

THE GLOBAL SUBMARINE CABLE REVIEW 2019

Worldwide Projects and Challenges

0900-1015

LATAM Cable Project Update

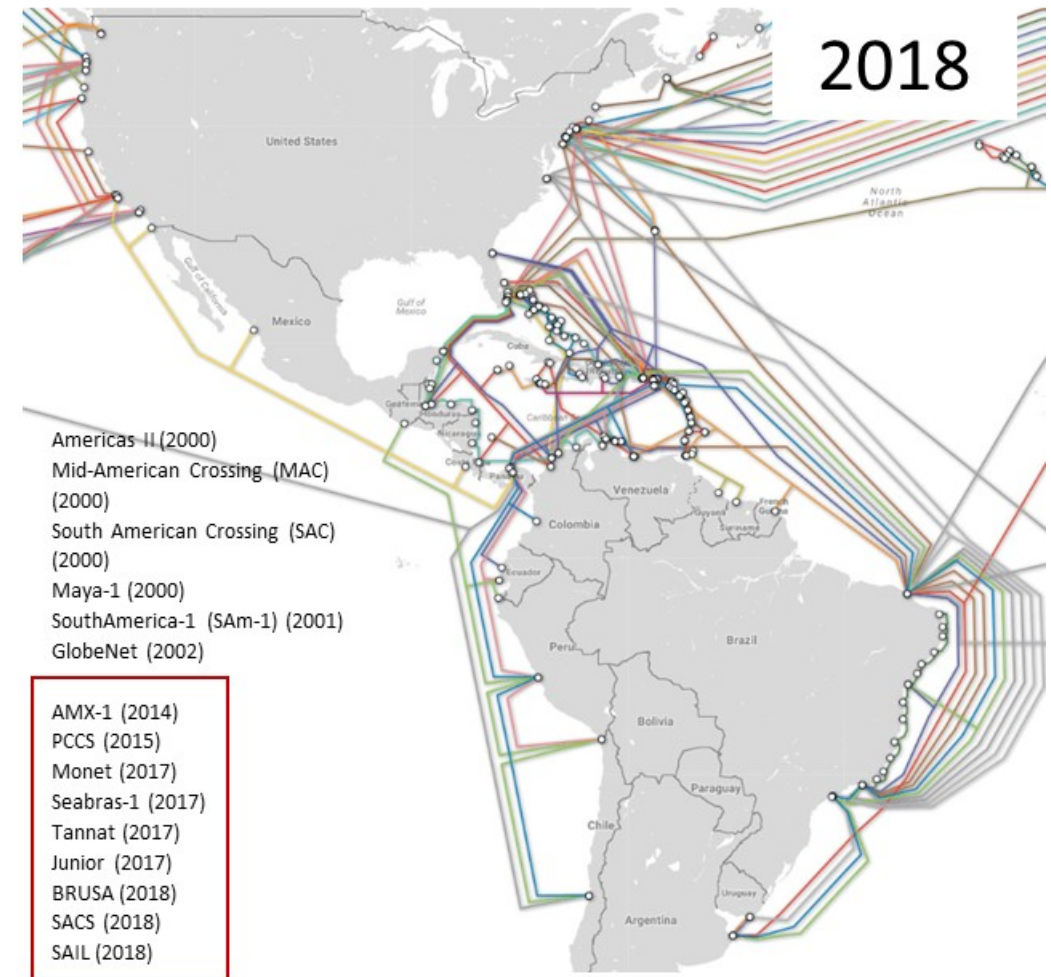
Where do we stand today?

Erick Contag,
Executive Chairman, Globenet



- 320Gbps per FP
- 2 – 4 FPs
- Ring Architecture
- Consortia
- Private Cables
- MIU = E1
- Carriers driving builds
- 15Tbps + per FP
- 6 – 8 FPs
- Linear Systems on diverse routes
- Joint Build Agreements & Partnerships
- Private Cables & Government Sponsored Systems
- MIU = Fiber Pair
- OTTs driving builds

LatAm Subsea Update:



LatAm Subsea Update: 2014 - 2018 New Builds

AMX-1
RFS: 2014



SEABRAS-1
RFS: Sep 2017



BRUSA
RFS: 2018



PCCS
RFS: 2015



MONET
RFS: Dec 2017



SACS
RFS: Q4 2018




SAIL
RFS: Q4 2018



TANNAT
RFS: H1 2018



JUNIOR
RFS: H2 2018



- First South Atlantic LatAm – Africa systems

LatAm Subsea Update: Looking Ahead



MALBEC
RFS: H1 2020

globenet
facebook.

Brazil - Argentina



TANNAT
RFS: H2 2020

antel **Google**

Extension to Argentina



CURIE
RFS: 2019

Google

Chile - Los Angeles



ARBR
RFS: H2 2020

Seaborn NETWORKS

Argentina - Brazil

LatAm Subsea Update: Looking Ahead (2)



Fibra Optica Austral
RFS: H2 2019

Chile Domestic



Prat
RFS: 2020



Chile Domestic



RFS: 2020



"Bolivia" - Peru



Deep Blue
RFS: 2021



Caribbean - US

LatAm Subsea Update: Connecting Continents



EllaLink
RFS: H2 2020



Brazil - Portugal



SABR
RFS: 2021



South Africa - Brazil



SAEx 1
RFS: 2021



South Africa - USA

Challenges, Opportunities, and other Trends of our Region:

- Geo-Political shift
- Permitting will continue to be challenging given Governments lost knowledgeable staff
- Int'l capacity demand will continue to grow with a CAGR of ~40%
- Price erosion will continue
- Late 90's and early 2000's systems will reach end of design life within the next 5 years or is it 10 years? What about economic life?
- Growth in terrestrial networks, data centers / Cloud; some regions with geographic / terrain challenges
- OTTs monetizing their assets through SWAPs on diverse routes
- Opportunity for a new Pacific-side cable, Caribbean system(s), and other regional system
- Deployment of regional Internet Exchange Points