

Europacable calls to urgently re-introduce power cables into the IAA: Securing Cables for Electricity Transmission and Distribution Made in Europe for Europe's Decarbonisation, Strategic Autonomy and Energy Sovereignty

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Europacable urges EU co-legislators to reintroduce power cables for electricity transmission and distribution within the scope of Union origin requirements of the proposal for a European Industrial Accelerator Act covering the EU, EEA/EFTA countries and the UK.

Europacable, the voice of Europe's leading wire and cable manufacturers, welcomes this opportunity to share its recommendations and urges EU co-legislators to place power cables at the heart of the ongoing discussions on the proposal for a European Industrial Accelerator Act (IAA).

The European cable industry faces strong and not always fair competition from countries that neither reciprocate market access nor respect a level playing field. This can be observed in the market and is acknowledged in the Commission's Impact Assessment report to the IAA proposal.¹

Due to the critical nature of power cables for Europe's energy sovereignty and security of energy supply, Europe's technology leadership and the industry's ability to meet demand, power cables for transmission and distribution must be reinstated in the scope of the Union origin requirements of the IAA proposal.

Accordingly, Europacable calls to amend Art. 34 - Amendments to Regulation (EU) 2024/1735, Annex II, Part I – Public Procurement, 1. as follows:

- ***New (f) Electricity grid technologies: From [OP: Please insert the date = 1 year after entry into force of this Regulation], cables and lines for electricity transmission and distribution, and cables connecting net-zero technologies to the electricity grid (overhead lines, underground and undersea cables, including HVDC and HVAC) shall originate in the Union.***

Power cables, as a core component of NZIA electricity grid technologies, were consistently included throughout the European Commission's drafting process from the very inception of the legal text and were only removed at the final stage prior to publication. The Impact Assessment Report accompanying the final proposal explicitly calls for targeted "Made in Europe" requirements for these critical electricity technologies, further underscoring the need to ensure their full inclusion.²

Hence, Europacable calls on EU co-legislators to reinstate power cables within the scope of the Union origin requirements of the IAA proposal as a matter of priority and urgency. With the investments already made, European cable system manufacturers are ready to meet Europe's demand for transmission and distribution cable systems. Additional investments in manufacturing capacity will be secured as and when longer-term, predictable, and accurate demand visibility will be committed.

¹ Impact Assessment Report accompanying the proposal for a European Industrial Accelerator Act, SWD (2026) 71 final, European Commission, 4th March 2026, page 302

² Idem, page 295

We believe the urgent reintroduction of power cables for electricity transmission and distribution in the scope of the Union origin requirements of the IAA proposal is imperative because:

- 1. Evidence suggests that heavily subsidised non-European cable manufacturers are building overcapacities threatening a fair and level playing field for power cables in Europe. This may specifically apply to some Asian countries, including China;***
- 2. The European cable industry, with its strong presence across the EU, EEA and the UK, is the world leader offering cutting edge cable system technology empowering Europe's decarbonisation. It has the capacity to meet Europe's electricity transmission demand with power cables "made in Europe for Europe", including substantial investments which will more than double production and installation capacity by 2030;***
- 3. European cable system manufacturers supply and will continue to supply infrastructure projects and tenders within required timelines. Power cables are not a critical bottleneck in electricity infrastructure deployment;***
- 4. Europacable strictly adheres to compliance rules and cannot directly engage in discussions on cable production cost differentials or their impact on project deployment. This said, in general terms, Europacable can point out that notably copper, aluminium and plastics as key raw materials for cables have been subject to significant price increases of the past five years. Furthermore, the evolution of cable technology to currently 525 kV HVDC will substantially increase the transferred power per kilometre, whilst requiring more conductor materials such as copper or aluminum. Finally, awarding projects to European cable manufacturers delivers clear societal benefits by boosting Europe's GDP growth, competitiveness, and quality jobs – and EU funding support for infrastructure build out shall not benefit non-European suppliers or societies.***

More generally,

- Underground and subsea power cables are a strategic net-zero technology that empowers Europe's decarbonisation. They are and will be the core backbone technology of Europe's future transmission grids;
- Europe's cable manufacturers are global leaders delivering cables made in Europe for Europe's grid expansion. With over €4 BN in ongoing investments, they are scaling up to meet rising demand, set to more than double medium-voltage (MV), high-voltage (HV) and extra-high-voltage (EHV) cable system production and installation capacity by 2030. The EU must secure its strategic autonomy in this critical technology;
- Secure and resilient underground and subsea cables are essential to Europe's stability and prosperity as well as the strategic autonomy. In light of recent attacks on critical infrastructure, the EU and Member States must strengthen security, accelerate grid investments, and avoid dependence on non-European suppliers for critical components. The reference to reliable suppliers is also included in the Directive on the Resilience of Critical Entities, the Network and Information Systems Regulations (NIS 1 & NIS 2).

Europacable calls on the EU co-legislators to urgently reintroduce power cables for transmission and distribution into the scope of the Union origin requirements of the IAA proposal, covering the EU, EEA/EFTA countries and the UK. Doing so is imperative to ensure the supply of transmission and distribution power cables made in Europe for Europe's decarbonisation, energy security, independence and sovereignty.

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Annex: Evidence to support urgent re-introduction of power cables in the scope of Union origin requirements of the IAA

1. Global market context – need to prevent unfair market practices

European cable system manufacturers, being globally engaged themselves, welcome competition in principle provided it is based on a fair and level playing field. Unfortunately, we have ample reason to believe that there are unfair market practices by foreign suppliers benefitting from a range of indirect/direct State subsidies. Some Asian players, including but not limited to China, may be benefitting from such subsidies. This is likely to lead to an overcapacity which risks threatening European cable manufacturers in the short term. The current buildup of annual overcapacity in China is almost exactly equivalent to the European annual demand. This can only be interpreted as an effort by Asian countries to gain a substantial share of the European market.

Europacable is convinced that it is therefore imperative to urgently reintroduce power cables for electricity transmission and distribution in the scope of the Union origin requirements of the IAA proposal covering the EU, EEA/EFTA, and the UK. By doing so, Union origin requirements will be established in public tenders, preventing the loss of domestic manufacturing capacity to high-carbon, likely State subsidised, imports and reducing strategic dependencies. The European solar panel industry was undermined in 1-2 years by a heavily subsidised Chinese oversupply dumped on the European market resulting in loss of manufacturing and jobs from EU. Today, the same scenario threatens the European cable industry. Action needs to be taken urgently to prevent this from happening again.

2. European Cable producers have capacity to supply required power cables “made in Europe for Europe”

The European cable industry has the capacity to supply Europe's electricity distribution and transmission needs with MV, HV and EHV underground and subsea cables made in Europe for Europe's decarbonisation, energy security, independence and sovereignty. In addition to that, with over EUR 4 billion investments currently under way, based on previous requests by European TSOs and developers, some already realised, Europacable member companies will more than double their production and installation capacity latest by 2030.

In its Impact Assessment Report, the European Commission considers EU production capacity in the context of the initial discussions on the IAA, which focused on Union origin requirements limited to EU-based production. Even under this narrower scope, the Commission clearly acknowledges that EU subsea cable production is expected to “*significantly exceeding deployment needs*” in the near future, while for HV direct current underground cables, “*the EU has sufficient capacity to fully meet its domestic deployment needs.*”³

With the expanded scope of the IAA now including, by default, countries with which the EU maintains close economic ties and agreements, the above-mentioned assessment should be seen as conservative. This is particularly true due to that fact that European cable manufacturers have a strong industrial presence not only within the EU but also in key partner countries such as the United Kingdom, Norway and Switzerland, all of which play an important role in supplying the European market.

³ Idem, page 299

Against this broader geographical scope, Europacable aggregated production figures for HV & EHV underground and subsea cables⁴ show that the European cable industry has a projected production capacity which clearly meets demand of:

- HV and EHV AC and DC underground cables: 6.000 core/km per year;
- HV & EHV AC subsea array cables for wind farms: 8.000 core/km per year;
- HV and EHV AC and DC subsea cables: 12.000 core/km per year.

Europacable aggregated production figures for HV & EHV underground and subsea cables

HV and extra HV Land cables			HV and extra HV Subsea cables					Total core/km per year
AC underground [core/km per year]	DC underground [core/km per year]	AC wind farms array cables [core/km per year]	AC wind farms export cables [core/km per year]	AC interconnectors [core/km]	DC wind farms export cables [core/km per year]	DC interconnectors [core/km per year]		
6000		8000			12000		26000	

These figures should be assessed alongside projected European demand for the same cable segments over the 2025–2035 period⁵. Evidence shows that the European cable industry is ready to supply Europe with power cables for transmission and distribution over the next decade. In particular, regarding the different segments:

- HV and EHV AC and DC underground cables: estimated production capacity of 6.000 core/km per year meeting a projected demand of around 2.300 core/km per year;
- HV and EHV AC and DC subsea cables: estimated production capacity of 12.000 core/km per year meeting a projected demand of around 8.500 core/kms per year.

Projected European demand for HV & EHV underground and subsea cables for 2025-2035

	HV and extra HV Land cables			HV and extra HV Subsea cables					Total core/km
	Projects analysed	AC underground [core/km]	DC underground [core/km]	AC wind farms array cables [core/km]	AC wind farms export cables [core/km]	AC interconnectors [core/km]	DC wind farms export cables [core/km]	DC interconnectors [core/km]	
2025-35 All	595	4653	22428	n/a	17742	300	38492	44626⁶	128241
2025-35 EU only	217 Cable >20km	1551	21376	n/a	11728	220	32122	40454	107451

⁴ Europacable member companies have aggregated their production capacity for HV and EHV underground and subsea cables through external legal counsel to ensure full compliance with EU competition law. For this purpose, manufacturing capacity for both AC and DC cables have been combined.

All capacity figures are expressed in core-kilometres and cover only the production facilities of Europacable members located within the EU, the UK and EEA/EFTA countries (notably Norway and Switzerland).

Production and demand figures for underground and subsea cables are expressed in core-kilometres (core-km), a standard industry metric used to measure manufacturing capacity. One core-kilometre corresponds to one kilometre of a single cable core. However, depending on the voltage level and technology, a single cable project may require multiple cores. As a result, one kilometre of project length may correspond to several core-kilometres of cable.

⁵ Europacable demand assessment for transmission cables is based on planned projects for the period 2025–2035, as identified in ENTSO-E's Ten-Year Network Development Plan (TYNDP) 2024, as well as in national plans from European TSOs and Member States, including those of EU countries, Norway, Serbia, Switzerland and the United Kingdom. This provides a robust and realistic estimate of future demand based on publicly available data.

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⁶ This figure excludes the 15,200km for the Xlinks project from Morocco to UK which has been cancelled after the UK Government decided not to provide the project with an off-take route.

Overall, the evidence demonstrates that the European industry's production capacity for MV, HV and EHV underground and subsea cables clearly matches, if not exceeds, the expected demand over the 2025–2035 period, both for EU-only needs and for wider European projects extending beyond the Union.

3. Lead times

Over the past years, lead times for the delivery of underground and subsea power cables increased as Europe's ambition to connect renewable power sources and interconnect its electricity markets turned into real project demand.

This said, since 2024 the increased granular, multiyear visibility, notably but not only thanks to the Ten-Year Network Development Plans published by ENTSO-E, combined with the first capacity increase investments materialising have alleviated this challenge. In 2024 all major European cable system manufacturers announced and started rolling out substantial investment programmes comprising a total of over EUR 4 billion. These will more than double production and installation volumes of power cables on land and at sea by 2030.⁷ Some of these investments have already materialised, others are under implementation, clearly showing that operational capacity is continuously added. With that, European cable system manufacturers will continue to meet growing demand with power cables made in Europe for Europe.

Accordingly, power cable supplies are not a bottleneck to Europe's grid buildout. It should be noted that a functioning "supply chain ecosystem" is needed, including predictable and accurate planning, efficient permitting procedures, supply chain coordination and overall project management. It follows that delivery times should not be assessed solely through the lens of short-term cost considerations, but rather in light of the overall capacity of the European industrial base to ensure reliability, quality, security of supply and continuity of execution over the medium to long term.

4. Power cables "made in Europe for Europe" secure our competitiveness and contribute to our economic prosperity

Electricity infrastructure projects awarded to European cable system manufacturers generate substantial economic value within the EU. They contribute directly to Europe's GDP growth, support European industrial competitiveness by boosting a highly specialised manufacturing base and providing high-quality jobs. Furthermore, they foster innovation, strengthen Europe's technological leadership in a strategic sector for Europe, and reinforce the resilience of critical electricity infrastructure supply chains. These wider benefits should be considered when assessing overall project value.

Europacable understands that policy discussions about a potential inclusion of power cables for transmission and distribution in the scope of the Union origin requirements of the IAA proposal will need to account for aspects related to costs and affordability. However, as an Association, Europacable cannot entertain any discussions, nor provide any figures or views regarding cable cost-related information, as we are fully committed to strictly abiding by EU competition law. Prices are determined by market dynamics, and any such information may only be provided by individual member companies.

In general terms, Europacable can point out that notably copper, aluminium and plastics are the key raw materials used in cable production. These are traded globally and hence subject to demand and supply fluctuations. For example, copper prices saw an increase of approximately 108% between 2019 and 2026 while aluminium costs rose by approximately

⁷ Examples include Hellenic Corinth expansion programme; Nexans Halden expansion inaugurated in 2024; NKT Karlskrona expansion operational from 2027; Prysmian Pikkala capacity increased targeted by 2026; TKF Eemshaven new plant; UK additions by JDR.

68% over the same period.⁸ Furthermore, any publicly available references to price indexes need to be carefully scrutinised with regards to actual product scope covered. The evolution of cable technology leading to ever higher voltages being carried through power cables requiring significantly more raw materials per route kilometre also needs to be accounted for.⁹ A technology upgrade should not be presented as an alleged cost increase narrative.

Having said that, Europacable believes that framing the debate about a potential inclusion of these grid technologies around their production costs and their impact on the timely deployment of Europe's needed distribution and transmission infrastructure risk oversimplifying a much more complex reality. The timely buildout of electricity distribution and transmission projects depends on a wide range of factors, including planning constraints, permitting procedures, supply chain coordination, and project management. Focusing narrowly on upfront procurement costs does not reflect these broader challenges.

A more holistic perspective is needed: Electricity infrastructure projects awarded to European cable system manufacturers generate substantial economic value within the EU. In this context, EU funding instruments such as the Connecting Europe Facility (CEF) play a strategic role. Ensuring that CEF-funded projects primarily benefit European cable system manufacturers would maximise the return on public investment for Europe by retaining economic value, expertise, employment, and a solid industrial base within the Union. They would also ensure Europe's independence from non-trusted non-European suppliers in a key strategic sector for Europe's future. In addition to that, prioritising European suppliers can contribute positively to project delivery itself. Proximity, established standards, regulatory alignment, and closer coordination with future asset owners can help mitigate risks related to logistics, compliance, and quality assurance. These elements are critical for avoiding delays and ensuring long-term reliability of infrastructure. Last but not least, an exclusive focus on initial cost would overlook key considerations such as quality, durability, sustainability, and security of supply. These factors are essential for Europe's energy security, independence and sovereignty.

Conclusion

In view of the above, Europacable calls on the EU co-legislators to urgently reintroduce power cables for transmission and distribution into the scope of the Union origin requirements of the IAA proposal covering the EU, EEA/EFTA and the UK.

Doing so is imperative to ensure the supply of transmission and distribution power cables made in Europe for Europe's decarbonisation, energy security, independence and sovereignty.

About Europacable

Europacable is the voice of Europe's leading wire and cable producers. High-quality, sustainable power and telecommunication cables, produced by our members in Europe, empower the electrification and digitalisation of our societies. Founded in 1991, Europacable represents the largest cable makers in the world providing global technology leadership, as well as highly specialized small- and medium sized businesses from across Europe.

With our future being ever more electrified and digitalised, cable technology will be the core backbone of Europe's energy and telecommunication infrastructures. Sustainable, low-carbon manufacturing and high-performance cables are essential to achieve Europe's climate neutrality objectives by 2050. Europacable is committed to the principles of free enterprise and fair trade. Our members employ over 80.000 people of which more than 50% in Europe, generating a worldwide turnover over € 70 billion in 2025.

Europacable is a member of Orgalim, RGI, WindEurope and a partner of CENELEC and EUEW. Europacable is listed in the European Commission's Transparency Register under 453103789-92. www.europacable.eu

⁸ Publicly available prices from the London Metal Exchange.

⁹ Cost of power cables may not be singled out on "price per kilometer per output". The majority of future EU demand of HVDC extruded power cable systems reflect high demanding performance requirements and output of power. A voltage increase from 320 kV DC (1-1.4 GW per system) to 525 kV DC (1.8-2.4 GW per system) will be the new standard. Each system will therefore transmit roughly twice the power. Moreover, many new HVDC projects require a Metallic Return (MR), increasing cables per circuit from 2 to 3.