uses, and has expanded its global footprint with manufacturing sites across Asia, Europe, and other regions.

Montavista (Anhui Mengwei New Energy Technology) is an emerging Chinese innovator in next-generation lithium-metal and solid-state batteries. The company focuses on high-energy-density materials and advanced battery cell manufacturing for electric vehicles, drones, and aviation technologies, pushing performance boundaries critical to future energy-storage systems.

Visible and Connected

By engaging with international partners, attending strategic events, hosting global delegations and maintaining strong ties with European and global networks, BCC-NL ensures that Dutch battery innovation, industry and circularity expertise are visible and connected worldwide. This international positioning strengthens cooperation, accelerates project development, and opens doors for Dutch companies in global value chains.





➤ 05

Outlook for 2026



➤ Accelerating Dutch Innovation, Industry & International Positioning

The period ahead marks a next phase in the development of the Dutch battery ecosystem. While recent years focused on building and connecting an innovation pipeline, the challenge is increasingly shifting toward acceleration and scaling.

Continued investment in innovation remains essential. The strength of the Netherlands lies in consistently feeding the pipeline with new ideas, technologies and applications. At the same time, an equally significant challenge is emerging: the industrialisation and scaling of innovations that have moved beyond the development stage. It is precisely at this intersection - from innovation to production - that the real difference will be made in the coming years.

A crucial prerequisite for this transition is the availability of talent. The Human Capital agenda will therefore be actively implemented, in close cooperation with educational institutions across different regions of the country. Without sufficient, well trained talent, there can be no innovation, no scaling and no sustainable growth of the sector chain.

Internationally, the next step will also be taken. Cooperation with the five focus countries will be further deepened and made more concrete, with the aim of realising joint projects and long term strategic partnerships. This will strengthen not only our international position, but also access to knowledge, markets and industrial capacity.

In parallel, BCC-NL itself will continue to develop from a start up organisation into a more mature and robust operational entity - one that is able not only to connect the ecosystem, but also to strengthen and accelerate it structurally.

The challenge is substantial, but the foundation has been laid. With energy, commitment and close cooperation with our partners, we will continue to build a strong and competitive Dutch battery ecosystem.

Together, we accelerate the growth of the battery value chain.

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ENERGISING TECHNOLOGIES



Battery
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BCC-NL partners:

- Oost-NL
- Brainport Development
- RAI Automotive Industry NL
- ARN Autorecycling Nederland

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