



# International Submarine Cable Trends

RIPE 66 Dublin

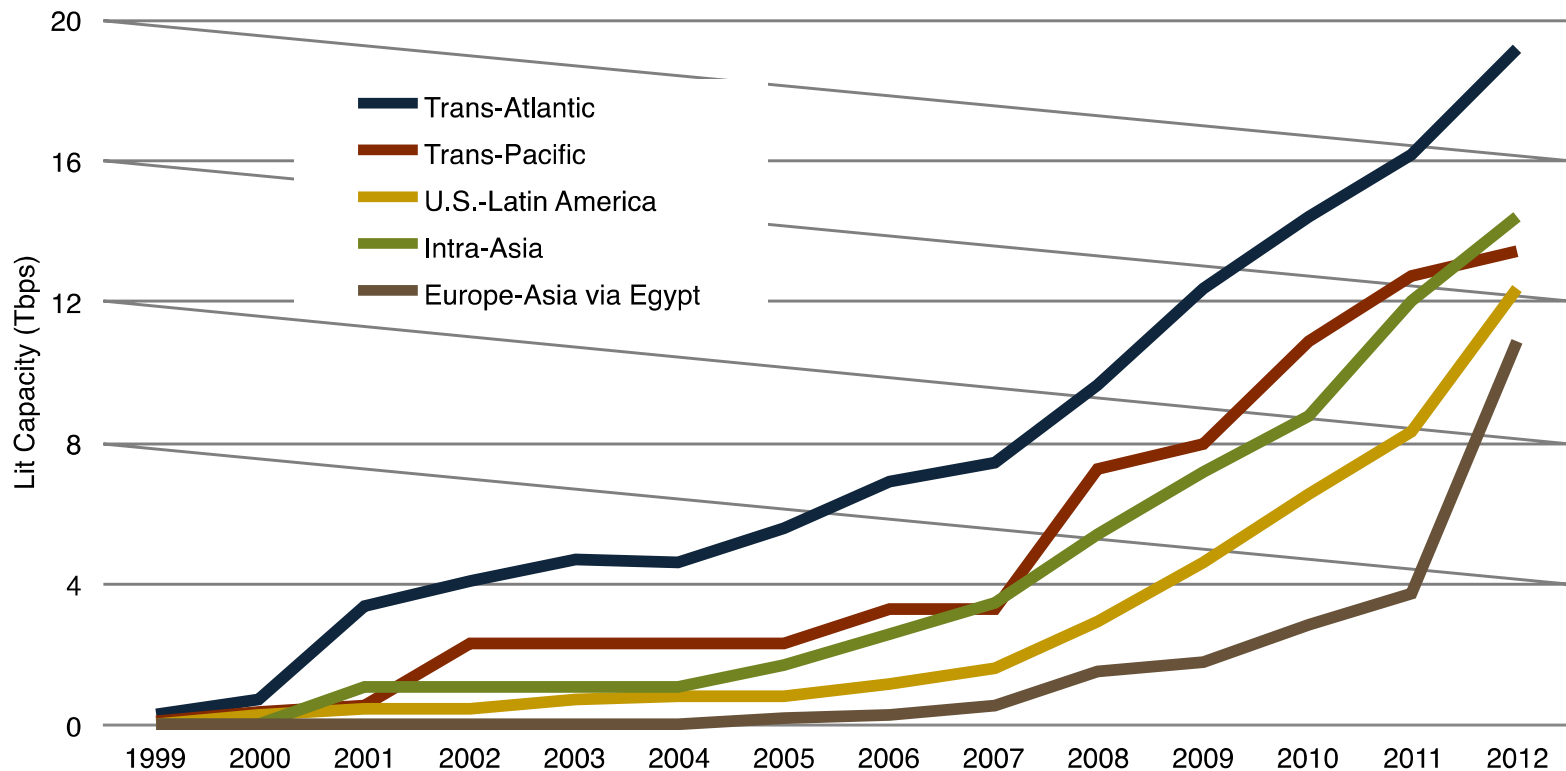
May 2013

# Overview

- Supply Growth and the Role of Technological Advances
- Transport Prices
- Review of New Cable Construction Activity

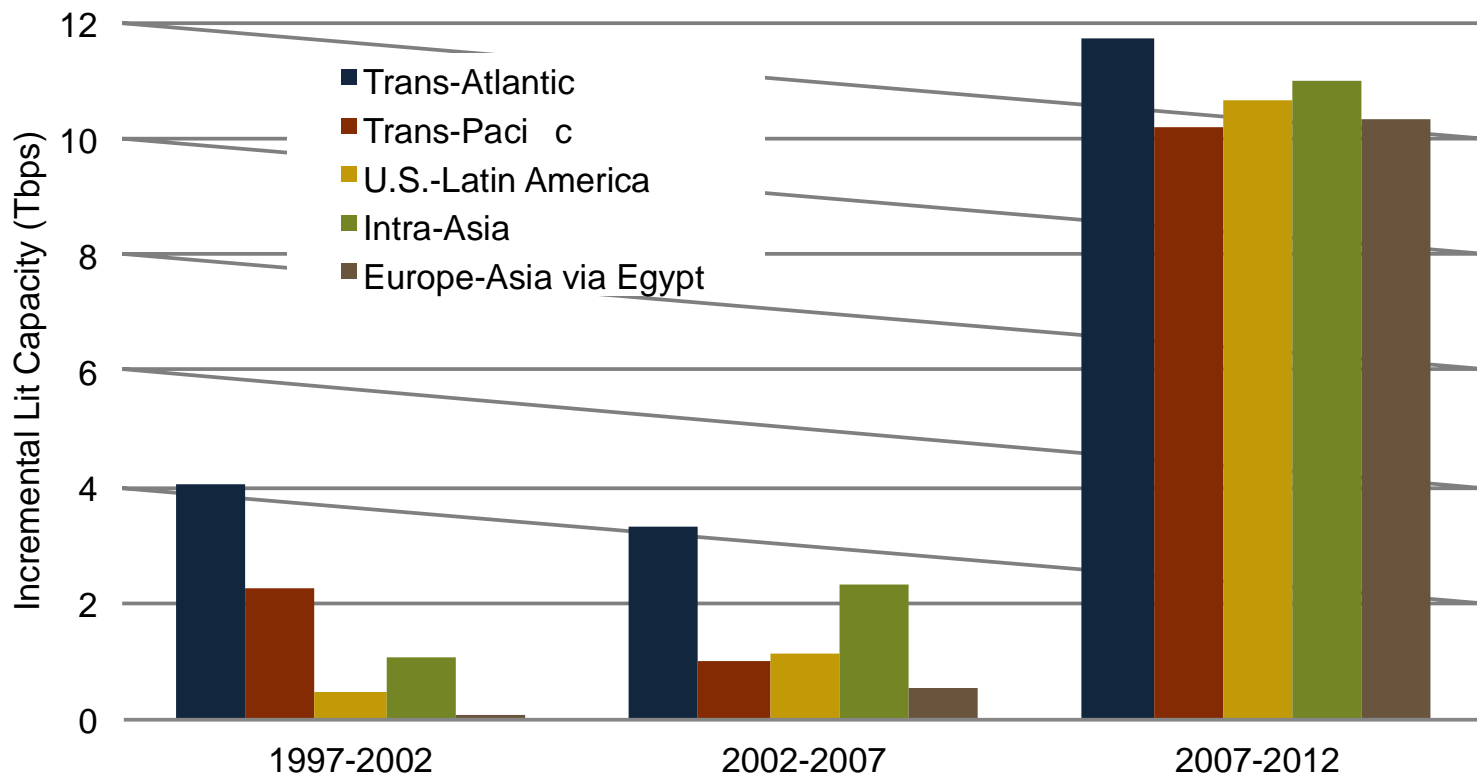
# Cable Capacity Surging

## Lit Capacity on Major Submarine Cable Routes, 1999-2012



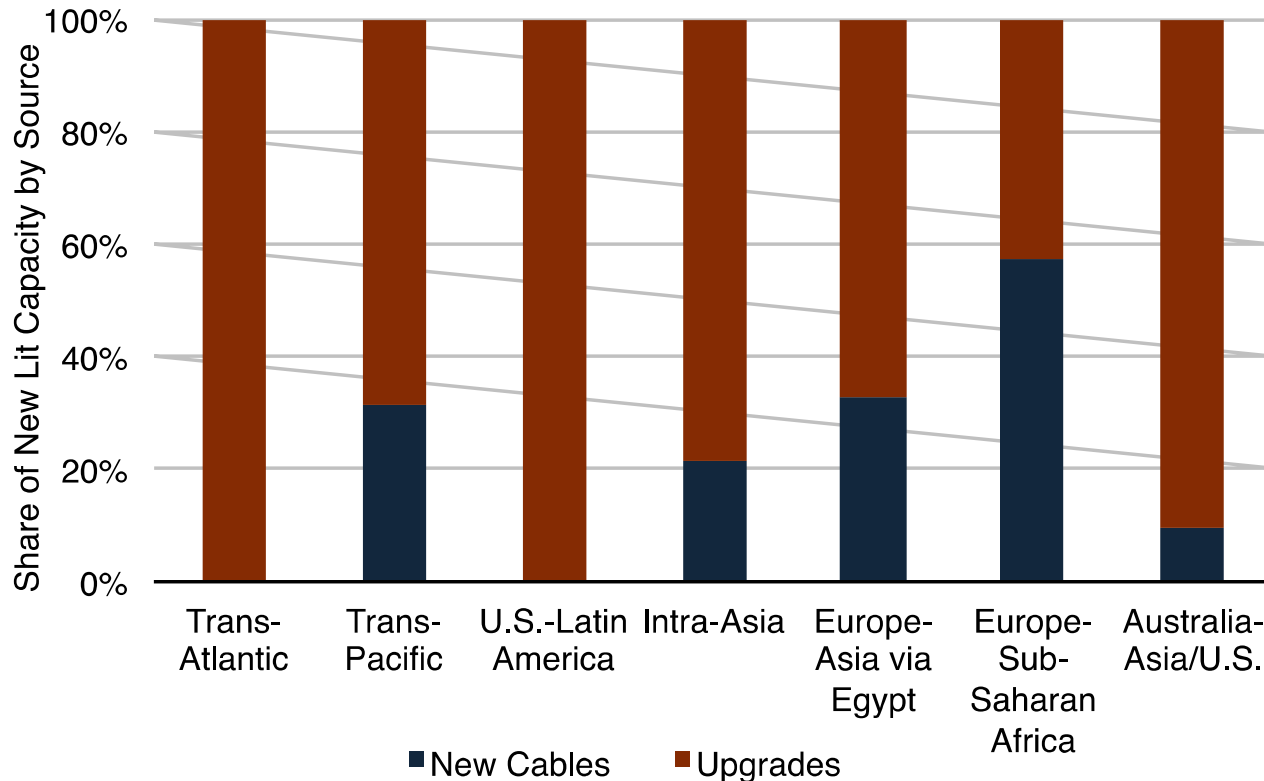
# Other Routes are Catching Up To the Atlantic

Incremental Lit Submarine Cable Capacity on Major Routes, 1997-2012



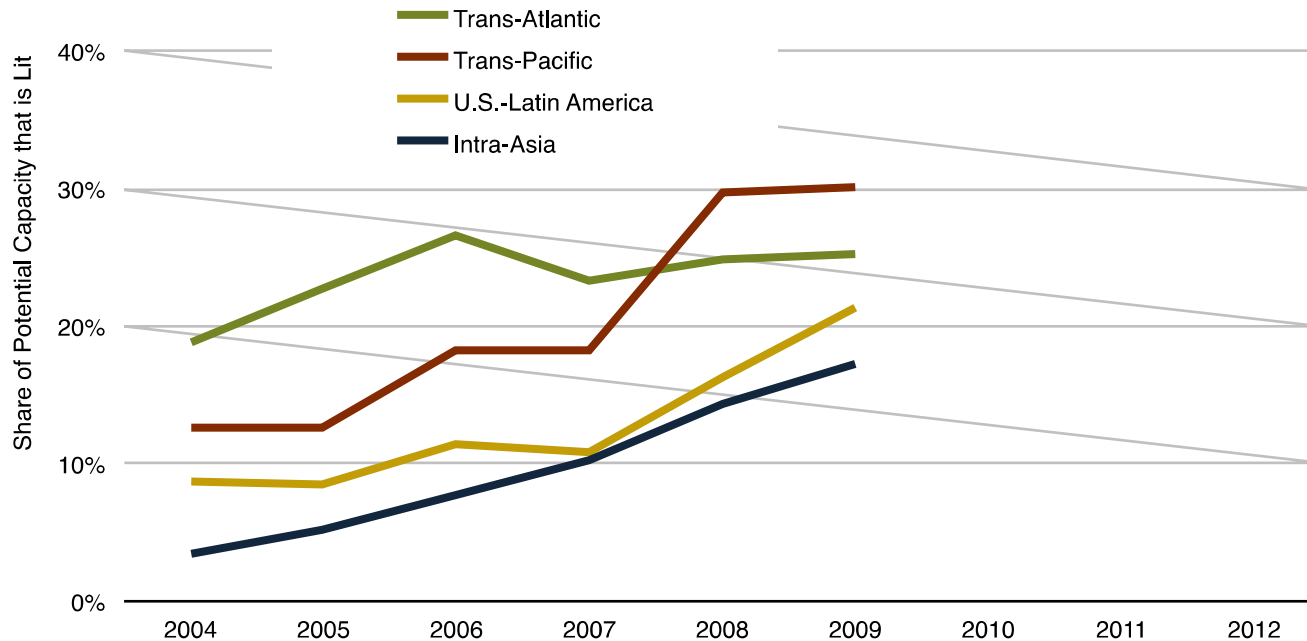
# Upgrades Addressing Most Demand Growth

Source of Lit Submarine Cable Capacity, 2008-2012



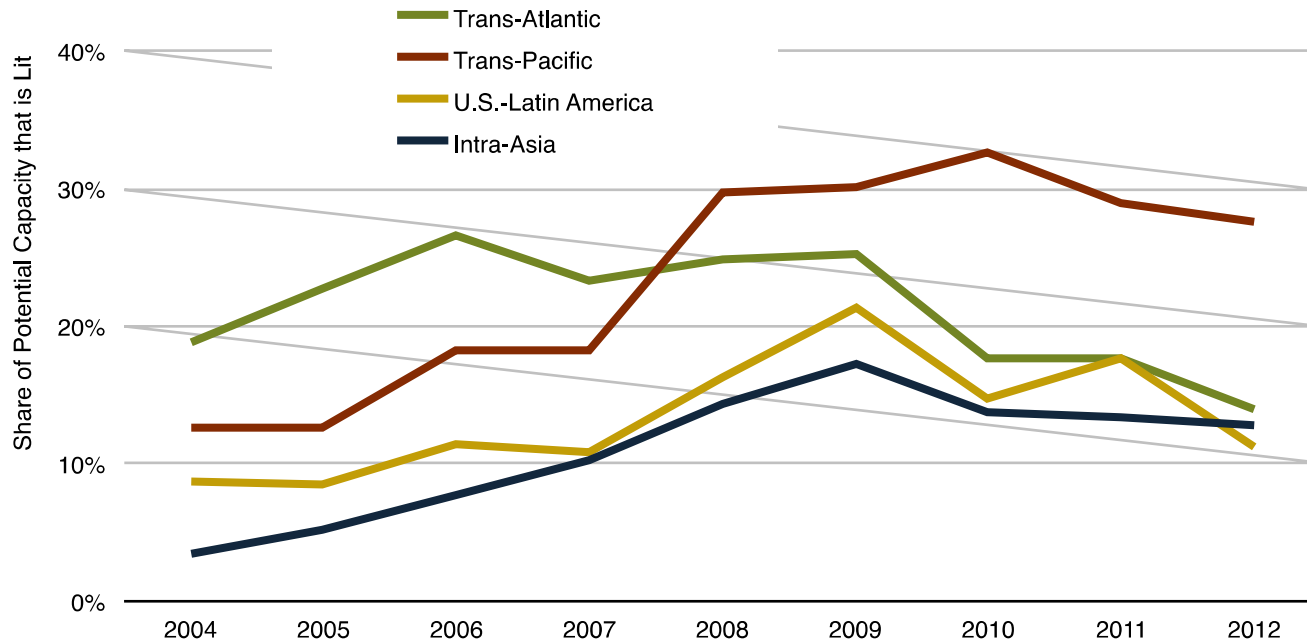
# Is a supply shortage looming?

## Share of Potential Capacity that is Lit, 2004-2012



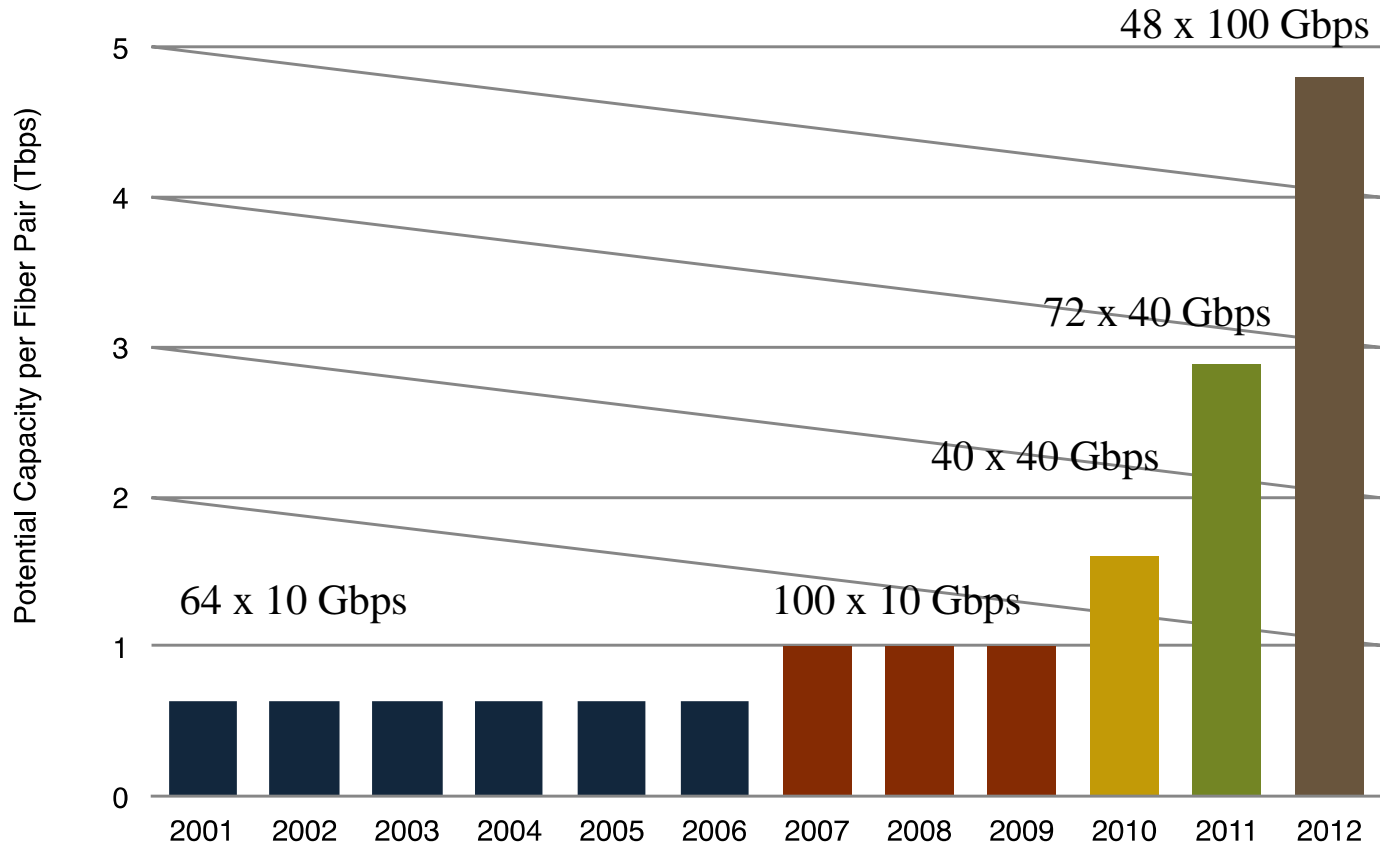
# Is a supply shortage looming?

## Share of Potential Capacity that is Lit, 2004-2012



# From 10 Gbps to 100 Gbps

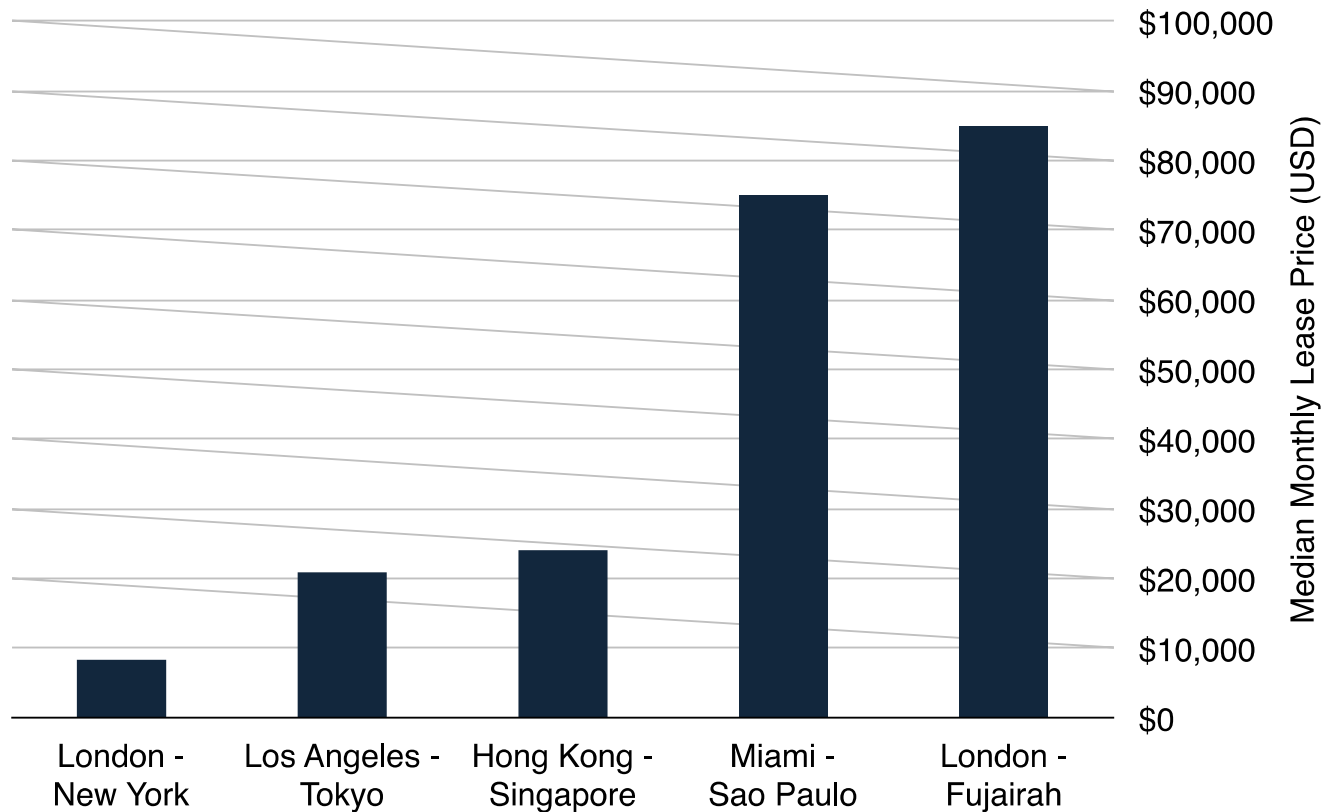
Potential Capacity per Fiber Pair on Tata TGN-Atlantic





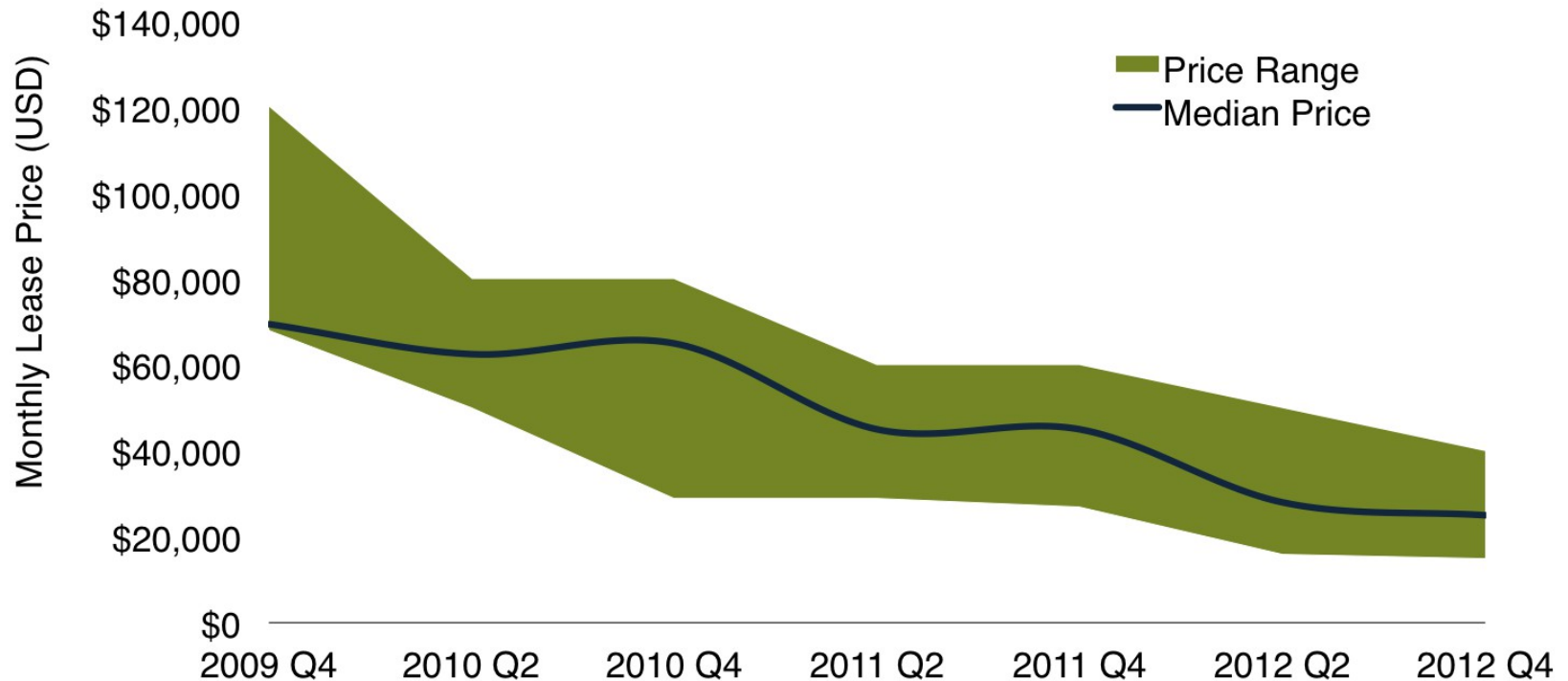
# Capacity is not Cheap Everywhere

Median Monthly 10 Gbps Lease Prices, Q4 2012



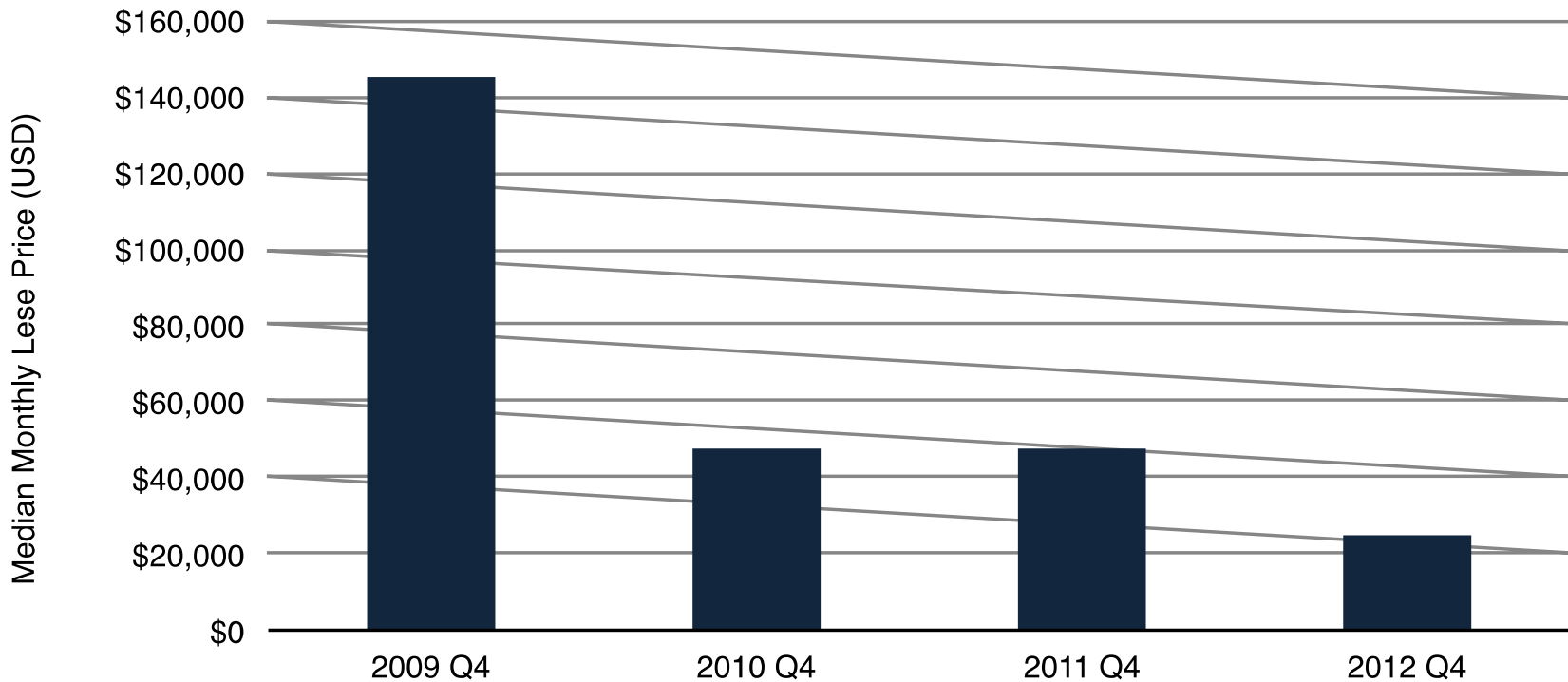
# Range of Prices Exist

Los Angeles-Tokyo 10 Gbps Price Range, Q4 2009-Q4 2012

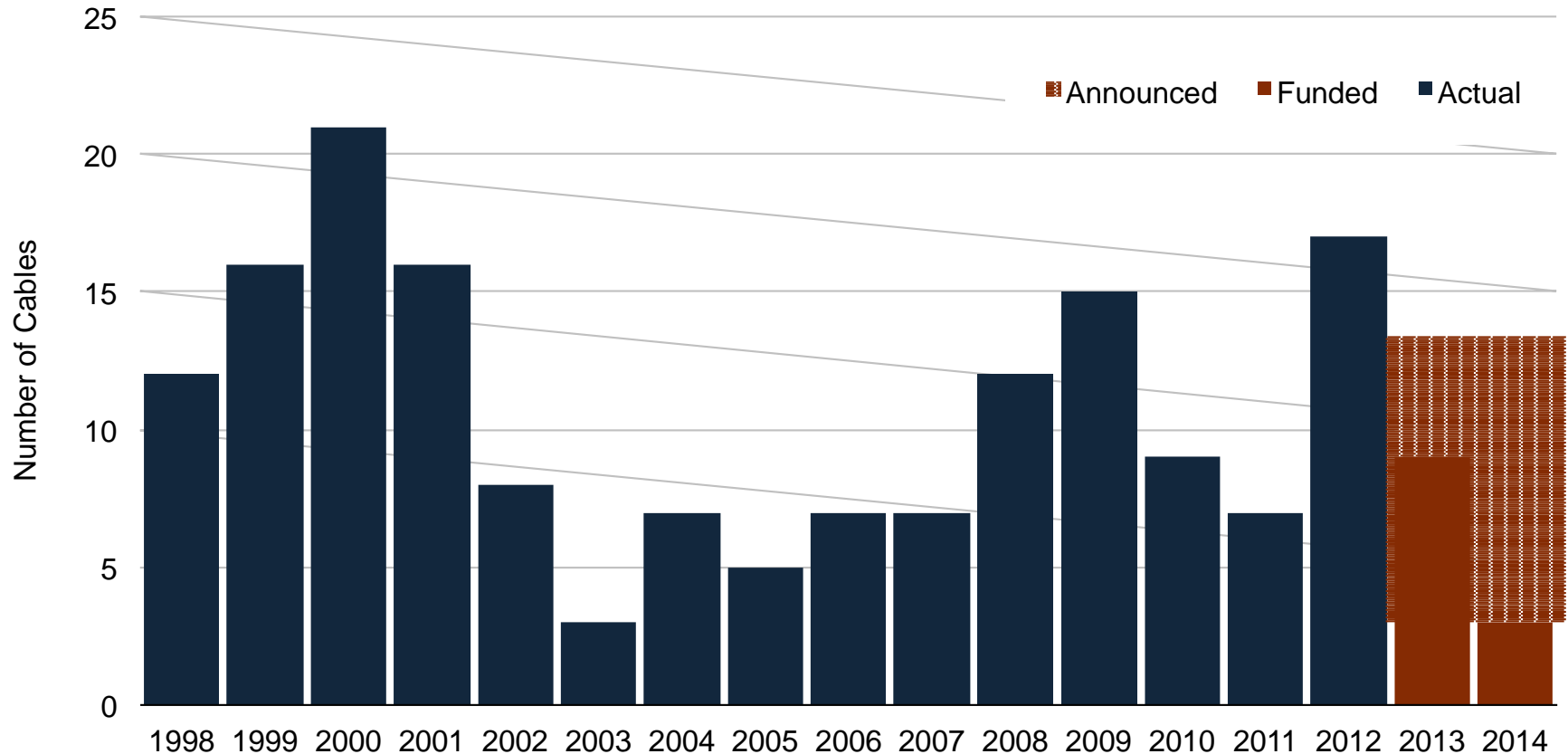


# More Cables, Lower Prices

London-Johannesburg STM-1 Lease Prices, Q4 2009-Q4 2012

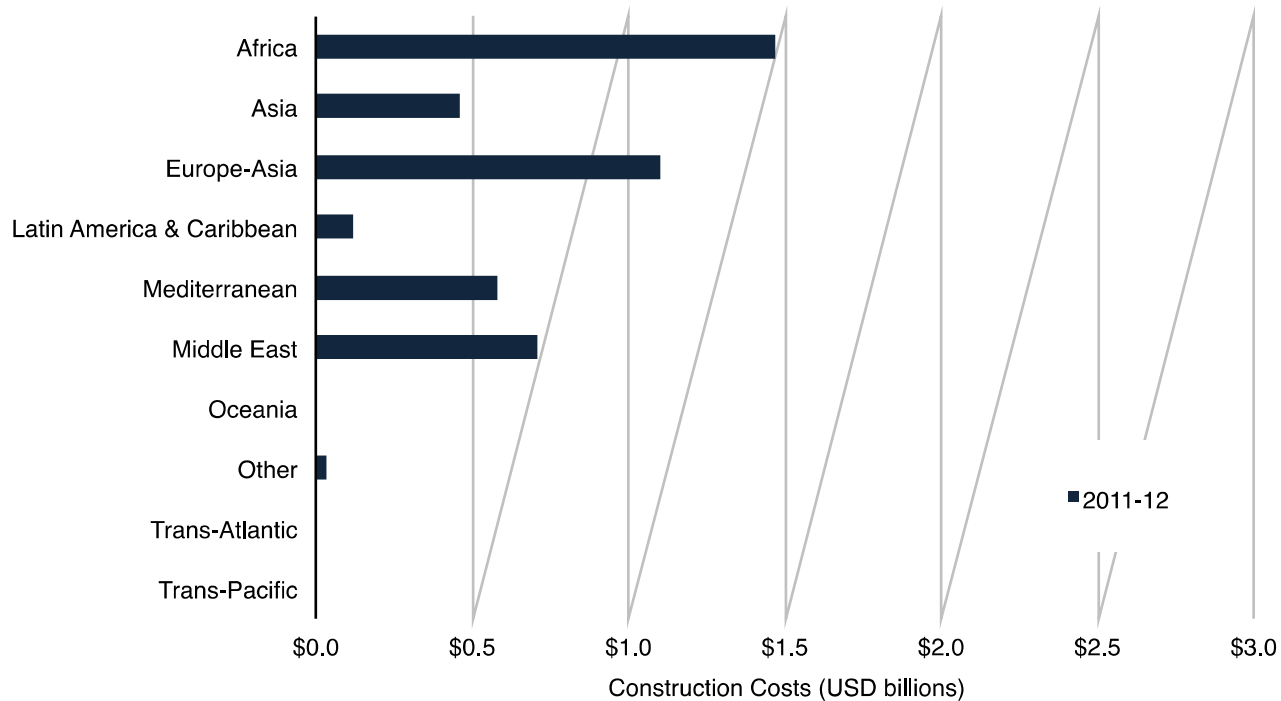


# More Cables on the Way! (Maybe)

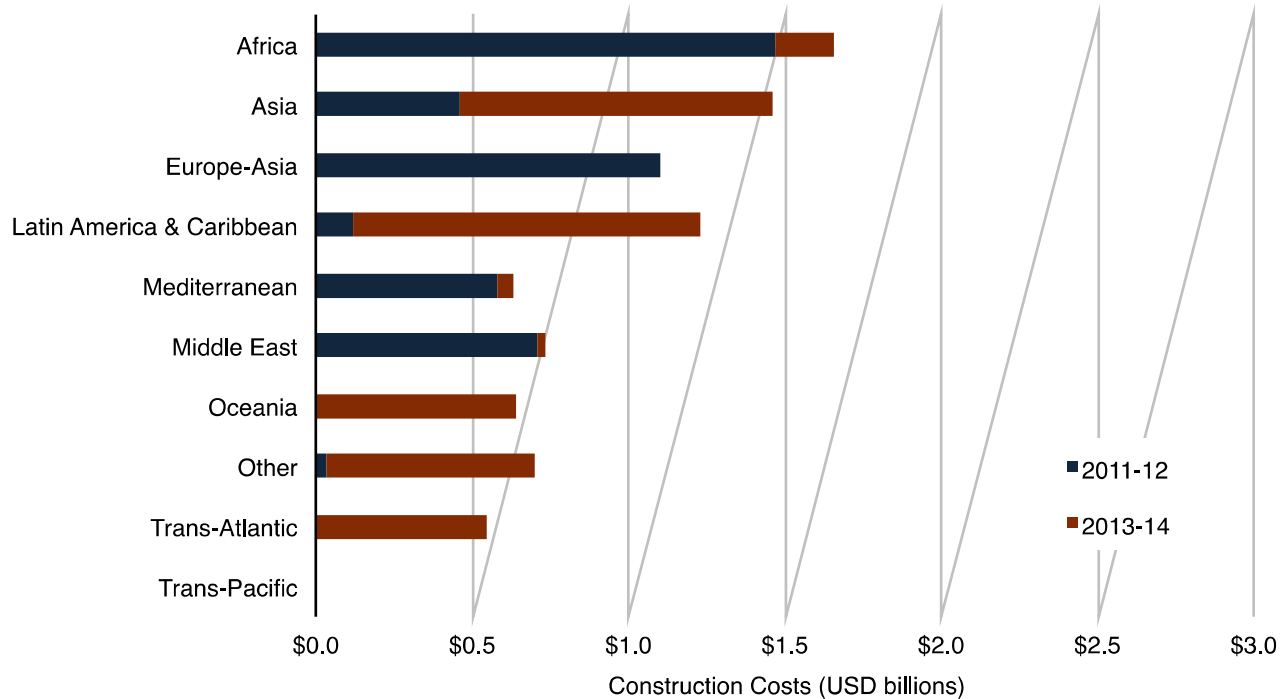


Notes: Number of new cables is based on the year that the cable entered service. Cables entering service in 2013 and 2014 are based on announced contracts and TeleGeography estimates.

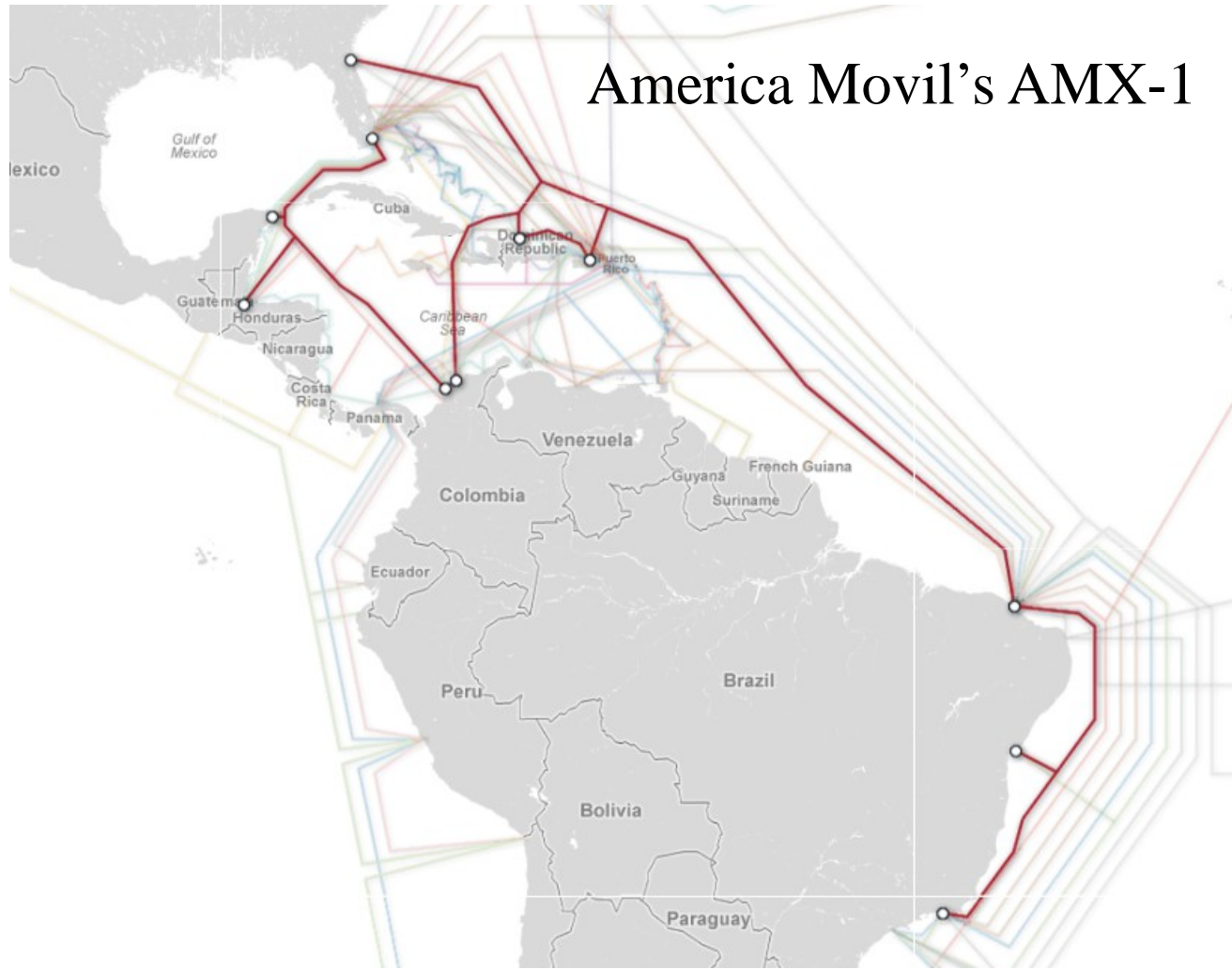
# Where's the New Cable Development?



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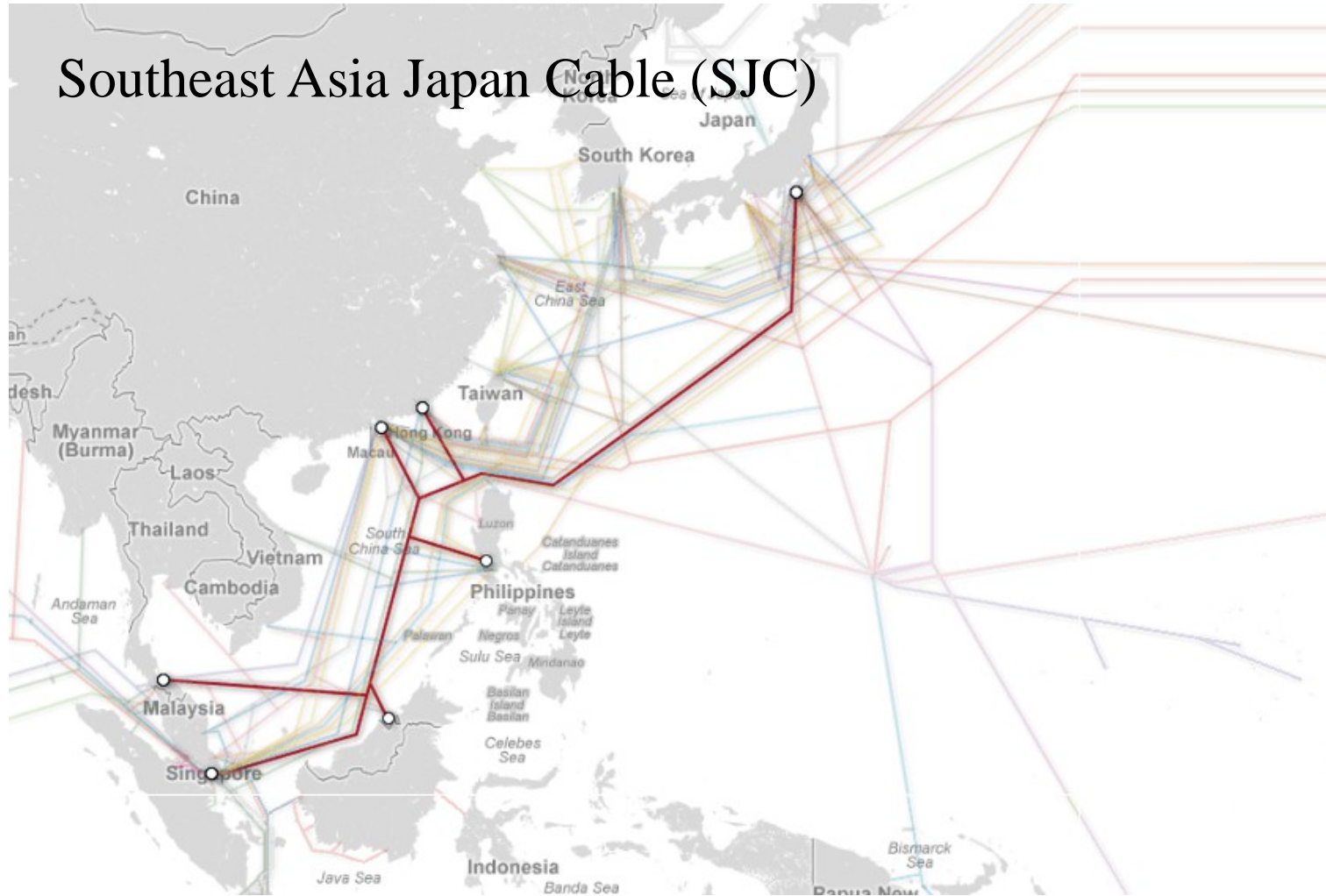


# New Cables Later this Year



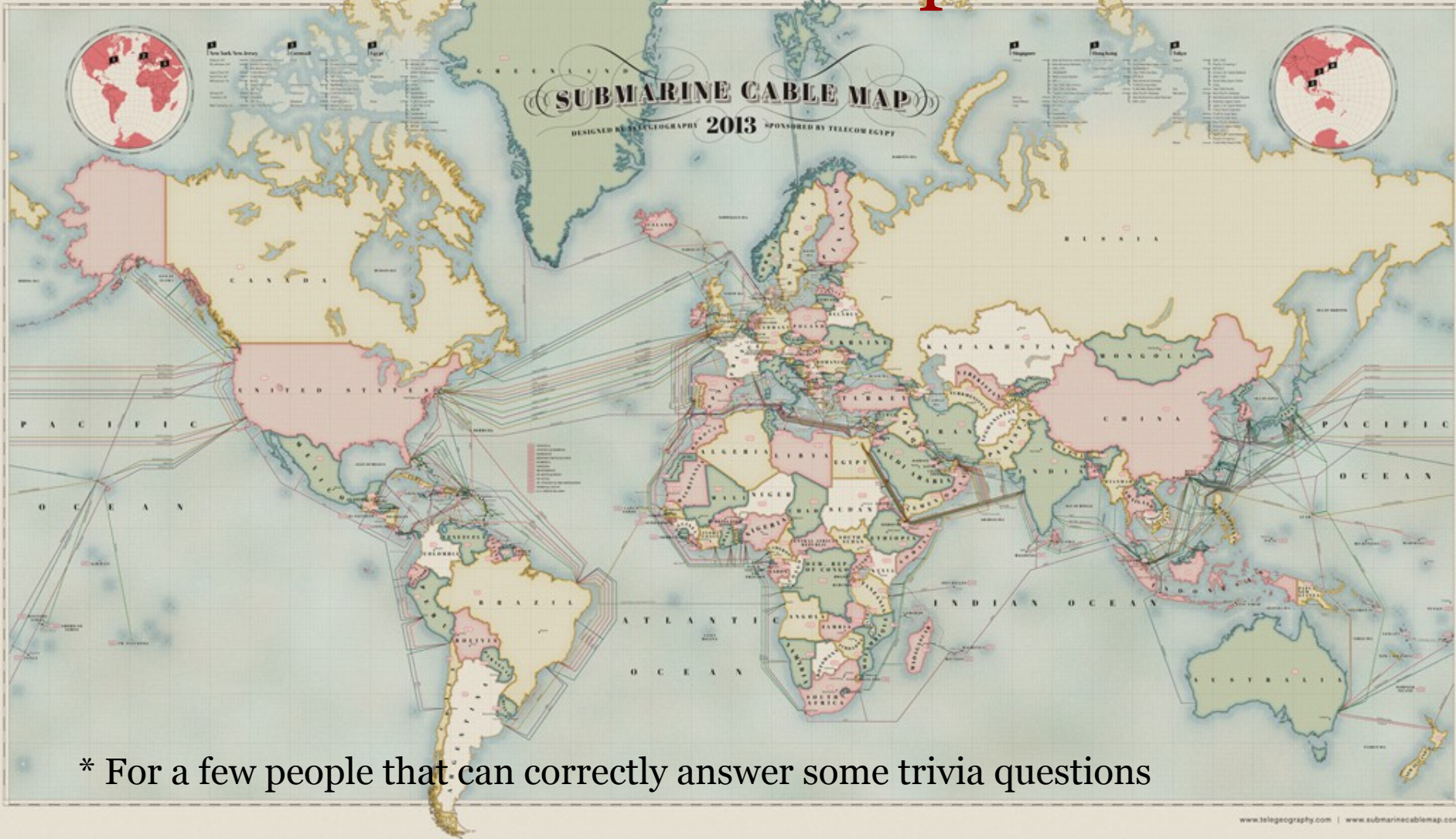
# New Cables Later this Year

## Southeast Asia Japan Cable (SJC)





# Free Cable Maps!\*



\* For a few people that can correctly answer some trivia questions

# What is the diameter of deep-sea cable most similar to?

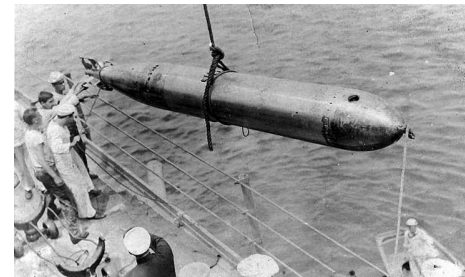
A. Pint of Guinness



B. Garden watering hose



C. WWII-era Torpedo



# How are cables loaded onto ships?

A. Mechanized Winch

B. Robotic Arm

C. Manually by a team of guys walking around in a circle

# Which of these is not a major cause of cable faults?

- A. Ships' Anchors
- B. Commercial Fishing
- C. These 3 guys



# Thank You

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