GLOBAL LEADERS' FORUM

GLF™

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12 MONTHS | 1 INDUSTRY INITIATIVE
200,000+ KM OF FORECAST DEMAND IDENTIFIED

- Brought together the global subsea supply chain under a neutral GLF forum.
- Created the industry's first aggregated carrier subsea forecast.
- Provided vendors with greater visibility of future carrier demand.
- Enabled more informed capacity, manufacturing and deployment planning.
- Established a new model for industry collaboration on strategic infrastructure challenges.

Subsea cable delivery has become one of the defining challenges facing the global connectivity industry. Rising demand, geopolitical uncertainty, regulatory complexity and the limited availability of specialist manufacturing and installation capacity have combined to create significant delivery constraints, delaying critical infrastructure projects and impacting connectivity worldwide.

Recognising that no single organisation could solve this challenge alone, the Global Leaders Forum (GLF) has, over the past 12 months, brought together the vendors, and the carrier community, to identify practical, collaborative solutions that strengthen the resilience of the global supply chain.

Through open dialogue, the GLF identified a fundamental gap in how carrier demand is communicated to the supply chain. As the providers of global connectivity for businesses, governments, operators, content providers and countless other users, carriers support a broad and diverse ecosystem of demand. This makes forecasting significantly more complex, yet no less critical. Without improved visibility into carrier requirements, there is a real risk that constrained manufacturing and installation capacity becomes disproportionately allocated, leaving important connectivity needs underserved.

To address this, participating carriers through the GLF provided forward-looking project forecasts. Individual data circulated among participating carriers was aggregated, anonymised and consolidated into a single long-term industry forecast before being shared with participating vendors. Collectively, participating GLF carriers identified demand for more than 200,000 kilometres of future subsea cable infrastructure, demonstrating the significant role carriers continue to play in driving global subsea investment alongside hyperscalers.

Through the trust of the community and the GLF's neutral convening role, the sector provides vendors with a clearer understanding of future carrier demand, enabling better production planning, more efficient resource allocation and greater flexibility in delivering critical subsea infrastructure. At a time when supply chain capacity remains constrained, greater visibility benefits not only vendors but the wider digital ecosystem that depends upon resilient international connectivity.

Achieving this milestone reflects the willingness of carriers to work for the benefit of the broader ecosystem and highlights the value of trusted, neutral industry forums in enabling meaningful progress.

The GLF would like to thank all participating carriers, vendors and industry partners whose openness, expertise and commitment made this initiative possible. Their contributions have laid the foundations for a more informed and coordinated approach to subsea infrastructure planning.

Looking ahead, by maintaining regular engagement, sharing forward-looking insights responsibly and building on the trust established through this initiative, the industry can strengthen planning confidence, support long-term investment decisions and create a more coordinated approach to delivering the subsea capacity needed to support future global connectivity.

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