



A data center without fiber is a warehouse

How data center and fiber operators can connect the upcoming wave of facilities

Executive Summary



The power requirements of AI-ready data center builds are enormous, and the requirements are only going to get bigger - the International Energy Agency estimates that by 2030, the combined power draw of the world's data centers will equal that of the entire country of Japan.

This has brought about a 'power first' mindset among data center builders, who are prioritizing keeping the servers lit above anything else. But the other component of successfully connecting a data center - fiber - should not be pushed down the order. With more and more hyperscale projects being built in relatively greenfield zones for data centers, it is not a given that long-haul fiber will be available to fit the project timelines. This is gaining more and more attention among the people financing, building, and using the new generation of hyperscale-level data centers - especially with stringent performance SLAs meaning that a single fiber routing is usually not enough.

There are various options on the table for ensuring data centers have sufficient fiber capacity - but each comes with challenges:

One is to build in areas with existing trunk routes and metro rings, taking advantage of a well-developed infrastructure - but this usually means paying a premium for land and waiting in a queue for power. Another is to choose the data center site, then work on securing the fiber - but this often means long lead times, especially if the build is happening in a geologically challenging area. And a third option is to build strategic, long-term partnerships between data center builders and fiber providers. This benefits both parties and gives much-needed foresight to project planning that can run into decades, but making it happen requires years of relationship-building and a joinedup strategy across the planning process.

Whichever option it is, it is becoming clear that in the rush to secure power, relegating fiber connections to an afterthought is not the way forward. This guide, produced with the help of the industry experts taking part in the Metro Connect event in Fort Lauderdale every year, will: Highlight the current situation in providing fiber connectivity to data centers Give detailed project profiles of specific data center and fiber builds using various strategies for securing fiber Examine some of the specific challenges of running fiber to data centers

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Don't forget about fiber



The race for power has overturned decades of conventional data center planning, and fiber networks are now being forced to follow. For years, developers prioritized proximity to dense fiber corridors, subsea landing points, and established network ecosystems. Today, the first question has changed: where is the power, and how quickly can I get it to my data center?

This pivot is reshaping the map of digital infrastructure. In the United States, transmission-rich regions such as Texas are attracting hyperscale and AI-led builds despite limited fiber adjacency. The result is a fundamental inversion of the traditional model: rather than fiber dictating location, fiber is now a secondary deployment that must chase the megawatts.

The trend is not isolated to the US. Markets with access to abundant, lower-cost energy are rapidly emerging as global data center contenders. Brazil, for example, has seen a surge of development around São Paulo and Fortaleza due to grid availability, backed by long-haul fiber investment and subsea connectivity from the US, Europe, and Africa. Similar dynamics are playing out in Iceland and Norway, where renewable-powered facilities are gaining traction and driving new international fiber interest.

For fiber builders and investors, this shift introduces both opportunity and complexity. New power-proximate sites often sit far outside traditional metro rings, demanding longer routes, higher capital outlay, and more diverse stakeholder alignment, from utilities and municipalities to private landowners, state regulators, and government agencies. At the same time, the competitive advantage for early movers is significant: securing routes early into power-led data center clusters can lock in anchor tenants and multi-decade revenue streams.

“

It used to be the decision was made, 'Hey, I need to be somewhat near a fiber footprint.' Now it's 'Where's the power?' And then everyone else has to figure out how to get to me from there.

A.J. Moul, Frontier Communications, speaking at Metro Fall 2025

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Fiber to data centers: at a glance



45%

Share of global data centers located in the United States (WEF)



4

Typical number of diverse fiber routes required for a hyperscale data center



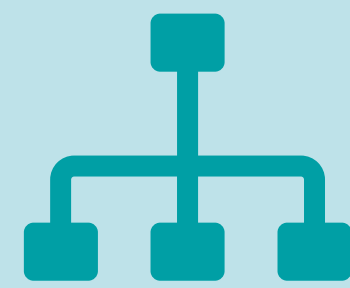
10m

Additional homes passed by US long-haul fiber each year



48%

of survey respondents cite power as the priority for ontime DC project delivery (source)



3

Years it can take to deliver fiber routes to emerging data center clusters



\$60k

US long-haul fiber construction cost per mile (estimate)



Deep dive: how are new data center builds driving fiber deployments?

Data centers are expanding at breakneck speed, and fiber networks are racing to keep up, a panel discussed at Metro Connect 2025 in Fort Lauderdale. Report by Saf Malik for Capacity.

Power first, fiber second

Gone are the days of data centers choosing locations based on fiber access, with the panel of experts instead suggesting new projects are instead asking, “Where’s the power?” Arnab Ghosal, VP and COO at Southern Telecom, revealed the company has 50,000 megawatts in its queue. While not all of that will come to fruition, Ghosal said that Southern foresees around 10,000 megawatts of legit load in the next five years. “That’s as large as we’ve ever seen it,” he said, adding that data centers aren’t just looking at metro type cities; instead, he said operators will “site wherever there’s energy, and then you chase it with fiber on top of that.”

He added that while full infrastructure builds can take up to five years, partial loads, such as an initial 50 megawatts, may be available sooner, depending on ramp-up needs and location. A.J. Moul, VP of wholesale at Frontier Communications, said the demand is just coming from hyperscalers, but it’s now the mid-tier facilities who are chasing the power.



“The onus on fiber providers is trying to figure out where those data centers are going, and how do we get our facility out there? Because a data center doesn’t just want one provider, they’re going to want multiple providers, a minimum of four entrances, four unique routes to the nearest metros.”

Moul noted that renewable energy, while important, often isn’t feasible for the scale data centers now demand.

“You can’t cost effectively generate 500 megawatts of power from solar or wind,” he said. “The closest thing that we’ve seen has been Quincy, where you’re using hydroelectric to power the data centres.”

Rural is the new frontier

Where once Northern Virginia and its ‘Data Center Alley’ ruled supreme in terms of attracting new facilities, the panel spoke of how rural regions in Montana, North Dakota, and Alabama are increasingly becoming the new hot zones for data center construction.

As a result, the shift to these emerging rural markets is creating demand for long-haul fiber builds stretching for hundreds of miles. Dan Davis, CEO and founder of Arcadian, which builds long-haul fiber routes, said firms like his need to “think farther ahead” and keep on top of the power side to keep track of where new data center projects may go next. That’s because power, not connectivity, is now the primary constraint. In Davis’ words, data centers need two things: “photons and electrons” – and they’ll go where the electrons are. In many cases, fiber then has to follow, turning what was once a 25-mile metro build into a multi-year, multi-state infrastructure challenge.



Funding Fiber: Who foots the bill?

The data center and fiber markets have evolved, but so too has the investment model, with a mix of government middle-mile funding, private equity, alternative business structures, and customer anchor tenants now de-risking multi-year builds.

Davis suggested the capital intensity has risen to such a point that the industry needs to “get smarter” about multiple infrastructure builds at the same time. Bringing together the relevant parties may not be so easy, as Davis explained: “If you think about the investment community, your energy infrastructure investor is an entirely different group, both on the banking side and the capital side, from your digital infrastructure investor, and yet you’re trying to align two different groups throughout our whole ecosystem at the same time. That’s probably one reason why it hasn’t happened yet.”

The panel discussed the importance of managing two very different phases of risk: the long, high-risk development period and the larger, lower-risk capital required once permitting and anchor customers are in place. Davis described this early phase as “high-risk dollars,” development work that can span years while only spending 3-4% of the overall project cost.

Frontier’s Moul pointed out that the sheer scale and cost of new builds has pushed timelines further out, with investors and operators increasingly looking at 10-, 20-, or even 30-year horizons. Yes, you need an anchor tenant,” he said. “But that’s not all you need because a lot of times that anchor tenant is going to want the whole facility.” For Southern Telecom, the business case often comes from the ability to layer value across multiple domains. “We’re building fiber for the electric grid to operate,” said Ghosal. “But if you can do that and get data center service, and then rural broadband, that’s three different business cases. Now you’re stacking, and now you’re maximising capital.



Permitting: The hidden headache

While fiber and power may be the pillars of data center development, permitting is the bottleneck the panel suggests can quietly derail entire projects. Arcadian's Davis shared that a recent 693 mile route between Salt Lake City and Phoenix required 74 separate permit processes. He explained: "Two states, an independent sovereign Native American nation, five municipalities, six counties, Bureau of Indian Affairs (BIA), Bureau of Land Management (BLM), Department of Defence (DoD), National Park, National Forest... and a partridge in a pear tree," he joked, emphasizing the Kafkaesque complexity involved.

In addition, when builds extend into rural regions not yet covered by a data center, the permitting landscape becomes even more fragmented and unpredictable. Unlike urban environments where infrastructure corridors already exist, rural routes often require negotiations from scratch, crossing federal land, tribal territories, and multiple jurisdictions. Southern Telecom's Ghosal noted that creative legislation is beginning to ease the burden in some states. He referenced that in Alabama, recent law changes allow existing transmission rights-of-way to also carry broadband infrastructure, a change he said has unlocked faster fiber deployments on utility corridors.

The panellists agreed that permitting remains one of the highest-risk and most time-consuming parts of the fiber build cycle. "Every time you add one more variable, it's not just a plus one in terms of time and risk — it's almost logarithmic in complexity," Davis added.

Rethinking the edge



As hyperscalers build out massive AI training facilities, the conversation is beginning to shift to inference and what kind of infrastructure that shift will require. Davis of Arcadian said the architecture required for AI is still unknown: "Maybe the models don't need to be quite as big as we thought," he noted. "They're massive 500 megawatt, gigawatt data centers to build [an AI] model. Then maybe a five or six of those strung around the US... maybe it's 20 smaller data centers." Frontier's Moul suggested AI might follow the path of cloud computing, where large centralized deployments eventually gave way to more distributed infrastructure. "Edge computing became more important because it needed to deliver at low latency to more and more people in different remote locations," he said. "I think AI is going to follow a similar trend." Ghosal agreed that while efficiency gains may come, they're likely to be absorbed by demand, noting: "They'll take that efficiency just to compute more."

Bringing fibre to data centres: 3 main challenges



Permitting

A fiber route passes through a lot of jurisdictions - not just administrative regions, but also land under the control of federal and local bodies and government agencies. This means managing the permitting process can be extremely challenging, and hard to sync up with data center builds which typically require far fewer permits. Arcadian's Salt Lake City- Phoenix route required 74 separate permits across its route, roughly one permit for every nine miles of fiber: "Two states, an independent sovereign Native American nation, five municipalities, six counties, Bureau of Indian Affairs (BIA), Bureau of Land Management (BLM), Department of Defence (DoD), National Park, National Forest... and a partridge in a pear tree," describes CEO Dan Davis.

Resilience and diversity

There is no exact number of different fiber routes required to ensure sufficient uptime for data centers, but the general consensus is at least 4. This requires very careful site selection and working with different fiber providers to secure not just the long haul transportation but the actual entry into the data center building itself. The upshot of this is that data center providers need a full understanding of the fiber landscape around where they plan to locate the facility, to then plan whether bespoke connectivity will be needed before the data center can begin operation.

Cable management

The job of hooking up a data center does not stop at the meet-me room. Poor cable management is not just an operational mess, it can lead to power inefficiencies due to overheating if cables are not laid out properly, for example. Keeping cables clean and straight, labelling them, and removing any cabling not in use can add significant efficiency to a data centre's operations, and with it running costs and profitability. Even something as basic as not letting cables get caught in cabinet doors and having an effective rodent management policy can make a difference.

Market profiles: 3 fast-growing data center markets

By far the largest data center market in the world, there is room for plenty of regional specifics in the U.S. market.

Away from the well-covered hotspots of Virginia and others, there are areas that are growing at a particularly fast clip that fiber providers need to be aware of potential demand for - here are profiles of three of them.



Louisiana

Louisiana's data-center footprint remains relatively modest compared with major U.S. hubs, but 2024–2025 developments are rapidly reshaping the landscape.

The shift to hyperscale begins in earnest in December 2024, when Meta confirmed plans for a massive AI-optimized data-center campus in Richland Parish. The \$10bn development will deliver a 4 million sq ft facility on a 2,250-acre megasite. Meta expects the facility to generate around 500 permanent jobs and up to 5,000 construction jobs at peak, with extensive fiber connections required to bring the site operational.

Additionally, a major new project by Hut 8 Mining in West Feliciana Parish approved in January 2025 marks another leap, with a planned US\$2.5 billion investment including two 450,000 sq ft buildings, for eventual occupancy by high-compute/AI workloads.

To accelerate such growth, Louisiana has introduced favorable incentives: a new statewide tax-rebate package (effective July 2024) aims to reduce upfront equipment and infrastructure costs for certified data-center operators, contingent on job creation and investment thresholds.

Image via Meta



Texas

Texas is among the United States' largest and fastest-growing data-center states: the Dallas–Fort Worth (DFW) region alone accounts for hundreds of megawatts of commissioned and under-construction capacity, and hundreds of megawatts of capacity are coming on stream in the Lone Star State as a whole.

Texas as a whole hosts around 300 data centers, with DFW, Austin, San Antonio and Houston the principal clusters. Rapid hyperscaler and AI demand has driven record construction, with Dallas-Fort Worth in the top five data center markets for new builds. Texas is particularly strong in the secondary market - according to CBRE's 2024 statistics, Austin/San Antonio and Houston are the second and third-largest data center markets in the country for secondary activity, with Denver in sixth position.

Power, so often a hurdle for DC builds, is an issue in Texas too due to the sheer number of builds coming on stream. Not only is the state both a fossil fuel and renewable powerhouse, it runs its own grid (ERCOT) that is independent of the wider U.S. system. This means transmission line construction times are some of the quickest in the country. But even this favourable setup cannot cope with the sheer number of data centers wanting to take power – an issue exacerbated by the fact that companies looking for new power lines must prove the need for energy and demand before getting them, a process that can take five years or more.



Atlanta

Atlanta is hardly an up-and-coming market, but the pace of its growth in 2024 took the industry by surprise.

The city added over 700MW of net absorption in 2024, according to CBRE's statistics - a 39-fold increase in the previous year and the first time in history a market has posted a higher net take-up figure than northern Virginia. The growth has propelled Atlanta to second place nationally in terms of occupied megawattage. As of March 2025 there was a further 2GW of space under construction, primarily driven by GPUaaS demand and an \$11bn investment from AWS, among many other deals coming on stream. In 2025 so far, activity has continued in the city, primarily driven by neocloud builds.

However, the state's power generation authority, Georgia Power, is adding more conditions to power usage by the state's data centers - even though out of a recent bid for 10GW of additional generation capacity, 80% is specifically earmarked for data centers (source).



Case studies: how three data center fiber projects came together



There are several ways to go about securing fiber for data center developments, and each comes with its own challenges and operational priorities.

Here, we profile three projects from around the U.S. where data center and fiber companies are working together to adapt to the requirements of a power-first market - delivering reliable, high capacity fibre to the new generation of AI data centers.



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Arcadian Infracom, Phoenix to Salt Lake City



[Arcadian Infracom](#), a fibreco focused on the southwestern United States, is developing a long-haul dark-fiber system between Phoenix and Salt Lake City that is noteworthy not just for its future role in supporting cloud and data center growth, but for the extensive permitting, negotiation and jurisdictional coordination required to make it feasible.

The route, which is currently in pre-construction, introduces much-needed diversity and capacity between the two cities. They currently lack a diverse longhaul fibre connection - existing routes make quite a substantial diversion to Las Vegas in the west - but with accelerated hyperscale investment due to power availability, land supply and favourable environmental profiles, there is strong demand for new infrastructure.

The project's progress to date has hinged on navigating one of the most complex regulatory landscapes in any current U.S. fiber build. As well as passing through multiple jurisdictions and administrative areas such as national parks, government-owned defense land, and a plethora of municipalities, the proposed route also traverses the lands of the Navajo Nation, adding an additional component to getting the build done. After negotiations and relationship-building, in 2022 Arcadian secured a long-term easement from the Bureau of Indian Affairs (BIA) to construct the backbone across Navajo Nation territory. This agreement established the legal foundation for the build, including a revenue-sharing component and commitments from Arcadian to provide dark fiber and lit services to the Nation. Securing this approval required sustained engagement with the Navajo Nation Council, Bureau of Indian Affairs processes and multiple layers of administration, marking one of the most complex and consequential permitting phases for the route.



As Dan Davis told the Metro Connect audience in February 2025, the build involved “Two states, an independent sovereign Native American nation, five municipalities, six counties, Bureau of Indian Affairs (BIA), Bureau of Land Management (BLM), Department of Defence (DoD), National Park, National Forest... and a partridge in a pear tree.”

In terms of the build, the Phoenix–Salt Lake City system will form part of the company's broader 3,500-mile programme of new backbone construction across the western United States. Due to be constructed approximately 90% underground, the route involves geological complexity, with much of the route granite and requiring powerful rock saws. But as a result, the project delivers the first major backbone fiber connection to pass across Navajo Nation land, providing fiber connections to markets previously under-served and opening opportunities for data center construction.

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DC BLOX, Myrtle Beach to Atlanta



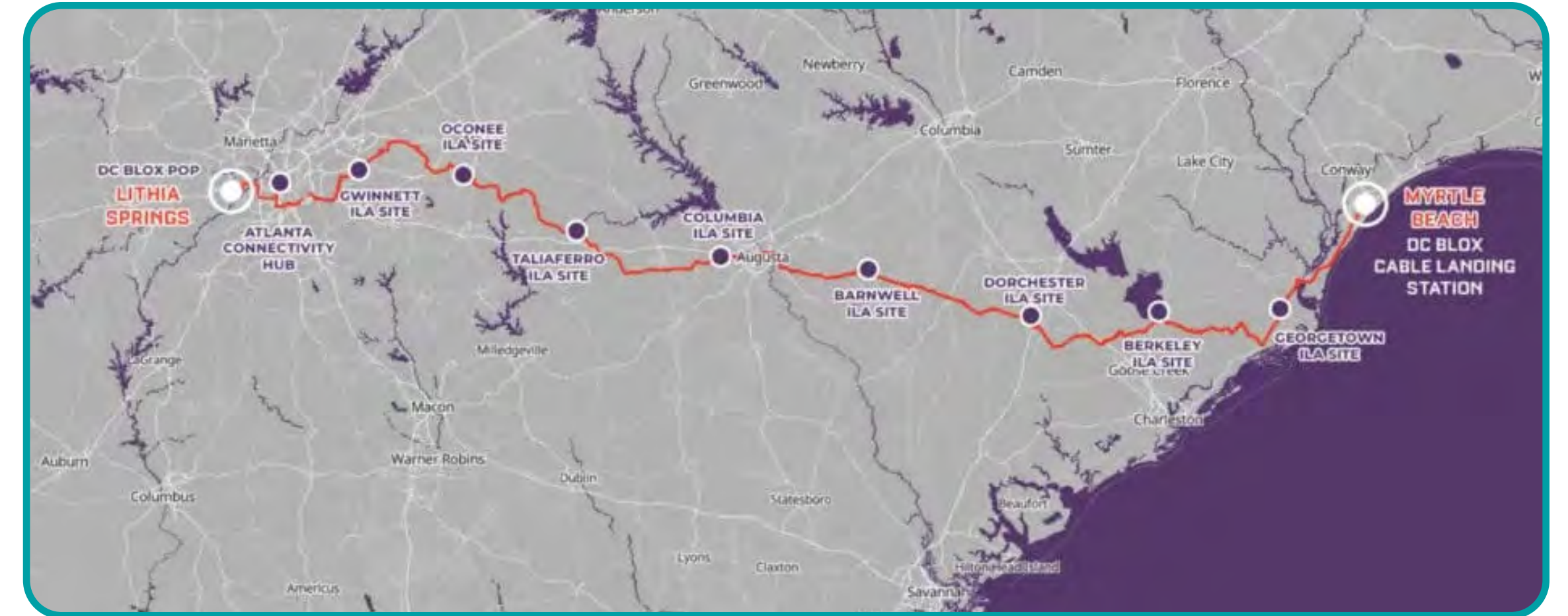
DC BLOX completed a major dark fiber route between Myrtle Beach, South Carolina and Atlanta, Georgia in May 2024. Starting at the company's existing cable landing station, the route is one of the most important new dark fiber builds in the region in recent years.

While the system serves carriers, ISPs and enterprise operators, one of its main advantages lies in creating a seamless, low-latency, high-capacity path linking new subsea cable landings directly to Atlanta's hyperscale data-center ecosystem. The Georgian city is the second-largest data center market in the United States after northern Virginia, and added close to a gigawatt of leased space in 2024 alone.

For digital infrastructure providers and the DC fiber market, the DC BLOX project shows the advantage of unified network infrastructure from subsea to DC interconnect – and how well-planned acquisitions can clear out some of the most common construction hurdles.

The backdrop: intercontinental capacity driving data center interconnect

DC BLOX opened its Myrtle Beach cable landing station in 2023 (it will be expanded in 2026, the company announced in October 2025) - a starting point for a quick, uncongested route directly inland to Atlanta. This is important for the U.S. Southeast, which has historically depended on inland routes from further north for interconnectivity.



As a company that builds both fiber and data centers, it is logical that the DC BLOX strategy involves owning and operating as many of the network points as possible to deliver the kind of reliable, high-capacity service that hyperscalers require. This strategic alignment is reinforced by DC BLOX's long-term plan to offer an integrated platform: subsea termination at the coast, dark-fiber backbone transport inland, and interconnection into key hyperscale-adjacent facilities in metro Atlanta, with a dark fiber metro ring currently in development that will connect directly to two hyperscale data center developments.

The build: high-capacity fiber for high-capacity demands

The Myrtle Beach–Atlanta route runs from the CLS through Charleston and Augusta to downtown Atlanta (including major interconnection points such as 56 Marietta Street) before extending to the Lithia Springs data-center campus. Technically speaking, the project includes high-strand count, rolled-ribbon fiber, which cut splicing by nearly half, as well as eight in-line amplifier sites at regular intervals along the route and handhole access every 2,000 feet.



The strategy: acquire to build

This is a build characterised by distinct phases – first the CLS was built, then the east-west dark fiber build, and finally the upcoming Atlanta metro ring. But there was an important initial stage that paved the way for the build to take place. As with any fiber project, right-of-way and preliminary route control was needed before the bulldozers could fire up, and this was simplified greatly by DC BLOX acquiring various network assets from Light Source Communications and Ascendant Capital Fiber, including routes between South Carolina and Georgia. This gave the company existing rights-of-way, preliminary fiber footprint, and a head start in delivering the full Myrtle Beach–Atlanta system.

The focus: a hyperscale-specific build

While the project does serve various other players in the market, particularly ISPs, the architecture is conspicuously hyperscale-aligned. As well as the technical specifications supporting reliable, scalable and high-capacity traffic, there are several other factors that provide a blueprint for hyperscale-focused data center interconnection projects. The pairing with a proprietary CLS means one single partner from subsea to the doors of the data center, and the addition of a metro ring means that new facilities can be planned around the Atlanta metro with a full connectivity solution already more or less available.

Additionally, the greenfield nature of the route, giving an alternative to congested routes, suits how hyperscalers generally like to connect and manage their facilities, particularly on the interconnection side – offering predictability, simpler SLA management, and ultimately more control and oversight on the performance of their networks and products.

All images via DC BLOX

Lightsource Communications, Kansas City dark fiber network

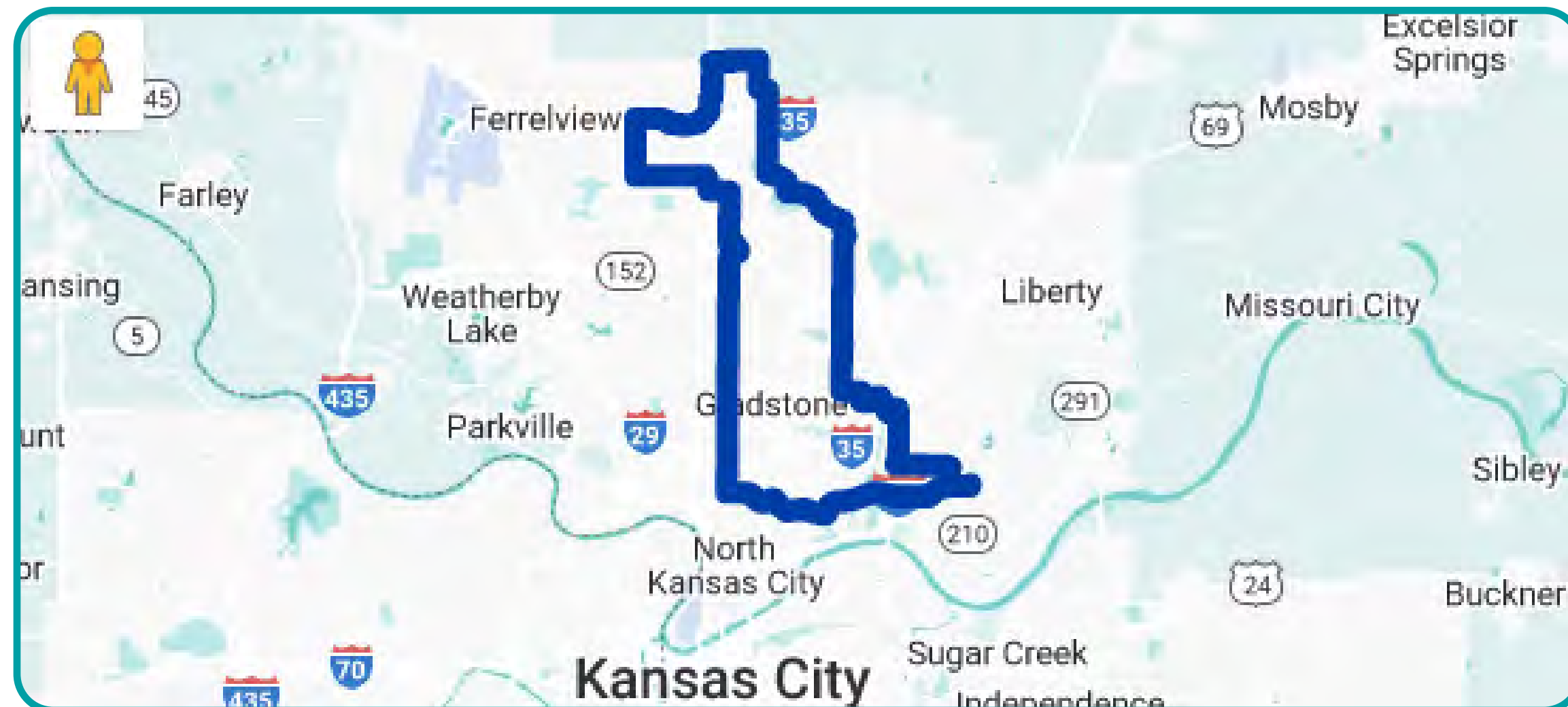


A 35-mile dark fibre metro ring in Kansas City, Missouri, recently delivered by Light Source Communications (LSC), is a good example of how hyperscalers and fibre builders can work together to deliver connectivity improvements that the whole market can benefit from. While the ring was built to suit the demands of a hyperscaler anchor tenant, four other data centres are also now connected. President and CSO Pete Empie Sr. and CEO Debra Freitas talked exclusively to Metro Connect about the project - how it came about, the challenges of building it, and what the industry can learn from the process.

The development of the Kansas City project followed the philosophy of letting customer demand and requests decide where fibre gets put down, rather than the 'build it and they will come' model. "Light Source never speculates on routes," said Freitas. "We are solution providers for our customers, so our customer needs dictate where we build routes. They give us an A and Z location, and Light Source designs those routes." Demand-driven builds lower the commercial risk of expensive fibre builds, and LSC applied this model in KansasCity: "We go where our customers want."

Meeting the challenges: permits and authority relations

One of the most significant hurdles in fibre deployment is navigating the complex landscape of state and municipal permitting, which can vary significantly almost by the mile. LSC's strategy begins with securing state-level licensing as a public utility, which streamlines interactions with local authorities. "The first thing we always do in any route is get licensed in the state to make sure we are acknowledged as a public utility, which helps us move through the municipalities," Freitas said. Each municipality presents unique requirements and challenges, so LSC employs local experts who understand both the terrain and the regulatory environment. "We employ folks who are experts in that area and help us manoeuvre those things. In the design and engineering process, we go to local folks who live there so they know the terrain and the right people in those municipalities to work with."



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Building relationships with municipal leaders doesn't just speed up the build. It also strengthens community relationships - a particular issue with data centre construction. "We form a relationship with each municipality. We have agreements, and almost every one of them is individual, which has its challenges but is also a good thing. We get to know them and tailor our agreements to them," said Empie.

Meeting the challenges: staffing and labor shortages

Labour shortages are a common concern in the fibre industry and across digital infrastructure, but LSC reported no such issues, partly due to longstanding contractor relationships and the nature of its projects being attractive to work on. "Light Source has a strong team of veteran telecom folks who have been in the industry 30-plus years as our exec team," Freitas said. "We haven't run into labour issues. We think it's because we've built good relationships over the years and we try to partner with our subcontractors and EPC providers in ways that make them want to work with us again." Pete Empie added, "Our projects are the cream of the crop for contractors."

Meeting the challenges: what do data centers want?

When asked about the most important factors for servicing data centre clients, LSC's leadership emphasised three core principles: route diversity, underground security, and future-proof capacity. "Data centre providers need diversity," Freitas said. "The network is always most secure when it's underground. Then future proofing, not just for us but for our customers. Getting as much capacity available to them for today and for their future is key."

A key differentiator for LSC is its exclusive focus on dark fibre. "We are solely focused on dark fibre," Empie explained. "We're not looking for lit services or other types of products. Our hyperscalers love that fact." LSC's experiences show the value of a laser focus, not just on what customers want, but also on a specific area of expertise, as prioritising dark fibre shows. As Freitas summarised, "We don't speculate. We're not chasing; we're being invited" - showing the value for data centre builders of solidifying relationships with fibre providers and coming to agreements as early as possible.

Image courtesy of Light Source Communications

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Fiberlight and MDC, Dallas to Mexico

Cross-border connectivity between the US and Mexico is an important part of the landscape, and Fiberlight and MDC Data Centres teamed up to deliver two new redundant fiber routes from Dallas, one to Monterey and the other to the data center hub of Querétaro. The two companies showed the value of existing relationships here - Fiberlight already supplies fibre to MDC's Texas facility in Eagle Pass, and this made the planning, negotiating and development process considerably easier.



Zayo: 5000 miles of AI-focused routes

Early 2025 saw Zayo announce 5,000 miles of long-haul fiber routes, focusing on places where heavy AI facility growth is expected. This 'preventative' buildout of fiber is not within the reach of every provider, but Zayo's scale means it can manage such a strategy, and this move is an example of how fiber providers can plan a role in defining where data centres will be located, rather than DC builders selecting a site and then looking for fiber to connect to it.

Building and Financing the Next Generation of U.S. Digital Infrastructure

When it comes to uniting the data centre and fibre worlds, there is only one platform to be at this year - Metro Connect Fall, the event that brings fiber, data centers, capital and energy together.

Join 3,000+ senior digital infrastructure leaders from FTTH, middle-mile & long-haul fiber, data centers, hyperscalers, construction, energy, investors, legal & more.

The mid-year meeting for capital, connectivity & compute

This is where networks get financed and scaled, while deals get done.

High-impact content and curated networking

Expect strategic panels, technical deep dives, and networking designed to accelerate partnerships and inform your decision-making.



3,000+
Decision-makers
in attendance



150+
Year on year
growth



70+
C-level, VP
and director
attendees



250+
Meeting spaces
booked