SUBMARINE TELECOMS MARKET SECTOR REPORT:
REGIONAL SYSTEMS EDITION

To address the growing reporting and analysis needs of the submarine fiber industry, SubTel Forum Analytics continues its Market Sector Report series – designed to provide the industry with the information it needs to make informed business decisions. The Submarine Telecoms Market Sector Reports cover a specific sector of the submarine fiber industry and areupdated on a quarterly basis. The Regional Systems edition provides region by region overview of the state of the submarine fiber industry.

SubTel Forum Analytics collected and analyzed data derived from a variety of public, commercial and scientific sources to best analyze and project market conditions. While every care is taken in preparing this report, these are our best estimates based on information provided and discussed in this industry.

The following Executive Summary provides an overview of the topics addressed in the Regional Systems Market Sector Report.

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EXECUTIVE SUMMARY

The submarine fiber market continues to grow through 2020 at a similar rate to that observed since 2016. Some regions have begun to slow their pace with fewer systems planned beyond 2021. There are some overbuild concerns considering the rapid pace of system development over the last few years, but many cable systems that are reaching the end of their economic and technological lifespans and will need replacing.

Due to increasing capacity demands along the north Transatlantic between New York and Europe, and the desire for new connections to the Mid-Atlantic of the United States and across the South Atlantic, the Transatlantic route has enjoyed steady growth. The need for more infrastructure is on the rise by Content Providers operating in the region and upgrades to existing systems do not adequately meet demand. (Figure 1)

As with the Transatlantic market, until very recently the Transpacific has been almost fully saturated with available capacity, leaving little room for growth other than route diversity and cutting down on existing latency. Lately, however, new systems are being explored in a similar manner to the Transatlantic. Demand from Content Providers and increased desire for route diversity are the primary drivers behind these newer Transpacific systems.

Continuing off its strong growth trend, the Americas region has only a handful of systems planned for the next several years. The last few years have been relatively busy even compared to historical trends for the region. With a development rate that has remained steady since 2001, the period 2020-2023 should still be within historical

FIGURE 1: Systems in Service, Transatlantic
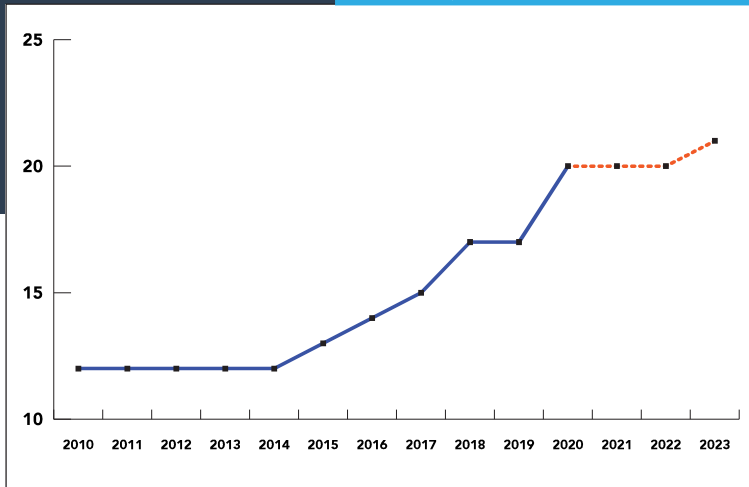
norms or even slightly ahead of them.

Most new systems in AustralAsia will connect small nations to mainland Asia or existing international pipelines, while a handful will span nearly the entire region. While this region has seen a tremendous amount of growth in recent years, activity has slowed down considerably. Most major population centers in the area have now been connected to the international telecommunications network and growth in the Pacific has shifted towards Transpacific routes connecting data center locations.

The EMEA region has averaged three new systems every year since 2002. This region has historically been characterized by the inter-regional cables as well as large coastal systems ringing Africa. The EMEA region is the most consistent in the world and has a growth pattern that is seemingly immune to the industry's boom and bust pattern seen over the past 15 years. Unfortunately, the EMEA region continues to be rife with economic uncertainty and political instability, casting a cloud over any prospective projects that go through the Middle East. However, new activ-

FIGURE 2: Systems in Service, Transpacific

ity is observed in exploring additional connectivity between Europe and India as well as new Nordic projects to support their growing data center market.

The Indian Ocean Pan-East Asian region does not generally have a strong telecoms presence on its own. However, with Australia looking for more route diversity from its western coast, an increasing desire for connectivity between Asia and Europe and the continued growth of India's telecommunications industry, the region is prime for growth. Additionally, there are hints that Content Providers will

explore routes from the United States to India and potentially bring more system development to the region.

Interest in Polar projects has grown over the past few years, as cable developers are looking to take advantage of significantly shorter routes that can be achieved through the Arctic Circle. Additionally, systems exploring Arctic routes avoid the troubled Middle East region and circumvent potential privacy concerns in the United States.

We hope this report will prove to be a valuable resource to the submarine fiber industry at large. To purchase this report, please click the link below. STF

KIERAN CLARK *is the Lead Analyst for STF Analytics, a division of Submarine Telecoms Forum, Inc. He originally joined SubTel Forum in 2013 as a Broadcast Technician to provide support for live event video streaming. He has 6+ years of live production experience and has worked alongside some of the premier organizations in video web streaming. In 2014, Kieran was promoted to Analyst and is currently responsible for the research and maintenance that supports the STF Analytics Submarine Cable Database. In 2016, he was promoted to Lead Analyst and put in charge of the newly created STF Analytics. His analysis is featured in almost the entire array of SubTel Forum publications.*

Interactive Cable Map UPDATES

T he SubTel Cable Map is built with the industry standard Esri ArcGIS platform and linked to the SubTel Forum Submarine Cable Database. It tracks the progress of some 300+ current and planned cable systems, 45+ cable ships, over 800 landing points, as well as mobile subscriptions and internet accessibility data for 254 countries. Systems are also linked to SubTel Forum's News Now Feed, allowing viewing of current and archived news details.

This interactive map is a continual work and progress and regularly updated with pertinent data captured by analysts at SubTel Forum and feedback from our users. Our goal is to make easily available not only data from the Submarine Cable Almanac, but also more and more new layers of system information.

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INTRO VIDEO HERE

Want to learn more about how to use the great features of the map? Take a look at our tutorial video series below:

1. Print Widget
2. General Map Usage
3. Group Filter Widget
4. Select Twool
5. Control Buttons
6. Share Widget
7. Data Centers
8. Cable Ships

We hope you continue to make use of the SubTel Cable Map in order to learn more about the industry yourself and educate others on the importance of submarine cable systems.

Please feel free to reach out to our Lead Analyst, Kieran Clark, should you have any comments, questions or updates at *kclark@subtelforum.com*. **STF**

SUBTELFORUM.COM/CABLEMAP
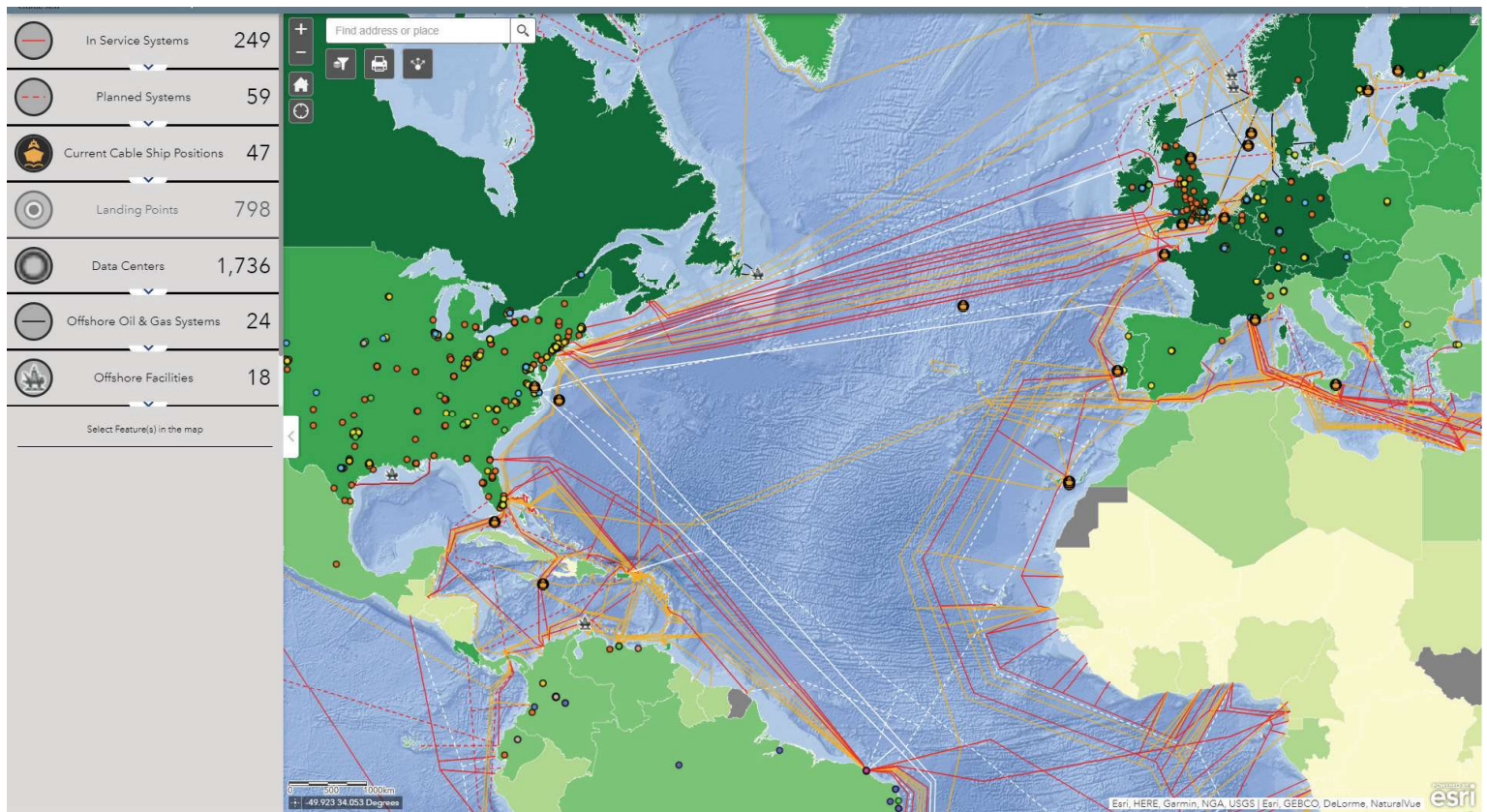
Since the last issue of the Magazine, the map has added 8 systems and updated an additional 34. The full list of updated systems are as follows:

JUNE 15TH, 2020
Systems Added
2Africa
Avassa
HAVTOR
MSC
Systems Updated
AAG
Crosslake Fibre
Dunant
MIST
Project Koete
Southern Cross Next

JULY 13TH, 2020
Systems Added
Asia Direct Cable
Dos Continentes I & II

COBRA Cable
BALOK
Systems Updated
2Africa
Alexandros
Alpal-2
Atlantis-2
BRUSA
Crosslake Fibre
Dunant
Englandcable
Estepona-Tetouan
GWEN
HKA
HK-G
JGA North
JGA South
Junior
MAREA

METISS
New Pacific
PCCS
RNAL
SAM-1
SAT-3
SEAK
SEA-US
Southern Cross NEXT
South Pacific Subsea Cable
SxS
Unisur