360iResearch

Cable Laying Vessel Market

Global Forecast 2026-2032

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Table of Contents

1. Preface 10
   1.1. Objectives of the Study 10
   1.2. Market Definition 10
   1.3. Market Segmentation & Coverage 11
   1.4. Years Considered for the Study 14
   1.5. Currency Considered for the Study 14
   1.6. Language Considered for the Study 14
   1.7. Key Stakeholders 15
2. Research Methodology 16
   2.1. Introduction 16
   2.2. Research Design 16
      2.2.1. Primary Research 17
      2.2.2. Secondary Research 17
   2.3. Research Framework 17
      2.3.1. Qualitative Analysis 18
      2.3.2. Quantitative Analysis 19
   2.4. Market Size Estimation 19
      2.4.1. Top-Down Approach 19
      2.4.2. Bottom-Up Approach 19
   2.5. Data Triangulation 20
   2.6. Research Outcomes 20
   2.7. Research Assumptions 21
   2.8. Research Limitations 21
3. Executive Summary 23
   3.1. Introduction 23
   3.2. CXO Perspective 24
   3.3. New Revenue Opportunities 25
   3.4. Next-Generation Business Models 26
   3.5. Industry Roadmap 27
4. Market Overview 29
   4.1. Introduction 29
   4.2. Key Growth Contribution 30
   4.3. Industry Ecosystem & Value Chain Analysis 31
      4.3.1. Supply-Side Analysis 32
      4.3.2. Demand-Side Analysis 33
      4.3.3. Stakeholder Analysis 34
   4.4. Market Dynamics 35
      4.4.1. Key Drivers 36
         4.4.1.1. Contracted power-cable work creates an identifiable asset-procurement trigger 36
         4.4.1.2. Repair-fleet replacement creates demand distinct from new installation projects 36

4.4.1.3. Mission and energy requirements stimulate modernization without guaranteeing newbuild demand....36
4.4.1.4. Public resilience commitments create qualified procurement pathways....37
4.4.2. Key Restraints....37
4.4.2.1. Infrastructure commitments can reverse before marine execution....37
4.4.2.2. Readiness obligations restrict discretionary vessel deployment....38
4.4.2.3. Activity-specific permissions separate technical capability from commercial access....38
4.4.3. Key Opportunities....38
4.4.3.1. Maintenance renewal with service continuity....38
4.4.3.2. Specialist-led access to vessel construction....39
4.4.3.3. Platforms for constrained access and nearshore handoffs....39
4.4.3.4. Existing-asset mission upgrade and integration....39
4.4.4. Key Challenges....40
4.4.4.1. Package interfaces require explicit delivery accountability....40
4.4.4.2. Conversions must reconcile inherited assets with the intended acceptance scope....40
4.4.4.3. Repair readiness depends on more than possession of a suitable vessel....40
4.4.4.4. Power-architecture labels must be separated from mission and compliance evidence....41
4.5. Porter's Five Forces Analysis....41
4.6. PESTLE Analysis....43
4.7. Market Outlook....44
4.7.1. Near-Term Market Outlook (0-2 Years)....45
4.7.2. Medium-Term Market Outlook (3-5 Years)....46
4.7.3. Long-Term Market Outlook (5-10 Years)....47
4.8. Go-to-Market Strategy....48
5. Market Insights....50
5.1. Consumer Insights & End-User Perspective....50
5.2. Consumer Experience Benchmarking....51
5.3. Opportunity Mapping....52
5.4. Distribution Channel Analysis....54
5.5. Pricing Trend Analysis....55
5.6. Regulatory Compliance & Standards Framework....56
5.7. ESG & Sustainability Analysis....58
5.8. Disruption & Risk Scenarios....59
5.9. Return on Investment & Cost-Benefit Analysis....61
6. Cumulative Impact of Artificial Intelligence 2026....63
7. Cable Laying Vessel Market, by Vessel Platform....65
7.1. Ships....67
7.2. Barges....68
8. Cable Laying Vessel Market, by Mission Configuration....70
8.1. Installation-Focused Vessels....73
8.2. Multipurpose Construction Vessels....75
8.3. Combined Installation and Repair Vessels....77
8.4. Repair-Focused Vessels....78
9. Cable Laying Vessel Market, by Cable Compatibility....80

9.1. Multiple Cable Families 84
9.2. Power Cables Only 85
9.3. Communications Cables Only 87
9.4. Sensing Cables Only 88
10. Cable Laying Vessel Market, by Station-Keeping System 90
10.1. DP Class 2 94
10.2. DP Class 3 95
10.3. Anchored or Moored Positioning 97
10.4. DP Class 1 98
10.5. Manual or Tug-Assisted Positioning 100
10.6. Seabed-Supported Positioning 101
10.7. Basic Automatic Positioning 103
11. Cable Laying Vessel Market, by Onboard Power Architecture 105
11.1. Hybrid Electric Power 108
11.2. Conventional Engine-Based Power 110
11.3. All-Electric Power 111
12. Cable Laying Vessel Market, by Infrastructure Application 113
12.1. Multi-Infrastructure Portfolios 119
12.2. Offshore Renewable Energy 120
12.3. Telecommunications Networks 122
12.4. Power Transmission and Distribution 123
12.5. Defense and Security Networks 125
12.6. Scientific and Environmental Monitoring 126
12.7. Industrial Infrastructure 127
13. Cable Laying Vessel Market, by Vessel Buyer 130
13.1. Marine Installation and Maintenance Contractors 134
13.2. Integrated Cable-System Suppliers 135
13.3. Vessel Owners and Leasing Companies 137
13.4. Captive Infrastructure and Public-Service Operators 138
14. Cable Laying Vessel Market, by Construction Pathway 140
14.1. Newbuilds 142
14.2. Conversions 143
15. Cable Laying Vessel Market, by Operating Envelope 145
15.1. Unrestricted Seagoing 148
15.2. Restricted Seagoing 149
15.3. Sheltered and Inland Waters 151
16. Cable Laying Vessel Market, by Procurement Structure 153
16.1. Single-Prime Delivery 155
16.2. Buyer-Managed Package Delivery 157
17. Cable Laying Vessel Market, by Cable Payload Capacity 159
17.1. High Cable Payload 162
17.2. Ultra-High Cable Payload 163

17.3. Medium Cable Payload 165
17.4. Low Cable Payload 166
18. Cable Laying Vessel Market, by Cable-Laying Depth Capability 168
18.1. Deepwater Capability 171
18.2. Intermediate-Depth Capability 173
18.3. Shallow-Water Capability 174
18.4. Ultra-Deepwater Capability 176
19. Cable Laying Vessel Market, by Region 178
19.1. Europe 181
19.2. Asia-Pacific 187
19.3. North America 193
19.4. Middle East 197
19.5. Latin America 201
19.6. Africa 206
20. Cable Laying Vessel Market, by Group 210
20.1. NATO 214
20.2. European Union 221
20.3. G7 227
20.4. BRICS 231
20.5. ASEAN 235
20.6. GCC 240
21. Cable Laying Vessel Market, by Country 245
21.1. Italy 250
21.2. Japan 254
21.3. China 258
21.4. France 262
21.5. United States 266
21.6. South Korea 270
21.7. Canada 274
21.8. United Kingdom 278
21.9. Germany 282
21.10. India 286
21.11. Russia 290
21.12. Australia 294
21.13. Brazil 298
21.14. Spain 302
21.15. Mexico 306
22. Competitive Landscape 310
22.1. Market Share Analysis, 2025 310
22.2. Market Concentration Analysis, 2025 312
22.3. Recent Developments & Impact Analysis, 2025 313
22.4. Product Portfolio Analysis, 2025 315

22.5. Benchmarking Analysis, 2025 317
23. Company Profiles 319
23.1. Prysmian 319
23.2. Nexans 320
23.3. NKT 320
23.4. Alcatel Submarine Networks 321
23.5. SubCom 322
23.6. Orange Marine 323
23.7. Global Marine Group 323
23.8. Jan De Nul 324
23.9. Van Oord 325
23.10. DEME Group 326
23.11. Boskalis 327
23.12. Seaway7 327
23.13. LD Armateurs 328
23.14. OMS Group Sdn Bhd 329
23.15. S. B. Submarine Systems 330
23.16. KDDI Cableships & Subsea Engineering Inc. 331
23.17. NTT WORLD ENGINEERING MARINE, Inc. 332
23.18. LS Marine Solution 333
23.19. Taihan Cable & Solution Co., Ltd. 334
23.20. Ningbo Orient Wires & Cables Co. Ltd 335
23.21. Hengtong Group Co., Ltd. 336
23.22. ZTT Group 337
23.23. NEC Corporation 338
23.24. VARD 339
23.25. Ulstein Group 340
23.26. Colombo Dockyard PLC 340
23.27. Damen Shipyards Group 341
23.28. Royal IHC 342
23.29. Shanghai Zhenhua Heavy Industries Co., Ltd. 342
23.30. N-Sea 343
23.31. Caldwell Marine International, LLC 344
23.32. International Cableship Pte Ltd 345
23.33. Samsung C&T Corporation 345
23.34. Neptune Marine 346
23.35. Huisman 347
23.36. Crowley Wind Services 348
23.37. IT International Telecom Inc. 349
23.38. Canpac Marine Services 350
23.39. Kokosing Industrial 351
23.40. J.F. Brennan Company, Inc. 352
23.41. Kalypso Offshore Energy, LLC 353

23.42. JMS Naval Architects....353
23.43. McDonough Marine Service....354
23.44. LAD Services....355
23.45. Dominion Diving Ltd....356
23.46. DEMAR Instaladora y Constructora S.A. de C.V....357
23.47. Sustentos Industriales Y Marítimos, S.A. De C.V....357
23.48. AQUANTICA Proyectos Marinos....358
23.49. Oceaneering....359
23.50. Edison Chouest Offshore....359
23.51. Blue Marine Telecom....360
23.52. Prates Navegação e Logística....361
23.53. Superfície Engenharia....362
23.54. VSP Offshore Underwater Service....363
23.55. BENTOS....363
23.56. GeoMares S.A.S....364
23.57. Power Sub Link SA (PSL)....365
23.58. LEAD Marine Contractors Limited....366
23.59. Capital Signal Company Limited....366
23.60. Swift Offshore & Construction Ltd....367
23.61. Dixstone....368
23.62. SERMACOL C.A....368
23.63. SERPROSUB C.A....369
23.64. Paraná Logística....369
23.65. Asso.subsea....370
23.66. Baltic Offshore....371
23.67. JD-Contractor A/S....372
23.68. JD Crafts A/S....373
23.69. Briggs Marine....373
23.70. Enshore Subsea....374
23.71. Herbosch-Kiere NV....375
23.72. DeepOcean....376
23.73. Østensjø Rederi....377
23.74. Cecon Contracting....377
23.75. Seaworks Kabel AS....378
23.76. Meriaura....379
23.77. CNGS Engineering....380
23.78. Lloyd Werft....380
23.79. Holland Shipyards Group....381
23.80. Freire Shipyard....382
23.81. Cintranaval....383
23.82. Kongsberg Maritime....384
23.83. Ship Design Group....384
23.84. GLO Marine....385

23.85. Remontowa Holding SA 386
23.86. Salt Ship Design 387
23.87. Kleven Verft 387
23.88. TFKable Group 388
23.89. DOF Group ASA 389
23.90. Solstad Maritime ASA 390
23.91. Astander 390
23.92. E-marine PJSC 391
23.93. NMDC Energy 392
23.94. Ali & Sons Marine Engineering Factory 392
23.95. Tersan Shipyard Inc. 393
23.96. Sefine Shipyard 394
23.97. Arab Tanker Services and Contracting L.L.C. 395
23.98. CCC (Underwater Engineering) S.A.L. 395
23.99. Qatar Navigation Q.P.S.C. 395
23.100. Pina Underwater Services Ltd 396
23.101. Ocean Diving & Marine Services W.L.L. 397
23.102. Streamline International LLC 397
23.103. Asia Akam Industry 398
23.104. Valentine Maritime Gulf L.L.C. 398
23.105. Suntech International LLC 399
23.106. Keyfield International Bhd 399
23.107. Mermaid Subsea Services 400
23.108. Maridive and Oil Services 401
23.109. Petroleum Marine Services 402
23.110. West African Ventures 402
23.111. Kipo Subsea Ltd 403
23.112. VNC Offshore Limited 404
23.113. Hydrodive Group 404
23.114. Mertech Marine 405
23.115. GMC Diving 405
23.116. STAPEM Offshore 406
23.117. Swell Marine Services 407
23.118. Seaworks Maroc 407
23.119. Joph Oil Ghana Limited 408
23.120. MarineServ West Africa 408
23.121. Southern Engineering Co. Ltd 409
23.122. ASEAN Cableship Pte Ltd 409
23.123. PT Ketrosden Triasmitra Tbk 410
23.124. Prima Navalink 411
23.125. TAMS Group 412
23.126. Ocean Engineering Systems 412
23.127. Quest Maritime Services 413

23.128. Dong Fang Offshore Co., Ltd. 413
23.129. ATE Energy International Co., Ltd. 415
23.130. Synergy Marine Group 415
23.131. Pacific Shipbuilding Joint Stock Company 416
23.132. Mermaid Maritime Public Company Limited 417
23.133. Penta-Ocean Construction Co., Ltd. 417
23.134. Fuyo General Lease Co., Ltd. 418
23.135. PaxOcean Group 419
23.136. Toyo Construction Co., Ltd. 419
23.137. MOL Maritex Co., Ltd. 420
23.138. Kojimagumi Co., Ltd. 421
23.139. SEKIKAIJI Industry Co., Ltd 422
23.140. NYK Line 423
23.141. Sumitomo Electric Industries, Ltd. 423
23.142. Furukawa Electric Co., Ltd. 424
23.143. Dimension Consultants 425
23.144. Jiangsu Haixin Shipping Heavy Industry Co., Ltd. 426
23.145. China Merchants Heavy Industry 426
23.146. Jiangsu Huatai Shipbuilding 427
23.147. G8 427
23.148. HD Hyundai Mipo 428
23.149. Nantong Xiangyu Shipbuilding & Offshore Engineering 429
23.150. Seaworks 429
23.151. Skipsteknisk AS 430
23.152. Marin Teknikk AS 431
23.153. Breeze Ship Design 432
23.154. Westcon Yards AS 432
23.155. Taizhou Sanfu Ship Engineering Co., Ltd. 433
23.156. Dejing Group 433
23.157. FiberHome 434
23.158. Dagang NeXchange Berhad 435
23.159. PT Samudera Mbiantu Sesami 435
23.160. Fujian Mawei Shipbuilding 436
23.161. Multi Ocean Shipyard 436
23.162. C-Job Naval Architects 437
23.163. MDM 439

24. Companies Covered 441

25. Key Experts 447

1. Preface

1.1. Objectives of the Study

- Determine how buyers align vessel platform, mission configuration, cable compatibility, payload, depth capability, and operating envelope with the infrastructure portfolio the vessel is intended to serve.
- Identify the specifications, positioning qualification, classification, and acceptance conditions a buyer must verify before treating a vessel as eligible for a particular procurement.
- Examine the capability evidence, integration support, and continuing-service requirements that could constrain supplier entry or buyer switching between vessel offerings.
- Compare Single-Prime Delivery and Buyer-Managed Package Delivery through responsibility for vessel and mission-equipment interfaces, warranty coverage, certification, and delivery acceptance.
- Assess the commercial conditions under which Newbuilds and Conversions address the buyer's requirements, while distinguishing the resulting vessel capability from the scope of the construction or conversion package.
- Examine how conventional, hybrid electric, and all-electric power architectures relate to mission requirements, supporting infrastructure, and buyer acceptance without presuming that category inclusion establishes equivalent deployment options.
- Establish the connection between infrastructure activity and vessel acquisition or conversion decisions, distinguishing application relevance from an actual procurement commitment.
- Identify which deployment approvals, buyer requirements, and contractual conditions need verification for commercial access within the global market, without treating seagoing capability as unrestricted jurisdictional access.

Sources & Evidence

1. Efficient DP Operation

· The IMO portal identifies requirements involving flag states, classification societies, and charterers, supporting investigation of vessel-specific positioning qualification. ([greenvoyage2050.imo.org](https://greenvoyage2050.imo.org/technology/efficient-dp-operation/))

1.2. Market Definition

The global Cable Laying Vessel market covers ships and barges built or converted for cable-related marine missions. Included offerings encompass installation-focused vessels, repair-focused vessels, combined installation and repair vessels, and multipurpose construction vessels with cable-related mission configurations. Power, communications, sensing, and multiple cable families are included, as are unrestricted seagoing, restricted seagoing, and sheltered or inland-water operating contexts.

The vessel is the studied offering. Mission equipment, station-keeping systems, onboard power architecture, payload capability, and cable-laying depth capability describe its configuration rather than independently expanding the study to every marine equipment product. Conventional engine-based, hybrid electric, and all-electric architectures participate within the defined scope, alongside the accepted automatic, anchored, moored, seabed-supported, manual, and tug-assisted positioning categories.

Relevant vessel buyers include integrated cable-system suppliers, marine installation and maintenance contractors, vessel owners and leasing companies, and captive infrastructure and public-service operators. Newbuild and conversion procurement is examined through both single-prime and buyer-managed delivery structures. Upstream shipbuilding materials, standalone cable manufacture, and downstream operation of completed infrastructure are adjacent activities, not vessel offerings. Cable installation and maintenance operations explain vessel use but are not interchangeable with procurement of the vessel. The geographic boundary is Global; any geographic comparison remains additional analysis within that boundary.

1.3. Market Segmentation & Coverage

Vessel Platform distinguishes Ships and Barges, while Mission Configuration distinguishes Installation-Focused Vessels, Repair-Focused Vessels, Combined Installation and Repair Vessels, and Multipurpose Construction Vessels. Platform describes the marine asset; mission describes its cable-related role. These are separate commercial attributes. Prysmian's 2015 conversion of Cable Enterprise from a moored cable-laying barge to a DP2 cable-laying barge illustrates why a positioning change need not change the platform category.

Cable Compatibility covers Power Cables Only, Communications Cables Only, Sensing Cables Only, and Multiple Cable Families. This lens concerns the cable families associated with the vessel offering, not the buyer's entire business. Station-Keeping System separately covers DP Class xx.xx DP Class xx.xx DP Class xx.xx Basic Automatic Positioning, Anchored or Moored Positioning, Seabed-Supported Positioning, and Manual or Tug-Assisted Positioning. Positioning qualification requires attention to vessel-specific capabilities and acceptance requirements involving flag states, classification societies, and charterers; the platform label alone does not resolve it.

Onboard Power Architecture covers Conventional Engine-Based Power, Hybrid Electric Power, and All-Electric Power. It distinguishes the vessel's power configuration from the type of cable carried. Builder descriptions of customizable mission-equipment arrangements and hybrid designs reinforce the need to assess power architecture separately from mission and cable compatibility, without assuming that every included combination is commercially demonstrated.

Infrastructure Application includes Offshore Renewable Energy, Power Transmission and Distribution, Telecommunications Networks, Industrial Infrastructure, Scientific and Environmental Monitoring, Defense and Security Networks, and Multi-Infrastructure Portfolios. These categories identify the infrastructure context behind vessel requirements. They do not

make the value of the underlying energy, communications, monitoring, or security project part of the vessel offering.

Vessel Buyer includes Integrated Cable-System Suppliers, Marine Installation and Maintenance Contractors, Vessel Owners and Leasing Companies, and Captive Infrastructure and Public-Service Operators. The axis distinguishes the acquiring organization's role from the infrastructure application it serves. Construction Pathway covers Newbuilds and Conversions, keeping purpose-built delivery and reconfiguration of an existing asset within scope while preserving their different procurement perimeters.

Operating Envelope covers Unrestricted Seagoing, Restricted Seagoing, and Sheltered and Inland Waters. It describes the intended operating context rather than a blanket entitlement to deploy in every jurisdiction. Procurement Structure covers Single-Prime Delivery and Buyer-Managed Package Delivery, distinguishing the organization of delivery responsibility without presuming equivalent package content or risk allocation.

Cable Payload Capacity includes Low Cable Payload, Medium Cable Payload, High Cable Payload, and Ultra-High Cable Payload. Cable-Laying Depth Capability includes Shallow-Water Capability, Intermediate-Depth Capability, Deepwater Capability, and Ultra-Deepwater Capability. Payload and depth are separate suitability lenses; comparisons require consistent boundaries and equivalent capability definitions rather than an assumed universal meaning for each tier.

Each axis provides a different view of the same vessel offering. Multiple Cable Families and Multi-Infrastructure Portfolios affirmatively retain cross-family and cross-application configurations within the study. The axes are not additive market opportunities, and inclusion of a category does not establish supplier capability, buyer acceptance, or commercial interchangeability.

Table 1. Global Cable Laying Vessel Market Segmentation & Coverage

Segmentation	Coverage
Cable Compatibility	• Multiple Cable Families • Power Cables Only • Communications Cables Only • Sensing Cables Only
Cable Payload Capacity	• High Cable Payload • Ultra-High Cable Payload • Medium Cable Payload • Low Cable Payload
Cable-Laying Depth Capability	• Deepwater Capability • Intermediate-Depth Capability • Shallow-Water Capability • Ultra-Deepwater Capability
Construction Pathway	• Newbuilds • Conversions

Table 1 - continued

Segmentation	Coverage
Infrastructure Application	• Multi-Infrastructure Portfolios • Offshore Renewable Energy • Telecommunications Networks • Power Transmission and Distribution • Defense and Security Networks • Scientific and Environmental Monitoring • Industrial Infrastructure
Mission Configuration	• Installation-Focused Vessels • Multipurpose Construction Vessels • Combined Installation and Repair Vessels • Repair-Focused Vessels
Onboard Power Architecture	• Hybrid Electric Power • Conventional Engine-Based Power • All-Electric Power
Operating Envelope	• Unrestricted Seagoing • Restricted Seagoing • Sheltered and Inland Waters
Procurement Structure	• Single-Prime Delivery • Buyer-Managed Package Delivery
Station-Keeping System	• DP Class xx.xx • DP Class xx.xx • Anchored or Moored Positioning • DP Class xx.xx • Manual or Tug-Assisted Positioning • Seabed-Supported Positioning • Basic Automatic Positioning
Vessel Buyer	• Marine Installation and Maintenance Contractors • Integrated Cable-System Suppliers • Vessel Owners and Leasing Companies • Captive Infrastructure and Public-Service Operators
Vessel Platform	• Ships • Barges

Sources & Evidence

1. The Damen CLV: a new generation of cable layer

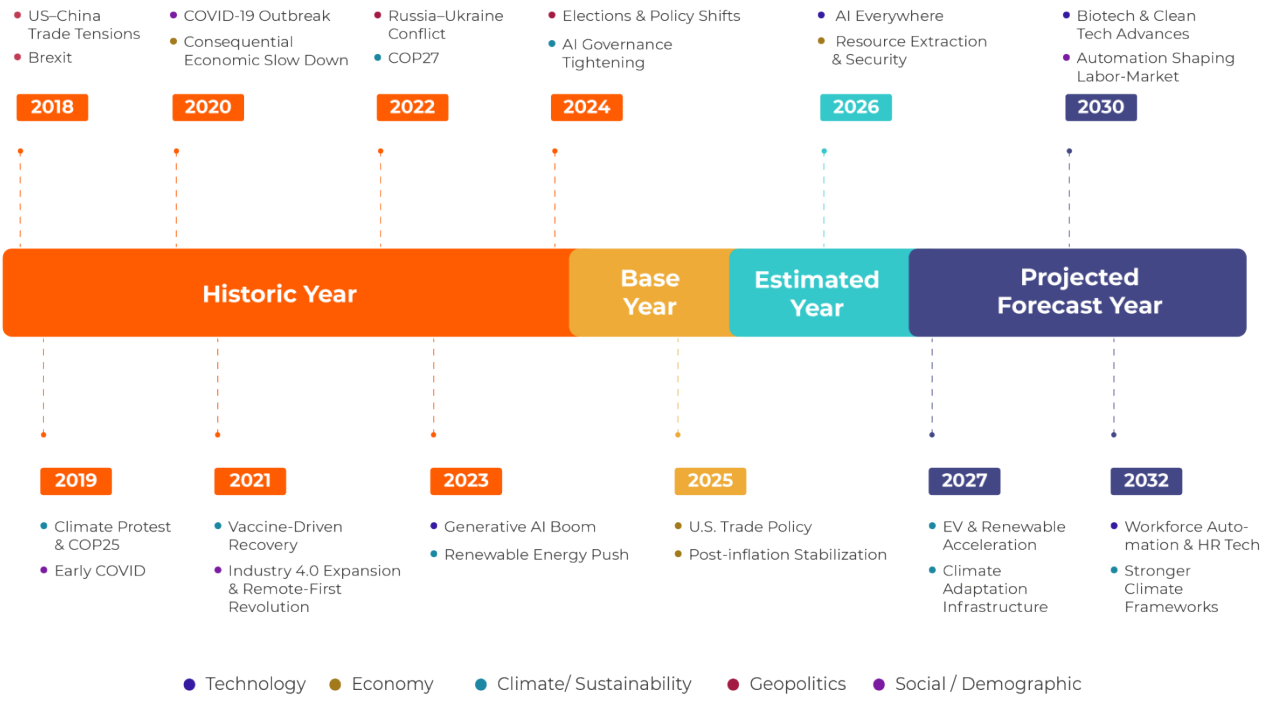
   · Damen describes customizable mission-equipment arrangements for installation, maintenance, and repair, as well as a hybrid CLV design, supporting separate mission and power-architecture lenses. ([damen.com](https://www.damen.com/insights-center/articles/the-damen-clv-a-new-generation-of-cable-layer))

2. Prysmian's Cable Enterprise Ready for Sail Out Following Upgrade Works
   · Prysmian's 2015 release describes Cable Enterprise's conversion from a moored cable-laying barge to a DP2 cable-laying barge, directly supporting separation of platform and positioning configuration. ([prysmian.com](https://www.prysmian.com/sites/www.prysmian.com/files/media/documents/PR_varo.pdf))
3. Efficient DP Operation
   · The IMO portal treats positioning capability and equipment requirements as distinct issues, supporting a station-keeping lens separate from vessel platform. ([greenvoyage2050.imo.org](https://greenvoyage2050.imo.org/technology/efficient-dp-operation/))

1.4. Years Considered for the Study

The study uses 2024 as the historical year, 2025 as the base year, 2026 as the estimated year, and 2032 as the forecast horizon. Historical and base-year observations, estimated-year interpretation, and forward-looking expectations retain distinct status.

Figure 1. Global Cable Laying Vessel Market, Years Considered for the Study



1.5. Currency Considered for the Study

The reporting currency is the United States dollar (USD). Monetary results are expressed as absolute USD amounts.

1.6. Language Considered for the Study

The study is published in American English.

1.7. Key Stakeholders

- Shipbuilders and conversion yards: specification, construction-pathway, integration, and delivery decisions determine which vessel requirements they can credibly address and which responsibilities they accept.
- Mission-equipment and marine-system providers: compatibility and interface requirements determine how cable-handling, positioning, and power systems fit within the vessel package and its acceptance responsibilities.
- Integrated Cable-System Suppliers: vessel procurement must be related to their cable-system missions while keeping cable manufacture, vessel acquisition, and infrastructure-service execution distinct.
- Marine Installation and Maintenance Contractors: mission flexibility, buyer qualification, continuing support, and procurement responsibility shape their vessel acquisition and conversion choices.
- Vessel Owners and Leasing Companies: asset specification, construction pathway, contractual delivery scope, and suitability for intended users determine the commercial exposure associated with ownership and leasing.
- Captive Infrastructure and Public-Service Operators: direct procurement decisions require a connection between their infrastructure obligations and the vessel capabilities needed to support them.
- Infrastructure developers and network sponsors: energy, telecommunications, industrial, scientific, environmental, defense, and security requirements provide application context, but their projects do not automatically constitute vessel purchases.
- Flag administrations, classification societies, and relevant deployment authorities: their requirements affect qualification and acceptance; commercial decisions need to distinguish these requirements from an advertised vessel category.

Sources & Evidence

1. Efficient DP Operation

· The IMO portal identifies flag states and classification societies among the parties setting positioning requirements, supporting their qualification-related stakeholder role. ([greenvoyage2050.imo.org](https://greenvoyage2050.imo.org/technology/efficient-dp-operation/))

2. Research Methodology

2.1. Introduction

The study approaches the Cable Laying Vessel market through the relationship between a configured marine asset, the buyer acquiring it, and the infrastructure missions it is intended to serve. The analytical focus is vessel procurement and capability fit, not an assumption that cable projects, marine-service activity, and vessel acquisition are interchangeable.

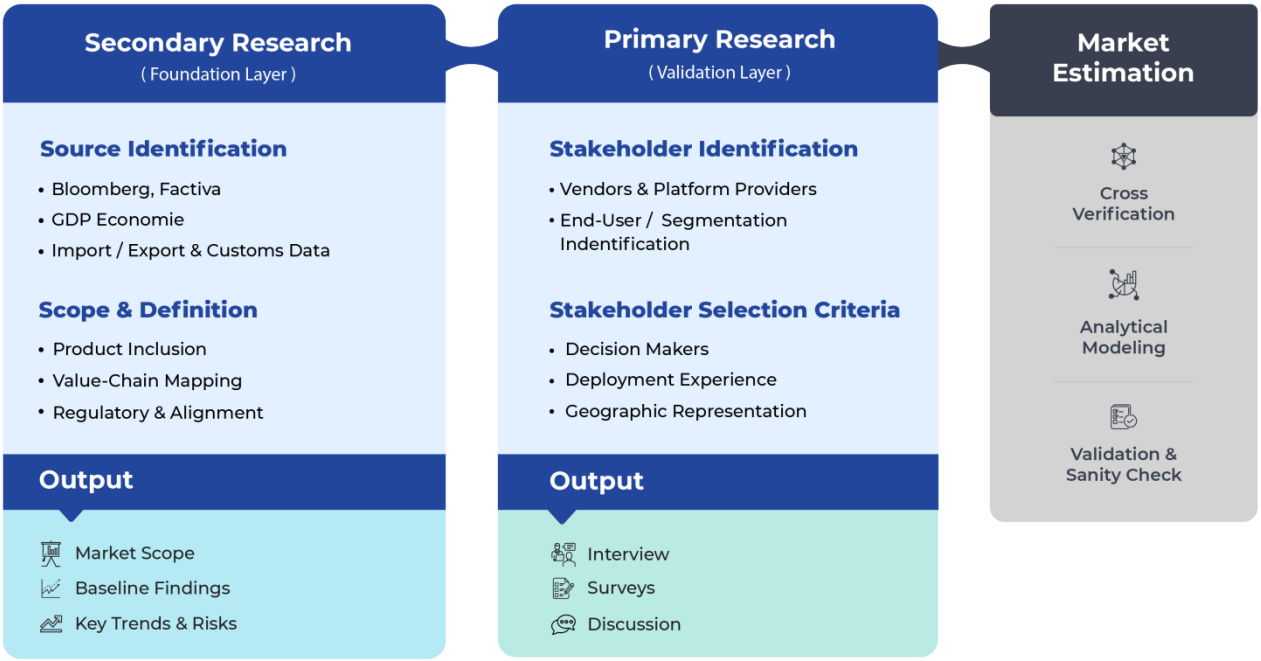
Source-grounded commercial interpretation is combined with the analyst-led qualitative challenge layer. The approach preserves a distinction between observed vessel characteristics, conditional explanations of buyer behavior, and conclusions that require separate quantitative support.

2.2. Research Design

The research design separates three questions: what a vessel is configured to do, what a buyer is procuring, and which infrastructure requirements could make that vessel relevant. Evidence answering one question does not automatically answer the others. A design description can establish an advertised configuration without establishing delivery, while an infrastructure project can establish an application context without establishing a vessel procurement.

Commercial comparisons are organized around the accepted vessel categories and buyer roles. Technical fit, procurement responsibility, construction pathway, and event status provide the boundaries for interpretation. The qualitative challenge layer tests explanations within those boundaries; quantitative conclusions require their own consistent supporting evidence.

Figure 2. Global Cable Laying Vessel Market, Research Design



2.2.1. Primary Research

The analyst team conducted primary research as a qualitative challenge layer for market definition, segmentation, demand conditions, adoption barriers, and competitive interpretation. This work tested analytical assumptions and sharpened explanations of market mechanisms without serving as standalone support for numerical estimates.

The qualitative challenge layer is evaluated alongside secondary evidence within the accepted market scope. It informs conditional market explanations and hypotheses for subsequent quantitative analysis. Numerical estimates require their own supporting evidence, and a forecast derived from a qualitative assumption does not independently validate that assumption. Final interpretation must reconcile the qualitative findings with the completed quantitative results.

2.2.2. Secondary Research

Secondary evidence is interpreted according to the proposition it establishes. Official builder descriptions support advertised design features, customization options, and mission-equipment provisions. Official vessel-owner disclosures support dated events and the configuration described for the owner's asset. Neither role should be extended into proof of a supplier's capability across the entire study taxonomy.

Intergovernmental technical materials provide context for positioning requirements and the parties involved in qualification. They do not replace vessel-specific documentation or contractual acceptance criteria. The distinction between a design provision, a delivered configuration, and an accepted procurement requirement is therefore central to the use of secondary evidence.

Sources & Evidence

1. The Damen CLV: a new generation of cable layer
   · Damen's article describes design features and client-specific provisions, illustrating the role of builder materials in establishing advertised configuration rather than procurement acceptance. ([damen.com](https://www.damen.com/insights-center/articles/the-damen-clv-a-new-generation-of-cable-layer))
2. Prysmian’s Cable Enterprise Ready for Sail Out Following Upgrade Works
   · The vessel-owner release identifies a dated conversion event and the configuration of its own asset, supporting the stated evidentiary role of owner disclosures. ([prysmian.com](https://www.prysmian.com/sites/www.prysmian.com/files/media/documents/PR_varo.pdf))
3. Efficient DP Operation
   · The IMO portal describes positioning requirements and variations in equipment functionality, supporting use of intergovernmental material for qualification context rather than vessel-specific acceptance. ([greenvoyage2050.imo.org](https://greenvoyage2050.imo.org/technology/efficient-dp-operation/))

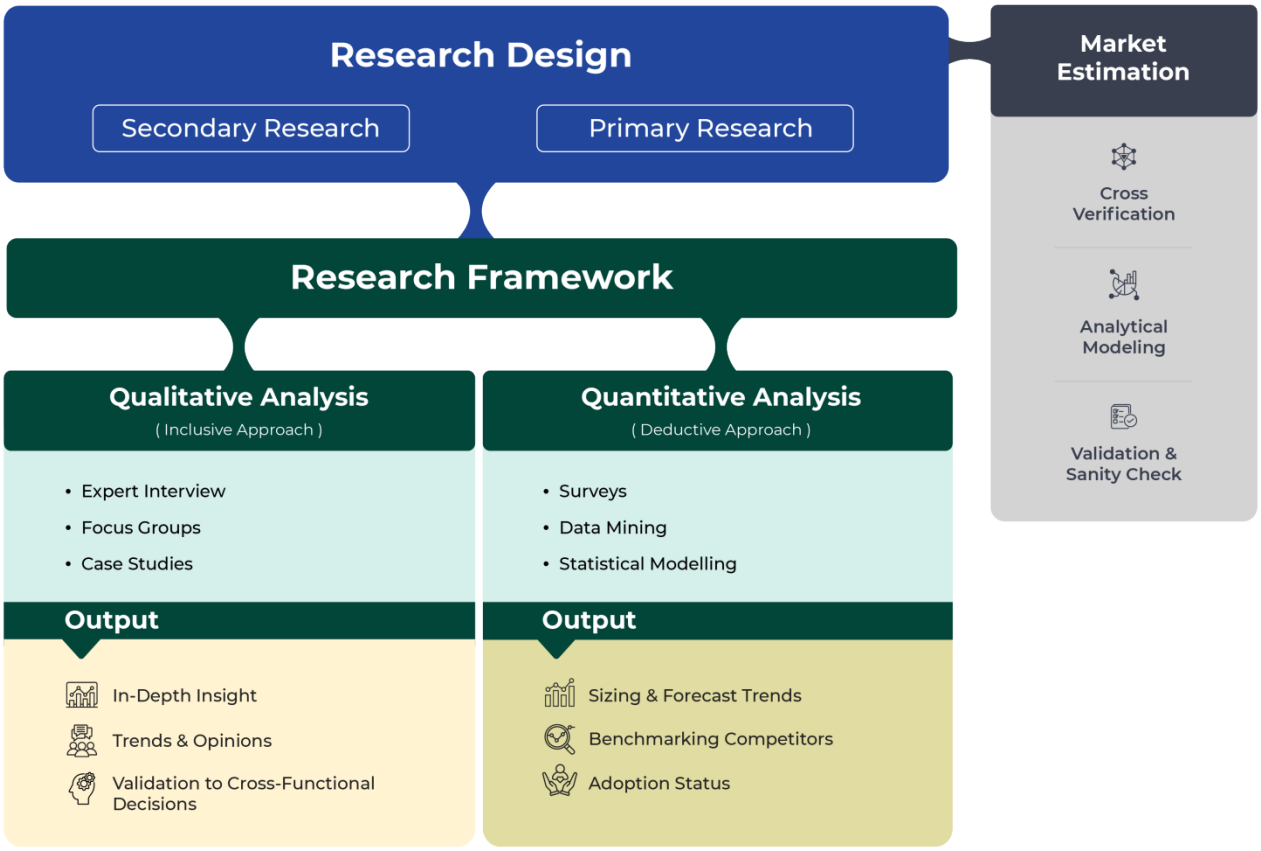
2.3. Research Framework

The framework connects the vessel definition to the accepted taxonomy, then relates the resulting configurations to buyers and infrastructure applications. Platform and construction pathway identify the physical offering; mission, compatibility, positioning, power, operating

envelope, payload, and depth describe its intended capability. Buyer and procurement structure identify who acquires the offering and how delivery responsibility is arranged.

Competitive interpretation should compare offerings within those boundaries. Participation in cable manufacture, marine contracting, infrastructure ownership, or equipment supply does not by itself establish the ability to deliver a qualifying vessel. Demand explanations must connect infrastructure requirements to a relevant buyer decision before they are used to support a commercial conclusion.

Figure 3. Global Cable Laying Vessel Market, Research Framework



2.3.1. Qualitative Analysis

The qualitative framework examines why a buyer could accept, reject, or require changes to a vessel offering. Relevant questions concern cable compatibility, mission configuration, suitability for the intended waters, positioning qualification, integration responsibility, and continuing support. Potential switching barriers are examined through compatibility and acceptance requirements rather than inferred from supplier incumbency or category membership.

Single-prime and buyer-managed delivery are compared through the allocation of responsibility for interfaces, certification, warranty coverage, and delivery acceptance. These are questions for commercial interpretation, not assumptions that either structure is

universally preferable. Explanations of supplier access remain conditional on the requirements of the particular buyer and vessel procurement.

2.3.2. Quantitative Analysis

Quantitative comparability requires a common vessel-offering boundary, a distinction between Newbuilds and Conversions, and consistent interpretation of the technical categories. A vessel's platform, mission, cable compatibility, positioning, power architecture, payload capability, and depth capability are separate attributes; their classifications cannot be added together as independent opportunities.

The historical, base, estimated, and forecast year roles must remain distinguishable. An order announcement, construction milestone, delivery, and entry into service describe different events and do not automatically establish the same timing basis. Geographic interpretation likewise needs to distinguish construction location, buyer location, ownership, and intended deployment rather than treating them as equivalent.

2.4. Market Size Estimation

Market measurement is bounded by the vessel offering rather than the full infrastructure project in which it operates. Newbuilds and Conversions are both included, but their transaction scopes require distinction: an existing hull, conversion work, mission equipment, and the resulting configured vessel are not automatically equivalent valuation objects.

Single-prime and buyer-managed packages can describe different contractual perimeters. Equipment or integration already included within a vessel package must not be treated as an additional independent offering. Cable manufacture, charter operations, and execution of installation or maintenance services remain distinguishable from procurement of the vessel itself.

2.4.1. Top-Down Approach

A top-down perspective is informative only where broader business activity can be related to the defined vessel offering. Shipbuilding, marine construction, cable-system supply, and infrastructure development provide context, but none is interchangeable with the Cable Laying Vessel boundary.

Integrated suppliers and contractors may participate in several adjacent activities. A broader business disclosure cannot be allocated to this market merely because the company owns cable-laying assets or serves a relevant infrastructure application. The relevant vessel construction or conversion activity must be distinguishable before the broader disclosure can inform a market comparison.

2.4.2. Bottom-Up Approach

A bottom-up perspective concerns the identity and scope of individual vessel procurements. Vessel-specific evidence must distinguish the platform and mission configuration from the construction pathway, buyer role, and contractual package. A conversion award should not automatically be interpreted as the full value of the resulting vessel.

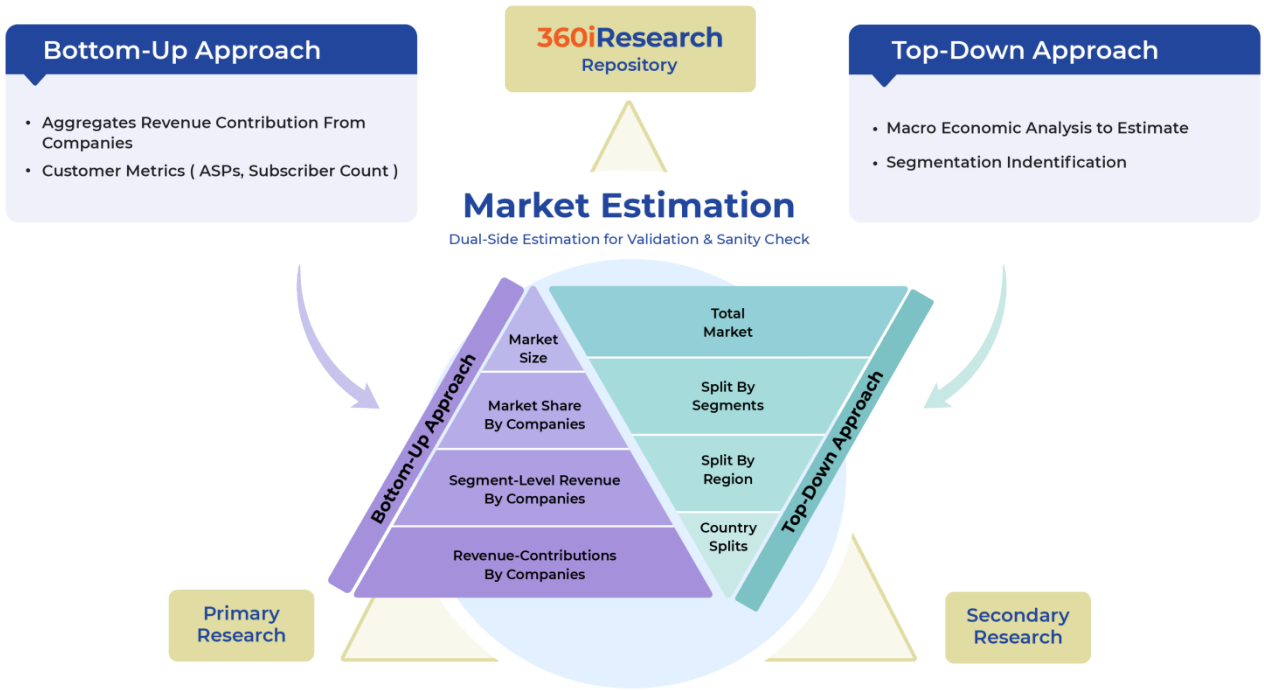
Announcements, construction milestones, and delivery disclosures may describe the same asset at different stages. Their interpretation must preserve that relationship rather than treat each disclosure as a separate procurement. Buyer-supplied equipment and separately contracted integration also require an explicit relationship to the finished vessel offering before records can be combined.

2.5. Data Triangulation

Technical descriptions, buyer disclosures, and dated construction records are complementary only when they concern the same vessel, configuration, procurement scope, and event status. Apparent disagreement may reflect customization, conversion, future design provision, or a different delivery milestone rather than an error that can be resolved by combining the statements.

Reconciliation should preserve those distinctions and narrow conclusions when the evidence does not establish equivalence. Repeated statements originating from the same announcement are not independent corroboration. Qualitative explanations can challenge the interpretation of the evidence, but they cannot independently validate a numerical conclusion.

Figure 4. Global Cable Laying Vessel Market, Data Triangulation



2.6. Research Outcomes

The intended outcome is a decision framework for vessel specification, buyer qualification, construction-pathway assessment, and allocation of procurement responsibilities. Buyers should be able to distinguish capabilities that are essential to their intended mission from optional design provisions. Builders, conversion yards, equipment providers, and vessel owners

should be able to assess how their offerings address those requirements without assuming access to every included application.

Commercial interpretation should explain the evidence needed before a procurement or investment commitment, the alternatives available, and the circumstances that would change a conclusion. Infrastructure relevance, category membership, demonstrated vessel capability, and contractual acceptance remain distinct considerations.

2.7. Research Assumptions

- The segmentation axes are independent descriptions of the same vessel offering. Inclusion of a category does not imply that every supplier can deliver every combination of platform, mission, cable family, positioning, power architecture, and operating envelope.
- Newbuild and conversion comparisons depend on explicit procurement scopes. Differences in the treatment of an existing hull, mission equipment, engineering, and integration change the interpretation of otherwise similarly described transactions.
- Payload and depth comparisons assume consistent category boundaries and equivalent capability definitions. A tier label is not a substitute for the specifications and acceptance conditions relevant to the buyer's intended mission.
- Procurement-structure comparisons assume that responsibility for vessel construction, mission-equipment interfaces, certification, warranty coverage, and delivery acceptance is established from the particular package rather than inferred from its label.
- Infrastructure activity is relevant to vessel demand only where a defensible connection exists to acquisition, conversion, or replacement decisions. Application relevance alone does not establish a vessel commitment.
- Forward-looking interpretation is conditional on infrastructure project realization, buyer procurement decisions, vessel delivery, and applicable deployment approvals. Delays, cancellations, or changes in project requirements could alter the commercial implications.

2.8. Research Limitations

- Design readiness does not establish delivered capability. A builder's description may reserve space for a higher DP class or future mission equipment; such provision must not be interpreted as an installed, certified, or contractually accepted configuration.
- Positioning categories do not resolve procurement qualification by themselves. DP equipment capabilities can differ between vessels, and requirements involve flag states, classification societies, and charterers; a particular vessel still needs to meet the applicable acceptance conditions.
- Payload and depth tiers are not self-sufficient evidence of vessel equivalence. Comparisons can be misleading when the underlying capability definitions or category boundaries differ, especially when a broad tier obscures the buyer's actual mission requirements.

- A vessel's configuration can change through conversion without changing its platform identity. Historical specifications and later descriptions therefore need to be associated with the configuration being assessed; the vessel name alone is insufficient for a like-for-like comparison.
- Procurement packages can differ in their inclusion of hull work, mission equipment, integration, and acceptance responsibilities. Apparent similarity between single-prime and buyer-managed arrangements does not establish equivalent transaction scope or risk allocation.

Sources & Evidence

1. The Damen CLV: a new generation of cable layer
   · Damen distinguishes preparation for DP2 installation from space reservation for DP3. This supports the analytical caution that design provision does not establish installed or accepted capability. ([damen.com](https://www.damen.com/insights-center/articles/the-damen-clv-a-new-generation-of-cable-layer))
2. Prysmian's Cable Enterprise Ready for Sail Out Following Upgrade Works
   · Cable Enterprise retained its barge identity while conversion changed its positioning configuration. The need to associate comparisons with the assessed configuration is an analytical implication of this example. ([prysmian.com](https://www.prysmian.com/sites/www.prysmian.com/files/media/documents/PR_varo.pdf))
3. Efficient DP Operation
   · The IMO portal states that DP functionality and capability vary between vessels and manufacturers. Treating a category label as insufficient proof of procurement acceptance is an analytical implication. ([greenvoyage2050.imo.org](https://greenvoyage2050.imo.org/technology/efficient-dp-operation/))

3. Executive Summary

3.1. Introduction

The global Cable Laying Vessel market is organized around accepted, employable cable-mission configurations rather than interchangeable hulls or infrastructure spending. Ships and barges serve installation, repair, and combined requirements across power, communications, sensing, and multiple cable families. Included categories do not establish that every configuration is commercially interchangeable. The acquiring supplier, contractor, or asset owner can also differ from the infrastructure customer purchasing cable-system delivery.

Project-linked investment, maintenance renewal, and existing-vessel modernization create distinct capital decisions. Nexans' vessel investment, Orange's announced maintenance replacements, and NKT Victoria's upgrades illustrate why additional cable work need not produce the same construction response. Buyers must distinguish the need for ownership, conversion, replacement, or qualified contractual access. Continuing employment and deployment permission remain separate from technical readiness: infrastructure commitments can reverse, and an accepted vessel does not authorize the complete cable-project activity package.

Sources & Evidence

1. Orange Marine modernizes its fleet of cable ships to secure digital infrastructure in Europe, Africa and the Middle East
   · Orange's November xx.xx 2025 announcement explicitly identifies replacement of existing maintenance ships, establishing a procurement purpose distinct from new installation campaigns. ([orange.com](https://www.orange.com/assets/document/xx.xx/download))
2. Ørsted to discontinue the Hornsea 4 offshore wind project in its current form
   · On May xx.xx 2025, Ørsted discontinued Hornsea xx.xx in its then-current form and terminated supply-chain contracts while retaining development rights. This establishes a dated commitment reversal, not a universal cancellation pattern. ([orsted.com](https://orsted.com/en/company-announcement-list/2025/xx.xx/orsted-to-discontinue-the-hornsea-xx.xx-offshore-wind-xx.xx))
3. NKT boosts offshore installation capabilities with upgrades of cable-lay vessel NKT Victoria
   · NKT's July xx.xx 2024 release describes completed NKT Victoria upgrades prompted by customer requirements, establishing modernization without replacement as a documented pathway. ([nkt.widen.net](https://nkt.widen.net/content/ct5bcrpb1f/pdf/NKT-upgrades-NKT-Victoria.pdf?u=gj0n1y))
4. Apply to lay cables
   · UK guidance distinguishes territorial cable laying, international cables outside territorial waters, and associated works that may require licensing. This supports separating project permission from vessel readiness without asserting a uniform global rule. ([gov.uk](https://www.gov.uk/guidance/marine-licensing-cables))
5. Dynamic positioning (DP)
   · DNV provides positioning assurance and charter-suitability assessment involving owners, customers, and charterers. This supports configuration-specific acceptance rather than reliance on a vessel label. ([dnv.com](https://www.dnv.com/services/dynamic-positioning-xx.xx/))

6. Nexans to build third generation cable laying vessel to drive global energy transition
   · Nexans' July xx.xx 2023 announcement links its vessel investment to project commitments and offshore-wind and interconnector requirements. This supports a purchaser-specific capital trigger, not automatic vessel acquisition from infrastructure activity.
   ([nexans.com](https://www.nexans.com/press-releases/nexans-to-build-third-generation-cable-laying-vessel-to-drive-global-energy-transition/))
7. Marine Resource Plan
   · NKT offers repair access through its own vessel, third-party vessels, and adaptable cable-handling equipment, supporting qualified contractual access as an alternative to some dedicated purchases.
   ([nkt.com](https://www.nkt.com/products-solutions/lifecycle-cable-services/repair/offshore/marine-resource-plan))

3.2. CXO Perspective

Integrated cable suppliers and installation contractors should align capital commitments with an accountable delivery perimeter. Prysmian's retained cable-equipment responsibility on Leonardo da Vinci contrasts with Ulstein's turnkey Electra delivery. Buyer-managed packages preserve equipment choice but require an empowered integration team, documented interfaces, and named responsibility for cross-system defects. Buyers lacking that capability should compare a qualified prime covering the relevant integration, acceptance, and support obligations; a turnkey label alone does not establish their transfer.

For competing builders, repeat VARD-Prysmian and Ulstein-Nexans relationships provide attributable qualification references, not exclusive account access. An entrant yard without comparable whole-vessel integration experience can pursue a bounded specialist-led package, as demonstrated by Royal IHC's construction arrangement with Pacific Shipbuilding for OMS. The specialist contributes platform engineering and mission equipment; the yard must still secure design-use rights and agree commissioning, warranty, and support responsibilities. This route trades independent offering control for complementary capability. Direct prime entry becomes defensible only when the bidder can substantiate those responsibilities itself.

Sources & Evidence

1. Ulstein Verft delivers the cable-laying vessel Nexans Electra
   · Ulstein describes responsibility for Electra's turnkey delivery, including outfitting and finalization, and identifies the earlier Aurora delivery relationship with Nexans. The record establishes a broader delivery comparator and repeat relationship, not exclusivity or every warranty obligation.
   ([ulstein.com](https://ulstein.com/news/ulstein-verft-delivers-the-cable-laying-vessel-nexans-electra))
2. Interview with Dario Brivio
   · Prysmian describes responsibility for Leonardo da Vinci's cable-laying equipment on a VARD naval platform. The example supports retained buyer package control; integration-team and defect-allocation requirements are conditional synthesis.
   ([prysmian.com](https://www.prysmian.com/en/insight/projects/interview-dario-brivio))
3. VARD secures contract for one cable laying vessel for Prysmian Group
   · VARD's November xx.xx 2022 announcement records a repeat Prysmian construction order following Leonardo da Vinci's delivery in 2021. This supports an attributable qualification reference, not exclusive access or guaranteed future awards.
   ([vard.com](https://www.vard.com/articles/vard-secures-contract-for-one-cable-laying-vessel-for-prysmian-group-xx.xx))

4. Dynamic positioning (DP)
   · DNV describes positioning as an integrated mechanical, electrical, and electronic network. Explicit cross-system responsibility and acceptance review are conditional procurement implications. ([dnv.com](https://www.dnv.com/services/dynamic-positioning-xx.xx/))
5. Construction begins on CS GENESIS and CS TRIUMPH for OMS Group
   · Royal IHC's OMS program combines its vessel platform and integrated mission equipment with construction at partner yard Pacific Shipbuilding in Vietnam. The bounded-entry recommendation retains customer qualification, design rights, commissioning, and support conditions. ([royalihc.com](https://www.royalihc.com/news/construction-begins-cs-genesis-and-cs-triumph-oms-group))

3.3. New Revenue Opportunities

The assessed revenue routes center on mission-matched power-cable vessels for committed supplier or contractor buyers, maintenance replacements preserving repair continuity, access-constrained barge platforms, and hull-specific conversion or upgrade integration. Readiness requirements can instead purchase qualified service access, so they do not automatically create vessel orders. The Opportunity Mapping section details these routes and their capture conditions. Sensing-exclusive and defense-linked capital commitments remain verification-led: cable-system standards and public planning do not establish an accepted vessel configuration or a funded acquisition.

Sources & Evidence

1. Conversion
   · DNV identifies inherited structures, potentially limited original documentation, and coordination among class, yard, and designer as conversion concerns. Hull-specific integration and approval screening are conditional commercial implications. ([dnv.com](https://www.dnv.com/services/ship-classification-fleet-in-service/conversion/))
2. Orange Marine modernizes its fleet of cable ships to secure digital infrastructure in Europe, Africa and the Middle East
   · The announced maintenance replacements support an identifiable repair-continuity opportunity rather than an unrestricted installation-vessel proposition. ([orange.com](https://www.orange.com/assets/document/xx.xx/download))
3. NKT boosts offshore installation capabilities with upgrades of cable-lay vessel NKT Victoria
   · The documented existing-vessel changes support an upgrade-integration opportunity distinct from a fresh hull purchase; repeat suitability is asset-specific. ([nkt.widen.net](https://nkt.widen.net/content/ct5bcrpb1f/pdf/NKT-upgrades-NKT-Victoria.pdf?u=gj0n1y))
4. Nexans to build third generation cable laying vessel to drive global energy transition
   · The announcement identifies Nexans as the vessel investor, supporting the assessed power-cable procurement theme where an explicit acquiring-party mandate exists. ([nexans.com](https://www.nexans.com/press-releases/nexans-to-build-third-generation-cable-laying-vessel-to-drive-global-energy-transition/))
5. IT Infinity - From PSV to State-of-the-Art Cable-Laying Vessel
   · VARD records IT Infinity's December 2024 delivery after conversion from a platform supply vessel to a telecommunications cable-laying vessel. This establishes a completed conversion pathway without guaranteeing suitability of another hull. ([vard.com](https://www.vard.com/cases/it-infinity))
6. Congressional Record - House, December 10, 2025: Report on Procurement Strategy for Submarine Cable Laying and Repair Ships
   · December xx.xx 2025 congressional explanatory text directs a Navy replacement-ship procurement strategy, capability review, and consideration of interim cable services. This is planning direction, not a vessel construction award. ([govinfo.gov](https://www.govinfo.gov/content/pkg/CREC-2025-xx.xx-xx.xx/pdf/CREC-2025-xx.xx-xx.xx-pt2-PgH5571-xx.xx.pdf))

7. Marine Construction Services | Caldwell Marine International
   · Caldwell's 2019 Potomac River account documents a sectional cable-lay barge selected for restricted bridge access. This supports the access-constrained platform theme, not current availability or a separate capital order. ([caldwellmarine.com](https://www.caldwellmarine.com/marine-construction-services/))
8. Marine Resource Plan
   · The Marine Resource Plan purchases repair readiness through alternative marine resources; the requirement does not itself establish a vessel acquisition. ([nkt.com](https://www.nkt.com/products-solutions/lifecycle-cable-services/repair/offshore/marine-resource-plan))
9. ITU-T G.9730.2: Scientific monitoring and reliable telecommunication submarine cable systems
   · ITU-T G.xx.xx defines communications cable systems incorporating scientific monitoring. Its system-level scope does not establish sensing-exclusive vessel acceptance or an acquiring-party capital mandate. ([itu.int](https://www.itu.int/rec/dologin_pub.asp?id=T-REC-G.xx.xx-xx.xx-I%xx.xx%21PDF-E&lang=e&type=items))

3.4. Next-Generation Business Models

Established repair-access models combine contracted vessel availability with compatible equipment, spares, and specialist support. NKT's adaptable handling offering also provides a route using suitable third-party vessels. These arrangements can satisfy defined repair requirements without dedicated acquisition, but do not establish unrestricted installation access or an unconditional restoration guarantee. Network owners should contract the coverage and priority they need rather than treat a service label as ownership-equivalent control.

Shared ownership and vertical integration remain separately conditional options. The Penta-Ocean-Fuyo agreement contemplates joint ownership after completion, requiring clear operating, employment, maintenance, and exit arrangements. DeepOcean and TFKable's September xx.xx 2026 proposed inter-array venture would combine cable manufacture and marine execution, but retains competition-approval, closing, and vessel-sanction dependencies. These structures can redistribute capital and delivery responsibilities; their announcements do not establish completed vessel capability or the final scope of prime accountability. Separately contracted supply and installation remain relevant alternatives.

Sources & Evidence

1. Subsea Cable Maintenance
   · Global Marine describes scheduled-cable maintenance, vessel and depot resources, separately contracted shore-related work, and approval controls on some outside assignments. These support contract-bounded repair access rather than unrestricted employment rights. ([globalmarine.co.uk](https://globalmarine.co.uk/services/subsea-cable-maintenance/))
2. Notice Regarding Joint Ownership of Large Work Vessels for Offshore Wind Construction
   · The January xx.xx 2025 Penta-Ocean-Fuyo basic agreement addresses construction responsibilities and post-completion vessel management and chartering, with joint ownership contemplated after completion. Employment-control and exit requirements are conditional transaction implications. ([penta-ocean.co.jp](https://www.penta-ocean.co.jp/english/updates/2025/xx.xx-xx.xx.html))

3. DeepOcean and TFKable Group to develop integrated inter-array cable offering with cable-laying vessel
   · The September xx.xx 2026 DeepOcean-TFKable announcement proposes an integrated inter-array venture and dedicated vessel, retaining competition approvals, closing requirements, and project-sanction milestones. The partners continue project-specific supply and installation services.
   ([deepoceangroup.com](https://www.deepoceangroup.com/articles/deepocean-and-tfkable-group-to-develop-integrated-inter-array-cable-offering-with-cable-laying-vessel))
4. Marine Resource Plan
   · NKT describes third-party vessel access, adaptable handling equipment, and a mobilization undertaking. The publication distinguishes that service proposition from unrestricted installation access or unconditional restoration.
   ([nkt.com](https://www.nkt.com/products-solutions/lifecycle-cable-services/repair/offshore/marine-resource-plan))

3.5. Industry Roadmap

During 2026-2027, procurement should distinguish commissioned assets from completion-dependent supply. Nexans identified Electra as fully commissioned in June 2026, while Eleonora's August 2026 outfitting milestone retained a first-half 2027 delivery target. Neither establishes a customer's reserved campaign window. European deployment adds a separate gate: offshore ships of at least xx.xx gross tonnage enter EU ETS coverage from the 2027 reporting period, subject to vessel classification and applicable voyage scope.

During 2028-2029, Orange's expected maintenance replacements and Global Marine's repair-vessel delivery scheduled for the fourth quarter of 2029 create service-transition dependencies. Owners should align vessel acceptance with operating teams, spares, and continuing maintenance obligations, retaining contingency access where these do not mature together.

During 2030-2032, existing-link renewal provides identifiable employment horizons, but not necessarily open vessel orders: Transpower's planned 2030-2031 Cook Strait upgrades already include contracted Prysmian marine delivery. Long-lived asset choices should preserve useful configuration options without equating readiness provision with accepted capability. Full-mission all-electric reliance requires vessel-specific duty and energy-access qualification; architecture labels alone do not resolve that question. The decisive milestones are accepted delivery, enforceable employment, completed service transitions, and usable energy arrangements.

Sources & Evidence

1. Orange Marine modernizes its fleet of cable ships to secure digital infrastructure in Europe, Africa and the Middle East
   · Orange expects the maintenance replacement deliveries in 2028 and 2029. These are announced targets; coordinating acceptance with continuing service is a conditional commercial implication.
   ([orange.com](https://www.orange.com/assets/document/xx.xx/download))
2. FAQ - Maritime transport in EU Emissions Trading System (ETS)
   · European Commission guidance states that offshore ships of at least xx.xx gross tonnage enter EU ETS coverage from the 2027 reporting period. Coverage is flag-neutral and route-based, requiring vessel- and voyage-specific applicability review.
   ([climate.ec.europa.eu](https://climate.ec.europa.eu/areas-action/transport-decarbonisation/reducing-emissions-shipping-sector/faq-maritime-transport-eu-emissions-trading-system-ets_en))

3. ABS Requirements for Hybrid and All-Electric Power Systems for Marine and Offshore Applications - April 2024

   · ABS's April 2024 requirements distinguish installed hybrid and all-electric arrangements from readiness notations. Readiness can concern future conversion, while all-electric arrangements require a vessel-specific mission description. The publication retains duty and energy-access qualification as unresolved verification requirements.
   ([ww2.eagle.org](https://ww2.eagle.org/content/dam/eagle/rules-and-guides/current/conventional_ocean_service/xx.xx-requirements-for-hybrid-electric-power-systems-for-marine-and-offshore-applications-2024/xx.xx-hybrid-electric-power-systems-reqts-Apr24.pdf))

4. CLV Nexans Electra: officially inaugurated

   · Nexans' June xx.xx 2026 announcement identifies Electra as fully commissioned following its June xx.xx inauguration and joining the operational fleet. It also identifies hybrid power; the milestone does not reserve a customer's campaign window or prove full-mission all-electric capability.
   ([nexans.com](https://www.nexans.com/news/clv-nexans-electra-officially-inaugurated/))

5. NKT Eleonora på plass hos VARD Brattvåg

   · Remøy's August xx.xx 2026 update records Eleonora at VARD Brattvåg for outfitting, integration, testing, and completion, with delivery planned for the first half of 2027. It establishes a completion-dependent milestone, not an accepted campaign allocation.
   ([remoy-management.no](https://remoy-management.no/news/nkt-eleonora-pa-plass-hos-vard-brattvag/))

6. Introducing Our Next-Generation Cable Maintenance Vessel

   · Global Marine's July xx.xx 2026 announcement establishes a signed maintenance-vessel construction contract with Colombo Dockyard and scheduled delivery in the fourth quarter of 2029. Its intended support of maintenance contracts grounds the conditional service-transition conclusion.
   ([globalmarine.co.uk](https://globalmarine.co.uk/introducing-our-next-generation-cable-maintenance-vessel/))

7. HVDC link upgrade programme

   · Transpower plans Cook Strait HVDC upgrades for 2030 and 2031 and identifies a June 2026 Prysmian contract including cable design, manufacture, delivery, vessel-based installation, and specialists. This establishes allocated marine-delivery scope, not a separate open vessel order.
   ([transpower.co.nz](https://www.transpower.co.nz/hvdc-upgrade))

4. Market Overview

4.1. Introduction

The global Cable Laying Vessel market is a specialized marine-asset business encompassing ships and barges built or converted for installation, repair, combined missions, and multipurpose cable-related construction. ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ Platform, station-keeping, onboard power, payload, and depth capability are independent suitability attributes, not additive opportunities or assurances that every configuration is commercially interchangeable.

Established vessel references coexist with continuing customization. Prysmian's Cable Enterprise conversion changed a moored cable-laying barge into a DP2 configuration without changing its barge identity, while Ulstein reported delivery of the DP3 Nexans Electra on May xx.xx 2026. ▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪

Figure 5. Global Cable Laying Vessel Market Size, 2017-2032

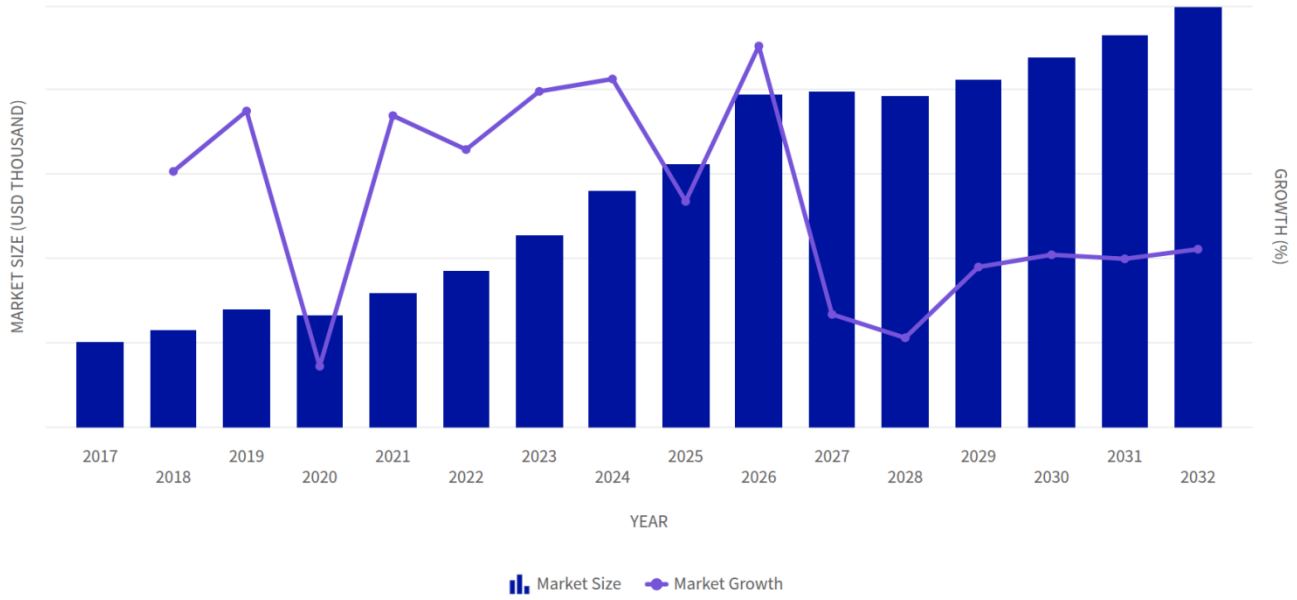


Table 2. Global Cable Laying Vessel Market Size, 2017-2032 (USD Thousand)

World	2023	2024	2025	2026	2027	2032	CAGR (%)
Global	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Sources & Evidence

1. Prysmian's Cable Enterprise Ready for Sail Out Following Upgrade Works
   · Prysmian's May 2015 release describes conversion from a moored cable-laying barge into a DP2 cable-laying barge.
   ([prysmian.com](https://www.prysmian.com/sites/www.prysmian.com/files/media/documents/PR_varo.pdf))
2. Ulstein Verft delivers the cable-laying vessel Nexans Electra
   · Ulstein reported delivery of the DP3 Nexans Electra on May xx.xx 2026.
   ([ulstein.com](https://ulstein.com/news/ulstein-verft-delivers-the-cable-laying-vessel-nexans-electra))

4.2. Key Growth Contribution

Committed offshore wind and interconnector delivery can motivate integrated cable suppliers to acquire vessels that give them control over marine execution, as Nexans' investment rationale demonstrates. Serving that adoption mechanism requires mission-equipment integration, accepted positioning and cable compatibility, and an operator able to support the asset. The constraint is that a changed requirement need not produce a newbuild: NKT Victoria's modernization demonstrates that an existing vessel can receive additional capability. Infrastructure activity becomes vessel demand only through an explicit acquisition, conversion, or replacement decision.

Figure 6. Global Cable Laying Vessel Market, Key Growth contribution, 2025-2032

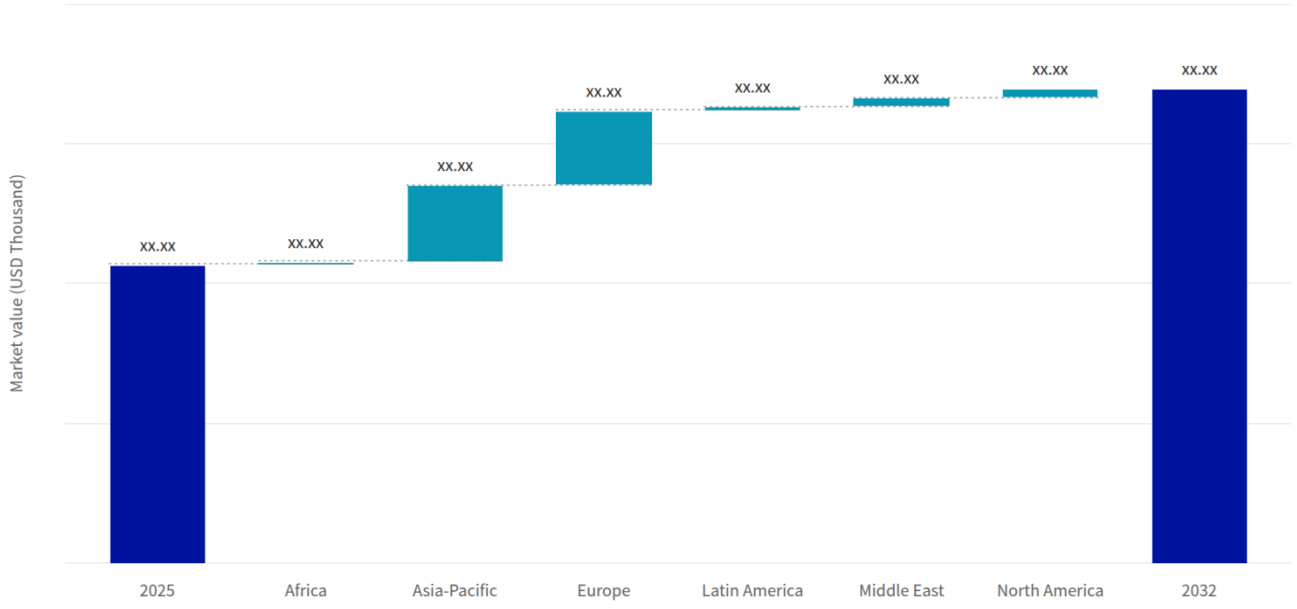


Table 3. Global Cable Laying Vessel Market, Key Growth Contribution, 2025-2032

Scope	Leading category	Added value (USD Thousand)	Growth share (%)	CAGR (%)
Global - Cable Compatibility	xx.xx	xx.xx	xx.xx	xx.xx
Global - Cable Payload Capacity	xx.xx	xx.xx	xx.xx	xx.xx
Global - Cable-Laying Depth Capability	xx.xx	xx.xx	xx.xx	xx.xx
Global - Construction Pathway	xx.xx	xx.xx	xx.xx	xx.xx
Global - Country	xx.xx	xx.xx	xx.xx	xx.xx
Global - Infrastructure Application	xx.xx	xx.xx	xx.xx	xx.xx
Global - Mission Configuration	xx.xx	xx.xx	xx.xx	xx.xx
Global - Onboard Power Architecture	xx.xx	xx.xx	xx.xx	xx.xx
Global - Operating Envelope	xx.xx	xx.xx	xx.xx	xx.xx
Global - Procurement Structure	xx.xx	xx.xx	xx.xx	xx.xx
Global - Region	xx.xx	xx.xx	xx.xx	xx.xx
Global - Station-Keeping System	xx.xx	xx.xx	xx.xx	xx.xx
Global - Vessel Buyer	xx.xx	xx.xx	xx.xx	xx.xx
Global - Vessel Platform	xx.xx	xx.xx	xx.xx	xx.xx

Sources & Evidence

1. NKT boosts offshore installation capabilities with upgrades of cable-lay vessel NKT Victoria
   · NKT's July xx.xx 2024 release describes completed NKT Victoria upgrades prompted by customer requirements, establishing modernization as an alternative to replacement. ([nkt.widen.net](https://nkt.widen.net/content/ct5bcrpb1f/pdf/NKT-upgrades-NKT-Victoria.pdf?u=gj0n1y))
2. Nexans to build third generation cable laying vessel to drive global energy transition
   · Nexans linked its July 2023 vessel investment to contracted offshore wind and interconnector work, supporting an employment-led acquisition mechanism rather than automatic demand from infrastructure announcements. ([nexans.com](https://www.nexans.com/press-releases/nexans-to-build-third-generation-cable-laying-vessel-to-drive-global-energy-transition/))

4.3. Industry Ecosystem & Value Chain Analysis

Value is created by integrating the marine platform with the cable-related mission and delivering an accepted asset. ■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■ ■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■ ■■ ■ ■■■■ ■■■■■ ■■■■■■■■■ ■■■■■ ■■■■■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■ ■■■■■■■■ ■■■ ■■■■■■ ■■■■■■■■■ ■■■■■

RESEARCH SAMPLE REPORT

[redacted] The buyer must identify responsibility for engineering interfaces, commissioning, acceptance, and post-delivery defects in the actual contract.

[redacted] A single prime can centralize the delivery obligation only where its contractual scope actually includes the relevant interfaces. The commercial trade-off is therefore control versus transferred accountability, rather than a presumption that either procurement structure always delivers better economics.

In maintenance, the asset supports a readiness proposition involving dedicated vessels, spare-plant depots, and mobilization obligations, as illustrated by Global Marine's service arrangements. [redacted] For a builder or lessor, those downstream obligations explain customer requirements and asset employment; they do not make installation-service or infrastructure revenues part of the vessel offering.

Sources & Evidence

1. Ulstein Verft delivers the cable-laying vessel Nexans Electra
   · Ulstein described turnkey vessel delivery, including outfitting and finalization; contractual accountability implications are analytical. ([ulstein.com](https://ulstein.com/news/ulstein-verft-delivers-the-cable-laying-vessel-nexans-electra))
2. Interview with Dario Brivio
   · Prysmian described responsibility for Leonardo da Vinci's cable-laying equipment on a VARD naval platform. ([prysmian.com](https://www.prysmian.com/en/insight/projects/interview-dario-brivio))
3. Subsea Cable Maintenance
   · Global Marine describes dedicated maintenance vessels, spare-plant depots, and contractual mobilization obligations. ([globalmarine.co.uk](https://globalmarine.co.uk/services/subsea-cable-maintenance/))

4.3.1. Supply-Side Analysis

[redacted] This illustrates a distributed construction network rather than a single-site product. Buyers should assess the delivery chain through final acceptance; hull progress alone does not establish readiness of the integrated cable-laying asset.

Conversion is a genuine supply pathway, but its suitability depends on the inherited vessel. [redacted] A buyer should compare the actual hull condition and approval scope with a purpose-built alternative rather than assuming that conversion is automatically simpler or faster.

Standardization can reduce repeated design work without eliminating mission customization. [redacted]

RESEARCH SAMPLE REPORT

[redacted] This applies across conventional, hybrid, and all-electric power architectures and across DP and non-DP positioning categories, all of which remain within the study.

Sources & Evidence

1. The Damen CLV: a new generation of cable layer
   · Damen describes client-specific modular mission equipment and distinguishes DP installation preparation from reserved space for a higher class.
   ([damen.com](https://www.damen.com/insights-center/articles/the-damen-clv-a-new-generation-of-cable-layer))
2. Prysmian's Cable Enterprise Ready for Sail Out Following Upgrade Works
   · The completed conversion changed positioning and propulsion capability while retaining the barge platform identity.
   ([prysmian.com](https://www.prysmian.com/sites/www.prysmian.com/files/media/documents/PR_varo.pdf))
3. VARD secures contract for one cable laying vessel for Prysmian Group
   · VARD allocated Prysmian vessel hull construction to Romania and final outfitting, commissioning, and delivery to Norway, with equipment subsidiaries participating.
   ([vard.com](https://www.vard.com/articles/vard-secures-contract-for-one-cable-laying-vessel-for-prysmian-group-xx.xx))
4. Conversion
   · DNV identifies inherited structures, potentially limited original documentation, and class-yard-designer coordination as conversion concerns.
   ([dnv.com](https://www.dnv.com/services/ship-classification-fleet-in-service/conversion/))

4.3.2. Demand-Side Analysis

The acquiring organization and the infrastructure customer frequently occupy different positions. NKT's January 2024 announcement paired a cable-laying-vessel order with expansion of its cable-production site, targeting both assets to become operational in 2027. [redacted]

[redacted] Repair-oriented demand has a different purchasing trigger: Orange's announced maintenance-ship replacements address continuity of an existing service role. Installation-focused and repair-focused buyers should therefore be evaluated against different employment obligations rather than a common infrastructure-project pipeline.

Owners and leasing companies must verify who will accept and employ the asset, while captive operators may prioritize assured access over discretionary third-party work. [redacted] Before acquiring a vessel, the

buyer should identify the contractual customer, mission acceptance conditions, and consequences of competing service commitments.

Sources & Evidence

1. NKT has placed order for new cable-laying vessel
   · NKT announced a placed vessel order in January 2024 alongside factory expansion, with both assets expected operational from 2027. These were announced targets. ([investors.nkt.com](https://investors.nkt.com/company-announcements/2024/nkt-has-placed-order-for-new-cable-laying-vessel/))
2. Orange Marine modernizes its fleet of cable ships to secure digital infrastructure in Europe, Africa and the Middle East
   · Orange's November xx.xx 2025 announcement identifies maintenance-ship replacements and expected deliveries in 2028 and 2029. ([orange.com](https://www.orange.com/assets/document/xx.xx/download))
3. Van Oord's cable-laying vessel Calypso makes its debut and is now fully operational
   · Van Oord reported Calypso fully operational on the Sofia offshore wind project in October 2024. ([vanoord.com](https://www.vanoord.com/drupal/media/data/default/2024-xx.xx/Press%20release%xx.xx-%20Van%20Oord%E2%xx.xx%99s%20cable-laying%20vessel%20Calypso%20makes%20its%20debut%20and%20is%20now%20fully%20operational%20_0.pdf))
4. Cable Security Fleet Program
   · The Cable Security Fleet sustains privately owned U.S.-registered vessels required to provide ships and services during national emergencies. ([fpi.omb.gov](https://fpi.omb.gov/program/xx.xx.html))

4.3.3. Stakeholder Analysis

[redacted] DNV's dynamic-positioning assurance services address owners, yards, contractors, customers, and charterers, reflecting the need to evaluate an integrated system rather than a category label. Technical acceptance should not be conflated with a customer's willingness to employ the vessel.

Coastal licensing authorities and affected interests control a separate project gate. [redacted] Buyers and operators should identify who must discharge project conditions and who bears the resulting scheduling exposure.

Public authorities can also purchase assured availability without owning the vessel. The U.S. [redacted]

Sources & Evidence

1. Apply to lay cables
   · MMO guidance distinguishes territorial cable laying, international cables outside territorial waters, and associated works requiring permission. ([gov.uk](https://www.gov.uk/guidance/marine-licensing-cables))
2. How to apply for a marine licence
   · MMO's standard licensing process includes public consultation and can produce conditional approval requiring further documentation. ([gov.uk](https://www.gov.uk/guidance/how-to-apply-for-a-marine-licence))
3. Dynamic positioning (DP)
   · DNV provides integrated DP assurance involving owners, yards, contractors, customers, and charterers. ([dnv.com](https://www.dnv.com/services/dynamic-positioning-xx.xx/))
4. Cable Security Fleet Program
   · Participating operators have public emergency-availability obligations alongside commercial activity. ([fpi.omb.gov](https://fpi.omb.gov/program/xx.xx.html))

4.4. Market Dynamics

[redacted] Repair replacement follows a separate mechanism: continuity of an established maintenance role can justify renewal without relying on a new installation campaign. These different triggers should not be collapsed into a single expansion thesis.

[redacted] Consequently, demand for cable-service availability can translate into vessel acquisition, conversion, mission-equipment procurement, or use of an existing compatible asset. Relevant monitoring signals are surviving project commitments, replacement contracts, accepted vessel delivery, and the actual scope of funded readiness arrangements-not policy announcements alone.

Sources & Evidence

1. Orange Marine modernizes its fleet of cable ships to secure digital infrastructure in Europe, Africa and the Middle East
   · The announced construction replaces existing maintenance assets, supporting a renewal mechanism distinct from new installation campaigns. ([orange.com](https://www.orange.com/assets/document/xx.xx/download))
2. Ørsted to discontinue the Hornsea 4 offshore wind project in its current form
   · Ørsted's May 2025 discontinuation demonstrates that previously awarded infrastructure work can be interrupted. ([orsted.com](https://orsted.com/en/company-announcement-list/2025/xx.xx/orsted-to-discontinue-the-hornsea-xx.xx-offshore-wind-xx.xx))
3. Nexans to build third generation cable laying vessel to drive global energy transition
   · Nexans linked its July 2023 newbuild decision to subsea project commitments and offshore wind and interconnection requirements. ([nexans.com](https://www.nexans.com/press-releases/nexans-to-build-third-generation-cable-laying-vessel-to-drive-global-energy-transition/))

4. Commission increases submarine cable security with €347 million investment and new toolbox
   · The February 2026 initiative supported adaptable submarine cable-repair modules stationed at ports or shipyards.
   ([digital-strategy.ec.europa.eu](https://digital-strategy.ec.europa.eu/en/news/commission-increases-submarine-cable-security-eu347-million-investment-and-new-toolbox))

4.4.1. Key Drivers

4.4.1.1. Contracted power-cable work creates an identifiable asset-procurement trigger

[redacted] Nexans linked its newbuild decision to subsea project commitments, and Van Oord reported Calypso working on the Sofia project in October 2024. The acquisition trigger remains conditional on mission fit and asset funding; awarded infrastructure work may instead be fulfilled with existing or chartered vessels.

Sources & Evidence

1. Van Oord's cable-laying vessel Calypso makes its debut and is now fully operational
   · Calypso's Sofia assignment connects contractor-owned vessel capability to an actual installation project.
   ([vanoord.com](https://www.vanoord.com/drupal/media/data/default/2024-xx.xx/Press%20release%xx.xx-%20Van%20Oord%E2%xx.xx%99s%20cable-laying%20vessel%20Calypso%20makes%20its%20debut%20and%20is%20now%20fully%20operational%20_0.pdf))
2. Nexans to build third generation cable laying vessel to drive global energy transition
   · The announcement connects vessel investment to the company's project workload; it does not establish that all infrastructure projects require new vessels.
   ([nexans.com](https://www.nexans.com/press-releases/nexans-to-build-third-generation-cable-laying-vessel-to-drive-global-energy-transition/))

4.4.1.2. Repair-fleet replacement creates demand distinct from new installation projects

Orange's November 2025 construction announcement explicitly identified replacement of existing maintenance ships, with deliveries expected in 2028 and 2029. Replacement and continuity of repair access can therefore trigger procurement independently of a new cable installation. [redacted]

Sources & Evidence

1. Orange Marine modernizes its fleet of cable ships to secure digital infrastructure in Europe, Africa and the Middle East
   · Replacement is explicit in the announcement; deliveries in 2028 and 2029 are expectations rather than completed events. ([orange.com](https://www.orange.com/assets/document/xx.xx/download))

4.4.1.3. Mission and energy requirements stimulate modernization without guaranteeing newbuild demand

NKT reported upgrades to NKT Victoria responding to customer requirements, while Van Oord's operational Calypso incorporates hybrid power and shore-supply capability. [redacted] However, an upgrade can satisfy the requirement without a replacement purchase; buyers should compare

accepted capability and the intended operating profile before selecting a construction pathway.

Sources & Evidence

1. Van Oord's cable-laying vessel Calypso makes its debut and is now fully operational
   · The operational vessel incorporates hybrid power, batteries, shore supply, and energy management. ([vanoord.com](https://www.vanoord.com/drupal/media/data/default/2024-xx.xx/Press%20release%xx.xx-%20Van%20Oord%E2%xx.xx%99s%20cable-laying%20vessel%20Calypso%20makes%20its%20debut%20and%20is%20now%20fully%20operational%20_0.pdf))
2. NKT boosts offshore installation capabilities with upgrades of cable-lay vessel NKT Victoria
   · NKT's July 2024 release describes NKT Victoria upgrades responding to customer requirements and adding installation and positioning capability. ([nkt.widen.net](https://nkt.widen.net/content/ct5bcrpb1f/pdf/NKT-upgrades-NKT-Victoria.pdf?u=gj0n1y))

4.4.1.4. Public resilience commitments create qualified procurement pathways

Public resilience programs create an additional budget pathway for assured cable-service access. The U.S. ■■■■■ ■■■■■■■■ ■■■■■ ■■■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■ ■■ ■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■ ■■■ ■■■■ ■■■■ ■■■■ ■■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■ ■■■■■■■■■■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■ ■■■■■■■■■■■ ■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■■■ ■ ■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■

Sources & Evidence

1. Cable Security Fleet Program
   · The program establishes a public budget pathway for qualified vessel availability, not an automatic newbuild requirement. ([fpi.omb.gov](https://fpi.omb.gov/program/xx.xx.html))
2. CEF-Digital second call for proposals to increase Europe's submarine cable repair capacities launched this year, investing a further EUR 40 million
   · The June 2026 call funds telecom cable-repair modules for public emergency-response organizations and requires compatible receiving vessels to be identified. ([hadea.ec.europa.eu](https://hadea.ec.europa.eu/news/cef-digital-second-call-proposals-increase-europes-submarine-cable-repair-capacities-launched-year-2026-xx.xx-18_en))

4.4.2. Key Restraints

4.4.2.1. Infrastructure commitments can reverse before marine execution

Infrastructure awards do not remove capital-allocation risk. In May 2025, Ørsted discontinued Hornsea xx.xx in its then-current form and terminated supply-chain contracts, citing financing, supply-chain, and execution concerns. ■■■■■■ ■■■■■■ ■■■■■■■ ■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■■ ■■■■■■■■■ ■■■■ ■■■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■ ■■ ■■■ ■■■■■■■ ■ ■■■■■■■■ ■■■■■■■■■■■

Sources & Evidence

1. Ørsted to discontinue the Hornsea 4 offshore wind project in its current form
   · Ørsted terminated Hornsea xx.xx supply-chain contracts, citing financing, supply-chain, and execution concerns while retaining development rights. ([orsted.com](https://orsted.com/en/company-announcement-list/2025/xx.xx/orsted-to-discontinue-the-hornsea-xx.xx-offshore-wind-xx.xx))

4.4.2.2. Readiness obligations restrict discretionary vessel deployment

[redacted] Such obligations constrain discretionary deployment. NKT's alternative repair-vessel options provide a counterforce, but operators still need to confirm that equipment compatibility and existing commitments permit the proposed assignment.

Sources & Evidence

1. Subsea Cable Maintenance
   · Maintenance arrangements dedicate vessels to callouts and require approval for certain outside work. ([globalmarine.co.uk](https://globalmarine.co.uk/services/subsea-cable-maintenance/))
2. Marine Resource Plan
   · NKT describes repair options using its own vessel, third-party vessels, and adaptable cable-handling equipment. ([nkt.com](https://www.nkt.com/products-solutions/lifecycle-cable-services/repair/offshore/marine-resource-plan))

4.4.2.3. Activity-specific permissions separate technical capability from commercial access

Vessel capability does not confer project authorization. [redacted] Buyers should establish the authorization perimeter before committing the vessel to a campaign calendar.

Sources & Evidence

1. Apply to lay cables
   · The guidance establishes activity-specific permission boundaries; extrapolation into a uniform global restriction is not supported. ([gov.uk](https://www.gov.uk/guidance/marine-licensing-cables))

4.4.3. Key Opportunities

4.4.3.1. Maintenance renewal with service continuity

Maintenance operators need replacement assets that preserve existing service commitments. [redacted] Builders can address mission-matched replacement and transition support, conditional on acceptance and continuing employment; combined laying capability does not establish unrestricted installation availability.

Sources & Evidence

1. Orange Marine modernizes its fleet of cable ships to secure digital infrastructure in Europe, Africa and the Middle East
   · Orange's November xx.xx 2025 announcement explicitly identifies replacement of existing maintenance ships, with deliveries expected in 2028 and 2029. ([orange.com](https://www.orange.com/assets/document/xx.xx/download))
2. Introducing Our Next-Generation Cable Maintenance Vessel
   · The vessel is intended for fiber-optic repair and phased fleet renewal supporting maintenance contracts, providing an identifiable operator investment mandate. ([globalmarine.co.uk](https://globalmarine.co.uk/introducing-our-next-generation-cable-maintenance-vessel/))

4.4.3.2. Specialist-led access to vessel construction

Yards without independently demonstrated cable-mission integration can pursue a specialist-led construction package. Royal IHC's OMS program supplies an evidenced model. ■■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■ ■■■ ■■■■■■■■■ ■■■■■ ■■■■■■■■ ■■■■■■■■■■■■

Sources & Evidence

1. Construction begins on CS GENESIS and CS TRIUMPH for OMS Group
   · Royal IHC's OMS program combines its vessel platform and integrated mission equipment with construction at Pacific Shipbuilding in Vietnam. ([royalihc.com](https://www.royalihc.com/news/construction-begins-cs-genesis-and-cs-triumph-oms-group))

4.4.3.3. Platforms for constrained access and nearshore handoffs

Restricted crossings and nearshore handoffs create platform needs that offshore ships may not address. Caldwell and TAMS document barge-based solutions. ■■■■■■■■ ■■■■■■ ■■■■■■■ ■ ■■■■■■■■ ■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■ ■■■■■■ ■ ■■■■■■■■■■ ■■■■■■■

Sources & Evidence

1. Marine Construction Services | Caldwell Marine International
   · Caldwell's 2019 Potomac reference describes a sectional cable-lay barge selected to accommodate restricted bridge clearance. ([caldwellmarine.com](https://www.caldwellmarine.com/marine-construction-services/))
2. Subsea Services | TAMS
   · TAMS documents nearshore work for LD Travocean using Robert Purnell with client-supplied positioning and cable equipment, followed by an offshore-vessel handover. ([tamsgroup.com.au](https://www.tamsgroup.com.au/capabilities/subsea-services/))

4.4.3.4. Existing-asset mission upgrade and integration

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Sources & Evidence

1. Conversion
   · DNV identifies inherited structures, limited original documentation, and class-yard-designer coordination as conversion concerns. ([dnv.com](https://www.dnv.com/services/ship-classification-fleet-in-service/conversion/))
2. NKT boosts offshore installation capabilities with upgrades of cable-lay vessel NKT Victoria
   · The upgrades changed positioning and cable-installation capabilities on an existing vessel; they do not establish repeat suitability for another hull. ([nkt.widen.net](https://nkt.widen.net/content/ct5bcrpb1f/pdf/NKT-upgrades-NKT-Victoria.pdf?u=gj0n1y))
3. IT Infinity - From PSV to State-of-the-Art Cable-Laying Vessel
   · IT Infinity establishes a completed existing-platform capital pathway, not merely temporary mission-equipment mobilization. ([vard.com](https://www.vard.com/cases/it-infinity))

4.4.4. Key Challenges

4.4.4.1. Package interfaces require explicit delivery accountability

A cable-laying vessel may combine a yard-supplied platform with buyer-responsible mission equipment, as Prysmian described for Leonardo da Vinci. ■■■ ■■■■■■■■ ■■■■■■■■■ ■■ ■■■■■■■■■■ ■■■■ ■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■ Buyers and primes should establish responsibility for interface changes, integrated acceptance, and defect resolution before award; neither a single-prime label nor a complete hull demonstrates that these obligations have been covered.

Sources & Evidence

1. Interview with Dario Brivio
   · The described division of platform and equipment responsibility supports the need to establish package-interface accountability. ([prysmian.com](https://www.prysmian.com/en/insight/projects/interview-dario-brivio))

4.4.4.2. Conversions must reconcile inherited assets with the intended acceptance scope

DNV identifies inherited structures, potentially incomplete documentation, and coordination of class and statutory requirements as conversion concerns. These issues can affect the approval schedule and the suitability of the resulting cable-laying asset. ■■■■■■■■■■ ■■■■■■ ■■■■■■ ■■■■■■ ■■■ ■■■■■■■■■■■■■■■ ■■■■■■ ■■■ ■■■■■■ ■■■■■■■■■■ ■■■■■ ■■■■■■ ■■■■■■ ■■ ■■■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■ ■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■ ■■■ ■■■■■■■■■ ■■■■■ ■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■

Sources & Evidence

1. Conversion
   · DNV describes establishing class involvement, required documentation, and an approval schedule for conversions. ([dnv.com](https://www.dnv.com/services/ship-classification-fleet-in-service/conversion/))

4.4.4.3. Repair readiness depends on more than possession of a suitable vessel

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This is a service-delivery challenge rather than proof of a universal vessel shortage. Repair buyers should distinguish a mobilization undertaking from an unconditional restoration promise and verify crew continuity, competing commitments, and the scope of contingency support.

Sources & Evidence

1. Subsea telecommunications cables: resilience and crisis preparedness
   · Primary evidence presented to the parliamentary inquiry identifies transit, weather, concurrent repair needs, and continued integration of specialist skills as repair dependencies. No excluded fleet-scarcity estimates are used.
   ([committees.parliament.uk](https://committees.parliament.uk/publications/xx.xx/documents/xx.xx/default/))

4.4.4.4. Power-architecture labels must be separated from mission and compliance evidence

Damen's hybrid design describes electrical sailing for short periods, which is not evidence of an all-electric vessel's complete mission capability. Architecture comparisons require verification against the intended duty and accepted configuration. ■■ ■■■■■■■■■■ ■■■ ■■■■■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■ ■■■■■■ ■■ ■■■■■■ ■■■ ■■■■■■ ■■■■■■■■■■■■■■ ■■■■■■■ ■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■ ■■■■■■■■ ■■ ■■■■■■■■■■■■ ■■■■■ ■■ ■■■■■ ■■ ■■■■■■■■

Sources & Evidence

1. The Damen CLV: a new generation of cable layer
   · Damen's proposed hybrid arrangement includes electrical sailing for short periods, not a demonstrated complete all-electric mission.
   ([damen.com](https://www.damen.com/insights-center/articles/the-damen-clv-a-new-generation-of-cable-layer))
2. FAQ - Maritime transport in EU Emissions Trading System (ETS)
   · European Commission guidance establishes ship- and voyage-specific monitoring and ETS applicability.
   ([climate.ec.europa.eu](https://climate.ec.europa.eu/areas-action/transport-decarbonisation/reducing-emissions-shipping-sector/faq-maritime-transport-eu-emissions-trading-system-ets_en))

4.5. Porter’s Five Forces Analysis

Competitive rivalry is configuration-specific rather than a contest among interchangeable hulls. VARD's repeat cable-laying-vessel order from Prysmian illustrates the commercial relevance of an established delivery relationship, without establishing market dominance. ■ ■■■■■■■■■ ■■■■■■■ ■■■■ ■■■■■■■■■■■ ■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■ ■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■ ■■■■■■■ ■■■■■■■■■■■■■■ ■■■■■■■■■ ■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■

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Supplier leverage arises at interfaces that cannot be replaced independently without reconsidering the integrated vessel. DNV describes dynamic positioning as an interconnected mechanical, electrical, and electronic system subject to assurance requirements. ■■■■ ■■■■■ ■■■■■■■ ■■■■■■■■■■■■ ■ ■■■■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■ ■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■ ■■■ ■■■■■■ ■■■■■■■■■■ ■■ ■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■ ■■■■■■ ■■■ ■■■■■■ ■■■ ■■■■■■ ■■■■ ■■■■■■■■ ■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■ ■■■■■■■■■ ■■ ■■■■■■■■■■■ ■■■■■■■■■■■■

Entry barriers extend beyond access to a hull. A new builder or conversion provider must establish the relevant design, integration, documentation, and acceptance capability. ■■■■■■■■■■ ■■■■■■■ ■■ ■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■ ■■■ ■■■■■ ■■■■■■■■ ■■■■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■ ■■■ ■■ ■■■■ ■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■ ■■■■■ ■■■■■■■■ ■■■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■ ■■■ ■■ ■■■■■■■■■■■ ■■■■■ ■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■■■■■■■■■

Substitutes to purchasing a dedicated vessel exist within particular missions. NKT offers power-cable repair access through its own vessel, third-party vessels, and adaptable handling equipment; EU support for adaptable repair modules provides another equipment-led approach. ■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■ ■■■■ ■■■■ ■ ■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■ ■■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■ ■■■■■■■■ ■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■ ■■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■■

Sources & Evidence

1. Interview with Dario Brivio
   · Buyer responsibility for mission equipment demonstrates retained equipment control; leverage and coordination implications are analytical.
   ([prysmian.com](https://www.prysmian.com/en/insight/projects/interview-dario-brivio))
2. VARD secures contract for one cable laying vessel for Prysmian Group
   · VARD announced a repeat Prysmian cable-laying-vessel order following Leonardo da Vinci; this establishes a delivery relationship, not market dominance.
   ([vard.com](https://www.vard.com/articles/vard-secures-contract-for-one-cable-laying-vessel-for-prysmian-group-xx.xx))
3. Conversion
   · Conversion retains documentation and approval requirements; treating it as no automatic reduction in entry barriers is an analytical implication.
   ([dnv.com](https://www.dnv.com/services/ship-classification-fleet-in-service/conversion/))
4. Marine Resource Plan
   · NKT's options establish mission-specific alternatives to acquiring a dedicated repair vessel, not universal equivalence.
   ([nkt.com](https://www.nkt.com/products-solutions/lifecycle-cable-services/repair/offshore/marine-resource-plan))
5. Dynamic positioning (DP)
   · DNV describes interconnected mechanical, electrical, and electronic DP systems and associated assurance requirements; sourcing implications are analytical.
   ([dnv.com](https://www.dnv.com/services/dynamic-positioning-xx.xx/))

6. Commission increases submarine cable security with €347 million investment and new toolbox
   · Equipment-led repair support provides a potential alternative to dedicated vessel purchase; actual compatibility and outcomes remain conditions.
   ([digital-strategy.ec.europa.eu](https://digital-strategy.ec.europa.eu/en/news/commission-increases-submarine-cable-security-eu347-million-investment-and-new-toolbox))

4.6. PESTLE Analysis

Security policy changes both the purpose of vessel availability and the identity of the paying customer. ■■■ ■■■■ ■■■■■ ■■■■■■■■ ■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■ ■■■■■■■■■■■■■■■■ ■■■■■■■ ■■■■■ ■■■■■■■■■ ■■■■ ■■■■■■■ ■■■■■ ■■■ ■■■■■■■■■ ■■■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■ ■■■■ ■■■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■■ ■■■■ ■■ ■■■■■■■■■■■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■■■ ■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■ Commercial suppliers should distinguish supplying equipment to an eligible public buyer from obtaining support for their own vessel ownership.

■■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■ ■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■ ■ ■■■■■■■■■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■ ■■■■■ ■■■■■■■■ ■■ ■■■■■ ■■■■■■■■■■■■■■■■■■ ■■■■ ■■■■■■■ ■■■■■■■ ■■■■■■■■■■ ■■ ■■■■ ■■■■■■■■■■■ ■■■■■■■ ■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■ ■■■■■■ ■■■■■■■■■■■■■■■ ■■■ ■■■■■ ■■■■■■■■■■■■ A shipyard importing components into the United States should establish the treatment of those imports rather than applying a single assumed tariff to an internationally constructed vessel. Construction location, component origin, contractual responsibility, and the applicable entry rules determine the exposure.

Environmental regulation affects both asset selection and operating responsibilities. ■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■ ■■ ■■■■■ ■■■■■■■■ ■■■■■ ■■ ■■ ■■■■■ ■■■■■ ■■■■■ ■■■■■■■ ■■■■■ ■■■ ■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■ ■■■■ ■■■■■ ■■■■■■■ ■■■■ ■■■■■■■■■ ■■■■■■ ■■■ ■■■■■■ ■■■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■■■■■■■ ■■ ■■■■■■■■■ ■■■■■■■■■■ These requirements do not establish a universal mandate for all-electric cable-laying vessels.

■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■ ■■ ■■■ ■■■ ■■■■■ ■■■■■■ ■■■■ ■■■■■■■■■■ ■■ ■■■ ■■■ ■■■ ■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■ ■■■■■■ ■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■ ■■■■ ■■■■■■■■ For cable-project customers and vessel operators, unresolved conditions can separate ship readiness from project readiness. Procurement calendars should therefore retain explicit authorization dependencies rather than treating a completed vessel as sufficient evidence that an installation campaign can proceed.

Technology differentiation also requires equipment-level intellectual-property diligence. ■■■■■■■■ ■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■ ■■ ■■■ ■■■■■ ■■■■■■■■ ■ ■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■ ■■ ■■■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■ ■■■■■■ ■■■■■■■ ■■ ■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■ ■■■ ■■■ ■■■■■■■■ ■■■■ ■■■ ■■■■■■ ■■ ■■■ ■■■■■■■■■■■■■■■■■■■ ■■■■■■■ The application publication alone does not establish present enforceability, freedom to operate, or commercial superiority; designers and buyers should verify the relevant rights before committing to a proprietary arrangement.

Sources & Evidence

1. Ørsted to discontinue the Hornsea 4 offshore wind project in its current form
   · The discontinued project illustrates transmission of financing and execution concerns into infrastructure capital decisions. ([orsted.com](https://orsted.com/en/company-announcement-list/2025/xx.xx/orsted-to-discontinue-the-hornsea-xx.xx-offshore-wind-xx.xx))
2. How to apply for a marine licence
   · MMO may require discharge of conditions before activity begins, supporting a distinction between vessel readiness and project authorization. ([gov.uk](https://www.gov.uk/guidance/how-to-apply-for-a-marine-licence))
3. Cable Security Fleet Program
   · U.S. registration and emergency-service obligations are explicit program features. ([fpi.omb.gov](https://fpi.omb.gov/program/xx.xx.html))
4. CEF-Digital second call for proposals to increase Europe's submarine cable repair capacities launched this year, investing a further EUR 40 million
   · Eligible applicants have an emergency-response mandate; funding concerns modular equipment rather than unrestricted commercial vessel ownership. ([hadea.ec.europa.eu](https://hadea.ec.europa.eu/news/cef-digital-second-call-proposals-increase-europes-submarine-cable-repair-capacities-launched-year-2026-xx.xx-18_en))
5. FAQ - Maritime transport in EU Emissions Trading System (ETS)
   · MRV coverage expanded to qualifying offshore ships in 2025; offshore ships of at least xx.xx gross tonnage enter ETS coverage from 2027. ([climate.ec.europa.eu](https://climate.ec.europa.eu/areas-action/transport-decarbonisation/reducing-emissions-shipping-sector/faq-maritime-transport-eu-emissions-trading-system-ets_en))
6. Notice of Technical Corrections to the Harmonized Tariff Schedule of the United States for Duties Imposed by Presidential Proclamation 11021
   · The Commerce notice clarifies that the referenced metals duties concern imported aluminum, steel, or copper articles and derivatives through specified tariff provisions. Component exposure is an analytical application. ([public-inspection.federalregister.gov](https://public-inspection.federalregister.gov/2026-xx.xx.pdf))
7. Fact Sheet: President Donald J. Trump Updates Tariffs on Steel, Aluminum, and Copper Imports
   · The June xx.xx 2026 announcement describes metals tariff adjustments differentiated by equipment category and eligibility conditions; it does not establish a universal cable-vessel tariff. ([whitehouse.gov](https://www.whitehouse.gov/fact-sheets/2026/xx.xx/fact-sheet-president-donald-j-trump-updates-tariffs-on-steel-aluminum-and-copper-imports/))
8. European Patent Application EP4371919A1: Cable carousel for heavy-duty electric cable or umbilical
   · The original European patent application EP4371919A1, published May xx.xx 2024, concerns a cable carousel for heavy-duty electric cable or umbilical. Current enforceability is not established by this document. ([patentimages.storage.googleapis.com](https://patentimages.storage.googleapis.com/f0/d4/e8/b63d315361c094/EP4371919A1.pdf))

4.7. Market Outlook

The global outlook through 2032 supports selective, mission-led commitment rather than an assumption of uninterrupted fleet expansion. Installation employment, maintenance continuity, and public repair readiness can produce different asset decisions. ■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■ ■■ ■■■■■■■ ■ ■■■■■■ ■■■■■■■■■■ ■■■■■■■ ■■ ■■■■■■■■ ■■■■■■ ■■■■■■■■■■ ■■ ■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■■ ■■■■■■ ■■■■■■■■■■■■ ■■■ ■■ ■■■■■■■■■■■■■■■■■■ ■■■■■■ ■■■■■■■ ■■■■■■■■■■■ ■■■■ ■■■■■■■■ ■■■■■■■■ ■■ ■■■■■■■■■ ■■■■ ■■■ ■■■■■■■■ ■ ■■■■■■■■■ ■■■■■■■■■

The favorable scenario requires continuing employment commitments, completed acceptance, and executable access to support and deployment permissions. ■ ■■■■■■ ■■■■■■■■ ■■■■■■ ■■■■■■ ■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■■ ■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■ ■■ ■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■ ■■■■ ■■■■■■■■ ■■■■■■■ ■ ■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■ ■ ■■■■■■■■■■ ■■■ ■■■ ■■■■■■■■■■ Builders and financiers should therefore monitor procurement decisions and acceptance milestones separately from cable-project announcements.

Sources & Evidence

1. Ørsted to discontinue the Hornsea 4 offshore wind project in its current form
   · Ørsted's May xx.xx 2025 Hornsea xx.xx decision terminated supply-chain contracts while retaining development rights, demonstrating project-commitment reversal before execution. ([orsted.com](https://orsted.com/en/company-announcement-list/2025/xx.xx/orsted-to-discontinue-the-hornsea-xx.xx-offshore-wind-xx.xx))
2. CEF-Digital second call for proposals to increase Europe's submarine cable repair capacities launched this year, investing a further EUR 40 million
   · HaDEA's June xx.xx 2026 call funds telecommunications repair modules for eligible public emergency-response organizations and requires compatible receiving vessels to be identified. ([hadea.ec.europa.eu](https://hadea.ec.europa.eu/news/cef-digital-second-call-proposals-increase-europes-submarine-cable-repair-capacities-launched-year-2026-xx.xx-18_en))
3. Marine Resource Plan
   · NKT offers offshore repair access through its own vessel, third-party vessels, and adaptable cable-handling equipment, establishing mission-bounded alternatives to dedicated acquisition. ([nkt.com](https://www.nkt.com/products-solutions/lifecycle-cable-services/repair/offshore/marine-resource-plan))

4.7.1. Near-Term Market Outlook (0-2 Years)

During 2026-2027, the commercial distinction is accepted operating capability versus completion-dependent supply. Nexans identified Electra as fully commissioned in June 2026. ■■■■■■■■■■ ■■■■■■ ■■■■ ■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■ ■ ■■■■■■■■■■ ■■■■ ■■■■■■■■ ■■■■■■■ ■■■■■ ■■ ■■■■■■■ ■■ ■■■■■■■ ■■■ ■■■■■ ■■■■■■ ■■■■■■■ ■ ■■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■ ■■■ ■■■■■■ ■■■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■ ■■ ■■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■ ■■■■■■■■ ■■■■■■■ ■■■■■ ■■ ■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■■■■ ■■■■■■ ■■■■ ■■■■■■■ ■■■■■■■ ■■■■ ■■■■■■■■■■

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Sources & Evidence

1. FAQ - Maritime transport in EU Emissions Trading System (ETS)
   · European Commission guidance states that offshore ships of at least xx.xx gross tonnage enter EU ETS coverage from the 2027 reporting period; coverage is flag-neutral and route-based. ([climate.ec.europa.eu](https://climate.ec.europa.eu/areas-action/transport-decarbonisation/reducing-emissions-shipping-sector/faq-maritime-transport-eu-emissions-trading-system-ets_en))
2. CLV Nexans Electra: officially inaugurated
   · Nexans' June xx.xx 2026 announcement identifies Electra as fully commissioned following its June xx.xx inauguration and joining its operational fleet. ([nexans.com](https://www.nexans.com/news/clv-nexans-electra-officially-inaugurated/))
3. NKT Eleonora på plass hos VARD Brattvåg
   · Remøy's August xx.xx 2026 update places Eleonora at VARD Brattvåg for outfitting and integration, with delivery planned for the first half of 2027. ([remoy-management.no](https://remoy-management.no/news/nkt-eleonora-pa-plass-hos-vard-brattvag/))
4. Construction begins on CS GENESIS and CS TRIUMPH for OMS Group
   · The December xx.xx 2025 construction announcement schedules CS GENESIS for 2027 and CS TRIUMPH for 2028; these remain planned deliveries. ([royalihc.com](https://www.royalihc.com/news/construction-begins-cs-genesis-and-cs-triumph-oms-group))

4.7.2. Medium-Term Market Outlook (3-5 Years)

[illegible] These commitments identify delivery dependencies, not unrestricted future availability. Owners should synchronize replacement acceptance with operating-team, spares, and service-transition obligations, retaining a contingency where those elements do not mature together.

[illegible] Independent installers should examine actually available package scope rather than presume exclusion by proposed integration. Buyers should compare enforceable prime accountability with separately contracted supply and installation; existing project-specific routes remain relevant until the proposed structure is established.

Sources & Evidence

1. Orange Marine modernizes its fleet of cable ships to secure digital infrastructure in Europe, Africa and the Middle East
   · The replacement program retains established Italian and South African maintenance roles; announced delivery dates are not completed replacements. ([orange.com](https://www.orange.com/assets/document/xx.xx/download))
2. Introducing Our Next-Generation Cable Maintenance Vessel
   · Global Marine's July xx.xx 2026 announcement establishes a signed maintenance-vessel construction contract with Colombo Dockyard and scheduled delivery in the fourth quarter of 2029. ([globalmarine.co.uk](https://globalmarine.co.uk/introducing-our-next-generation-cable-maintenance-vessel/))

3. DeepOcean and TFKable Group to develop integrated inter-array cable offering with cable-laying vessel
   · DeepOcean and TFKable's September 2026 announcement plans progressive inter-array integration through 2029, subject to competition approval, closing, and vessel-sanction milestones. ([deepoceangroup.com](https://www.deepoceangroup.com/articles/deepocean-and-tfkable-group-to-develop-integrated-inter-array-cable-offering-with-cable-laying-vessel))
4. Steel Strike Milestone for Heavy Lift Vessel (HLV) and Cable Laying Vessel (CLV)
   · Penta-Ocean's fabrication announcement identifies PaxOcean's Batam yard and schedules cable-vessel completion and delivery for February 2028. The date is an announced target. ([penta-ocean.co.jp](https://www.penta-ocean.co.jp/english/updates/2025/xx.xx.html))

4.7.3. Long-Term Market Outlook (5-10 Years)

During 2030-2032, existing-link replacement provides a concrete planning horizon distinct from speculative new infrastructure. ■■■■■■■■■■■■ ■■■■ ■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■ ■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■ ■ ■■■■ ■■■ ■■■■ ■■■■■■ ■■ ■■■■■■■■ ■■■■ ■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■ ■■ ■■■■■■ ■■■■■■■■■ ■■■ ■■ ■■■■■■■■■■■■■ ■■■■ ■■■■■■ ■■■■■■ Builders must identify a separate acquiring-party requirement; contractors pursuing complementary work must verify which scopes remain available rather than infer access from the project's long horizon.

Long-lived assets should preserve useful configuration options without treating readiness provision as completed capability. ■■■ ■■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■ ■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■■■■■■ ■■■■■■■ ■■ ■■■■■■■ ■■■■■■■ ■■■■■■ ■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■■■■■ ■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■ ■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■ ■■■■ ■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■ ■■ ■ ■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■■■■■ A simpler established configuration is preferable where additional options lack accepted employment or usable energy access.

Sources & Evidence

1. ABS Requirements for Hybrid and All-Electric Power Systems for Marine and Offshore Applications - April 2024
   · ABS's April 2024 requirements distinguish installed hybrid and all-electric arrangements from ready notations, supporting separate architecture and mission-readiness qualification. ([ww2.eagle.org](https://ww2.eagle.org/content/dam/eagle/rules-and-guides/current/conventional_ocean_service/xx.xx-requirements-for-hybrid-electric-power-systems-for-marine-and-offshore-applications-2024/xx.xx-hybrid-electric-power-systems-reqts-Apr24.pdf))
2. HVDC link upgrade programme
   · Transpower identifies a June 2026 Prysmian contract covering cable design, manufacture, vessel-based installation, and specialist personnel, within planned 2030-2031 HVDC upgrades. ([transpower.co.nz](https://www.transpower.co.nz/hvdc-upgrade))
3. Prysmian: Transpower Issues Notice to Proceed for Cook Strait HVDC Link Upgrade
   · Prysmian reported receipt of the Cook Strait notice to proceed on June xx.xx 2026, activating project delivery. The announcement does not establish a separate vessel-purchase requirement. ([prysmian.com](https://www.prysmian.com/en/media/press-releases/prysmian-transpower-issues-notice-to-proceed-for-cook-strait-hvdc-link-upgrade))

4.8. Go-to-Market Strategy

A new yard entrant should sell a substantiated construction package through a qualified cable-mission specialist when it lacks comparable complete-vessel integration references. Royal IHC's Pacific Shipbuilding route shows the contribution: specialized platform engineering and mission equipment accompany the partner yard's construction execution. ▪▪▪ ▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪

Experienced integrated buyers provide a different entry route through retained mission packages. Prysmian's equipment responsibility and Ulstein's turnkey delivery illustrate the alternatives. ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪

For vessel owners and lessors, a capital-partner route should start with an identified installation operator and employment mandate, not an unallocated fleet concept. ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ Direct ownership is the alternative where the buyer needs unilateral employment authority and can carry the full asset obligation.

Sources & Evidence

1. Ulstein Verft delivers the cable-laying vessel Nexans Electra
   · Ulstein identifies responsibility for turnkey Electra delivery, including outfitting and finalization, providing a comparator to retained buyer equipment responsibility.
   ([ulstein.com](https://ulstein.com/news/ulstein-verft-delivers-the-cable-laying-vessel-nexans-electra))
2. Interview with Dario Brivio
   · Prysmian describes responsibility for Leonardo da Vinci's cable-laying equipment on a VARD naval platform, establishing a buyer-managed mission-package route.
   ([prysmian.com](https://www.prysmian.com/en/insight/projects/interview-dario-brivio))
3. VARD secures contract for one cable laying vessel for Prysmian Group
   · The repeat relationship supports an attributable qualification barrier for competing builders, not a conclusion that alternative yards cannot enter.
   ([vard.com](https://www.vard.com/articles/vard-secures-contract-for-one-cable-laying-vessel-for-prysmian-group-xx.xx))

4. Apply to lay cables

   · These activity-specific boundaries support assigning project authorization separately from vessel delivery and acceptance; they are not a uniform global rule.
   ([gov.uk](https://www.gov.uk/guidance/marine-licensing-cables))

5. Notice Regarding Joint Ownership of Large Work Vessels for Offshore Wind Construction

   · Penta-Ocean and Fuyo's January xx.xx 2025 basic agreement addresses construction responsibilities and post-completion management and chartering, with joint ownership contemplated after completion.
   ([penta-ocean.co.jp](https://www.penta-ocean.co.jp/english/updates/2025/xx.xx-xx.xx.html))

6. Construction begins on CS GENESIS and CS TRIUMPH for OMS Group

   · The specialist-led yard arrangement establishes complementary engineering, equipment, and construction contributions. Entry conditions and contractual obligations are analytical recommendations.
   ([royalihc.com](https://www.royalihc.com/news/construction-begins-cs-genesis-and-cs-triumph-oms-group))

7. Fibre optic cable lay vessels | Royal IHC

   · Royal IHC offers vessel design, mission equipment, automation, and lifecycle support within an integrated fiber-optic vessel proposition. Contractual transfer of those interfaces still requires verification.
   ([royalihc.com](https://www.royalihc.com/offshore-energy/offshore-vessels/fibre-optic-cable-lay-vessels))

5. Market Insights

5.1. Consumer Insights & End-User Perspective

The acquiring organization and the infrastructure customer can make different purchasing decisions. ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ For a builder, identifying an infrastructure project is therefore insufficient: the relevant buyer must have an asset requirement and the authority to commit to ownership or conversion.

Users need a configuration that supports the intended cable mission; asset purchasers need an accepted and employable vessel. ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪ ▪▪▪▪▪ ▪▪ ▪▪▪ ▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ Owners, lessors, and captive operators should verify who will accept and operate the asset before committing to a configuration.

Switching and adoption burdens arise at integrated interfaces rather than solely at the hull. ▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ The defensible choice depends on documented asset condition, responsible parties, and customer acceptance-not a universal preference for either pathway.

Sources & Evidence

1. Conversion
   · DNV identifies inherited structures, potentially limited original documentation, and class-yard-designer coordination as conversion concerns.
   ([dnv.com](https://www.dnv.com/services/ship-classification-fleet-in-service/conversion/))
2. NKT has placed order for new cable-laying vessel
   · NKT announced a placed vessel order on January xx.xx 2024, coordinated with expansion of its Karlskrona production site. This supports distinguishing the integrated supplier's asset decision from downstream infrastructure procurement.
   ([investors.nkt.com](https://investors.nkt.com/company-announcements/2024/nkt-has-placed-order-for-new-cable-laying-vessel/))
3. Van Oord's cable-laying vessel Calypso makes its debut and is now fully operational
   · Van Oord reported Calypso working on Sofia in October 2024, illustrating contractor-owned capability serving an infrastructure customer's installation assignment.
   ([vanoord.com](https://www.vanoord.com/drupal/media/data/default/2024-xx.xx/Press%20release%xx.xx-%20Van%20Oord%E2%xx.xx%99s%20cable-laying%20vessel%20Calypso%20makes%20its%20debut%20and%20is%20now%20fully%20operational%20_0.pdf))

4. Dynamic positioning (DP)
   · DNV describes DP as an integrated mechanical, electrical, and electronic system and provides assurance to owners, customers, and charterers. Mission acceptance and component-switching implications are analytical conclusions. ([dnv.com](https://www.dnv.com/services/dynamic-positioning-xx.xx/))

5.2. Consumer Experience Benchmarking

The useful benchmark is evidence of an accepted mission, not a common score across interchangeable vessels. ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪
Buyers should distinguish proposed configuration, delivery acceptance, and actual mission employment when comparing references.

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These are service proxies for evaluating the readiness supported by a repair vessel, not rankings of hull performance. A buyer should verify which dependencies and exclusions sit outside a promised response before using that promise as a procurement benchmark.

Operator experience also depends on the handover and support package. Kongsberg Maritime's refit offering includes commissioning, site services, crew training, and through-life support. ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪

Sources & Evidence

1. Ulstein Verft delivers the cable-laying vessel Nexans Electra
   · Ulstein reported delivery of Nexans Electra on May xx.xx 2026; delivery is a different evidence milestone from demonstrated project employment.
   ([ulstein.com](https://ulstein.com/news/ulstein-verft-delivers-the-cable-laying-vessel-nexans-electra))
2. Van Oord's cable-laying vessel Calypso makes its debut and is now fully operational
   · Calypso's reported project employment provides an operational reference for power-cable installation, distinct from vessel delivery or a proposed configuration.
   ([vanoord.com](https://www.vanoord.com/drupal/media/data/default/2024-xx.xx/Press%20release%xx.xx-%20Van%20Oord%E2%xx.xx%99s%20cable-laying%20vessel%20Calypso%20makes%20its%20debut%20and%20is%20now%20fully%20operational%20_0.pdf))
3. Subsea Cable Maintenance
   · Global Marine identifies mobilization, transit, repair duration by water depth, and reporting as contractual performance dimensions. Its service description separately identifies shore-related exclusions and dedicated vessel-depot arrangements.
   ([globalmarine.co.uk](https://globalmarine.co.uk/services/subsea-cable-maintenance/))
4. Conversions, retrofits, and refits
   · Kongsberg Maritime's refit offering includes commissioning, site services, crew training, and through-life support. These provide service dimensions for buyer verification, not proof of comparative vessel performance.
   ([kongsbergmaritime.com](https://www.kongsbergmaritime.com/services/conversions-retrofit-and-refit/))

5.3. Opportunity Mapping

Asset-led power-cable opportunities are most defensible where the acquiring supplier or contractor has an explicit investment mandate, rather than merely exposure to offshore wind or grid spending. [redacted] Qualitative prioritization should favor named purchasers, surviving employment commitments, and agreed acceptance requirements over policy-led prospects; it does not establish that power-cable assets are universally accessible or more profitable.

[redacted] EU telecommunications repair-module funding creates a qualified receiving-vessel requirement, not an unrestricted newbuild opportunity. Equipment procurement remains distinct from acquisition or conversion of the studied vessel.

Access-constrained crossings and landfalls support differentiated ships and barges rather than a default preference for larger offshore platforms. Caldwell's Potomac reference addresses bridge clearance, while TAMS' Australian nearshore work used a client-equipped barge and a defined offshore handover. [redacted]

Existing-platform conversion is accessible through a different capability chain. IT Infinity demonstrates completed vessel transformation, while specialist engineering can reconcile inherited documentation, equipment interfaces, and yard execution. [redacted]

[redacted] Suppliers

should verify the acquiring organization, procurement authority, accepted cable configuration, and ownership requirement before reserving dedicated capacity. Funded acquisition and vessel-specific acceptance would strengthen these prospects; standards, service requirements, and policy participation alone are insufficient commitment triggers.

Sources & Evidence

1. VARD secures contract for one cable laying vessel for Prysmian Group
   · VARD records a repeat Prysmian construction relationship and a delivery chain separating Romanian hull construction from Norwegian final integration. The announcement does not establish exclusivity. ([vard.com](https://www.vard.com/articles/vard-secures-contract-for-one-cable-laying-vessel-for-prysmian-group-xx.xx))
2. Conversion
   · DNV recommends establishing the conversion approval perimeter and schedule. Hull-specific screening before commitment is a commercial implication. ([dnv.com](https://www.dnv.com/services/ship-classification-fleet-in-service/conversion/))
3. Orange Marine modernizes its fleet of cable ships to secure digital infrastructure in Europe, Africa and the Middle East
   · The announced replacements identify a concrete maintenance operator and continuity requirement, providing a more specific capital-procurement lead than general resilience policy. ([orange.com](https://www.orange.com/assets/document/xx.xx/download))
4. Subsea Cable Maintenance
   · Global Marine describes maintenance vessels, spare-plant depots, scheduled-cable coverage, and approval controls on some outside installation work. ([globalmarine.co.uk](https://globalmarine.co.uk/services/subsea-cable-maintenance/))
5. CEF-Digital second call for proposals to increase Europe's submarine cable repair capacities launched this year, investing a further EUR 40 million
   · The call concerns modular repair equipment, not unrestricted commercial vessel acquisition or proven power-cable equivalence. ([hadea.ec.europa.eu](https://hadea.ec.europa.eu/news/cef-digital-second-call-proposals-increase-europes-submarine-cable-repair-capacities-launched-year-2026-xx.xx-18_en))
6. Nexans to build third generation cable laying vessel to drive global energy transition
   · The investment announcement identifies an integrated cable supplier as the asset purchaser; infrastructure customers and vessel buyers occupy different purchasing positions. ([nexans.com](https://www.nexans.com/press-releases/nexans-to-build-third-generation-cable-laying-vessel-to-drive-global-energy-transition/))
7. IT Infinity - From PSV to State-of-the-Art Cable-Laying Vessel
   · VARD documents IT Infinity's December 2024 delivery after conversion from a platform supply vessel, including structural, electrical, and cable-equipment changes. ([vard.com](https://www.vard.com/cases/it-infinity))
8. Congressional Record - House, December 10, 2025: Report on Procurement Strategy for Submarine Cable Laying and Repair Ships
   · December xx.xx 2025 congressional explanatory text directs a Navy replacement-ship strategy and consideration of interim cable services; it is not a vessel construction award. ([govinfo.gov](https://www.govinfo.gov/content/pkg/CREC-2025-xx.xx-xx.xx/pdf/CREC-2025-xx.xx-xx.xx-pt2-PgH5571-xx.xx.pdf))
9. Marine Construction Services | Caldwell Marine International
   · The historical project supports an access-specific barge proposition, not current asset availability or unrestricted offshore equivalence. ([caldwellmarine.com](https://www.caldwellmarine.com/marine-construction-services/))

10. Subsea Services | TAMS
    - The project establishes a configuration-dependent nearshore route whose repeat use requires equipment access and assigned integration and handover responsibilities. ([tamsgroup.com.au](https://www.tamsgroup.com.au/capabilities/subsea-services/))
11. Modernization and Conversion for Existing Vessels - C-Job
    - C-Job offers existing-vessel assessment, equipment-integration review, documentation reconciliation, class-design support, and yard assistance. These are offered engineering services rather than guaranteed outcomes. ([c-job.com](https://c-job.com/solutions/modernization-and-conversion-for-existing-vessels/))
12. Marine Resource Plan
    - The Marine Resource Plan is a repair-service proposition; host compatibility and purchased mobilization obligations remain customer-specific. ([nkt.com](https://www.nkt.com/products-solutions/lifecycle-cable-services/repair/offshore/marine-resource-plan))
13. ITU-T G.9730.2: Scientific monitoring and reliable telecommunication submarine cable systems
    - ITU-T G.xx.xx defines telecommunications systems incorporating scientific monitoring. Its system-level requirements do not establish an individual vessel's accepted sensing configuration or acquisition mandate. ([itu.int](https://www.itu.int/rec/dologin_pub.asp?id=T-REC-G.xx.xx-xx.xx-I%xx.xx%21PDF-E&lang=e&type=items))

5.4. Distribution Channel Analysis

[illegible] The choice is between transferred delivery accountability and retained package control, subject to the actual contract. Neither route automatically covers every equipment interface or post-delivery obligation.

[illegible] Equipment-channel presence should not be interpreted as authority to deliver or approve the complete vessel. Buyers need to identify the prime, relevant equipment manufacturers, and the party responsible for unresolved cross-system faults.

[illegible] Direct OEM support offers clearer product accountability, whereas local representation adds reach but requires verification of authorization, escalation rights, and covered services. Neither arrangement replaces project permission or customer acceptance.

Sources & Evidence

1. Ulstein Verft delivers the cable-laying vessel Nexans Electra
   · Ulstein describes turnkey vessel delivery, including outfitting and finalization, establishing a direct prime-delivery example.
   ([ulstein.com](https://ulstein.com/news/ulstein-verft-delivers-the-cable-laying-vessel-nexans-electra))
2. Interview with Dario Brivio
   · Prysmian described responsibility for Leonardo da Vinci's cable-laying equipment on a VARD naval platform, establishing buyer-managed package procurement.
   ([prysmian.com](https://www.prysmian.com/en/insight/projects/interview-dario-brivio))
3. VARD secures contract for one cable laying vessel for Prysmian Group
   · VARD's Prysmian vessel agreement allocated hull construction to Romania and final outfitting, commissioning, and delivery to Norway, illustrating a geographically distributed delivery chain.
   ([vard.com](https://www.vard.com/articles/vard-secures-contract-for-one-cable-laying-vessel-for-prysmian-group-xx.xx))
4. Cable laying vessel
   · Kongsberg Maritime offers cable-vessel system integration, lifecycle support, refits, and remote diagnostics by certified engineers. The offering supports assessing equipment support separately from the vessel prime's obligations.
   ([kongsbergmaritime.com](https://www.kongsbergmaritime.com/segments/offshore-wind/pipelay/))
5. Conversions, retrofits, and refits
   · The company offers modernization through engineering, integration, installation, and support, establishing an aftermarket route for existing vessel owners.
   ([kongsbergmaritime.com](https://www.kongsbergmaritime.com/services/conversions-retrofit-and-refit/))
6. Our channel partners
   · Kongsberg Maritime identifies global channel partners and local offices for product distribution. This supports an equipment-level reach mechanism, not a claim that partners deliver or approve complete cable-laying vessels.
   ([kongsbergmaritime.com](https://www.kongsbergmaritime.com/support/local-market-representatives/))

5.5. Pricing Trend Analysis

Commercial offers for cable-laying vessels must be interpreted through their delivery perimeter. Prysmian's owner-responsible mission equipment and Ulstein's turnkey delivery illustrate different allocations of engineering and integration work. ■■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■■■■ ■■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■ ■■■■■ ■■■■■■■■ ■■■ ■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■ ■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■■■■ ■■■■■■■ ■■■■ ■■■■■■■■ ■ ■■■■■■■■ ■■■■■■■■ ■■ ■■ ■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■

Conversions introduce a different uncertainty: inherited structures and incomplete documentation can change the approval and work scope. An owner should establish which existing-asset conditions are included, excluded, or subject to variation before agreeing commercial terms. ■■■ ■■■■■■■■ ■■■■■ ■■■■■■■■■ ■■■ ■■■■■ ■■■■■ ■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■ ■■■■■ ■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■ ■■■■■■■■■■■■■■ ■■■■■■■■ ■■■■■ ■■■■■■■■■■■ ■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■ ■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■ ■■ ■ ■■■■■■■■■ ■■■■■■■■ ■■ ■■■■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■ ■■■■■■■■ ■■■■■ ■■■■■ ■■■■■■■■ ■■ ■■■■■■■■ ■■■■■ ■■ ■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■ ■■■ ■■■■■■■

Macroeconomic pressure can interrupt prospective vessel employment without changing an existing vessel contract. Ørsted's May 2025 Hornsea xx.xx decision cited financing, supply-chain, and execution concerns and terminated project supply-chain contracts. ■■■ ■■■■■ ■■■ ■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■■■ ■■ ■■ ■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■ ■■■■■■■■■■■ ■■■■■■ ■■ ■■■■■■■■■■■ ■■■■■■■■■■■■ ■■ ■■■■■■■■■■■■■ ■■■■ ■■■■■ ■■■■■■■■ ■■■■■■■■ ■■ ■■■■■■■■■■ ■■■ ■■■■ ■■■■■■■■■■■ ■■■ ■ ■■■■■■■ ■■■■■■■■■■ ■■■■■ ■■■■■■ ■■■■■■■■■■■ ■■ ■■■■■■■■■■

Sources & Evidence

1. Ulstein Verft delivers the cable-laying vessel Nexans Electra
   · The described turnkey scope supports examining included delivery responsibilities when evaluating commercial offers; it does not establish every warranty or contractual obligation. ([ulstein.com](https://ulstein.com/news/ulstein-verft-delivers-the-cable-laying-vessel-nexans-electra))
2. Interview with Dario Brivio
   · Separate platform and mission-equipment responsibility supports scope-based commercial comparison and explicit allocation of interface changes and defects. These allocation implications are analytical, not reported contract terms. ([prysmian.com](https://www.prysmian.com/en/insight/projects/interview-dario-brivio))
3. Conversion
   · Conversion approval scope and documentation depend on the existing asset. Treating unresolved inherited conditions as negotiated commercial exposure, rather than assuming a simpler procurement, is an analytical implication. ([dnv.com](https://www.dnv.com/services/ship-classification-fleet-in-service/conversion/))
4. Ørsted to discontinue the Hornsea 4 offshore wind project in its current form
   · On May xx.xx 2025, Ørsted discontinued Hornsea xx.xx in its then-current form and terminated supply-chain contracts, citing higher interest rates, supply-chain costs, and execution risk. This establishes project-commitment exposure, not repricing of vessel contracts. ([orsted.com](https://orsted.com/en/company-announcement-list/2025/xx.xx/orsted-to-discontinue-the-hornsea-xx.xx-offshore-wind-xx.xx))
5. Notice of Technical Corrections to the Harmonized Tariff Schedule of the United States for Duties Imposed by Presidential Proclamation 11021
   · The April 2026 Commerce notice clarifies that the referenced metals duties concern imported aluminum, steel, or copper articles and derivatives through specified tariff provisions. Component classification and contractual pass-through implications are analytical. ([public-inspection.federalregister.gov](https://public-inspection.federalregister.gov/2026-xx.xx.pdf))

5.6. Regulatory Compliance & Standards Framework

Commercial access requires separate reviews of statutory compliance, class requirements, and customer acceptance. SOLAS establishes applicable safety requirements under flag-state responsibility, supported by surveys, certificates, and port-state control. ■■■■■ ■■ ■■■■■■■■■ ■■■■■ ■■■■■■■■■ ■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■■■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■ ■■■ ■■■ ■■■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■ ■ ■■■■■■■■■■■ ■■■■■ ■■■ ■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■ ■■■■■ ■■■■■ ■■ ■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■ ■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■ ■■ ■■■■■■ ■■■■■■■■■■■■■■ ■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■

Project permission is a separate gate. MMO guidance requires licensing for telecommunications and power-cable laying in UK territorial waters and distinguishes international cables outside those waters from associated works that may still require permission. ■■■■■■■■■ ■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■■ ■■■ ■■■ ■■■■■■■■ ■■■■■■■■

[redacted] FuelEU Maritime separately covers qualifying commercial ships exceeding xx.xx gross tonnes serving passenger or cargo transport. Owners should assess vessel classification and activities independently under each framework and assign reporting and operating-contract responsibilities without assuming that every cable vessel has identical exposure.

[redacted] It includes covered self-propelled offshore construction units, while treating certain other categories, including nonmechanically propelled vessels, as nonmandatory applications. Buyers should establish the applicable class scope and integration documentation early; these classification requirements are not a universal statute for every included platform.

Equipment rights require a further review distinct from vessel certification. Published application EP4371919A1 concerns a specific cable carousel, illustrating why rights diligence belongs to the proposed handling package and intended jurisdictions. [redacted]

Sources & Evidence

1. Apply to lay cables
   · MMO guidance requires licensing for telecommunications and power-cable laying in UK territorial waters. International cables outside those waters receive different treatment, while associated works may still require a licence. ([gov.uk](https://www.gov.uk/guidance/marine-licensing-cables))
2. Dynamic positioning (DP)
   · DNV distinguishes international, national, class, industry, and equipment-specific requirements and guidance within DP assurance, supporting separate statutory, class, and customer acceptance reviews. ([dnv.com](https://www.dnv.com/services/dynamic-positioning-xx.xx/))
3. FAQ - Maritime transport in EU Emissions Trading System (ETS)
   · EU MRV coverage includes offshore ships of at least xx.xx gross tonnage from January xx.xx 2025. Offshore ships of at least xx.xx gross tonnage enter EU ETS coverage from the 2027 reporting period; voyage scope also determines exposure. ([climate.ec.europa.eu](https://climate.ec.europa.eu/areas-action/transport-decarbonisation/reducing-emissions-shipping-sector/faq-maritime-transport-eu-emissions-trading-system-ets_en))
4. European Patent Application EP4371919A1: Cable carousel for heavy-duty electric cable or umbilical
   · European patent application EP4371919A1, published May xx.xx 2024, concerns a cable carousel for heavy-duty electric cable or umbilical. The publication establishes specific claimed subject matter, not present enforceability or freedom to operate. ([patentimages.storage.googleapis.com](https://patentimages.storage.googleapis.com/f0/d4/e8/b63d315361c094/EP4371919A1.pdf))

5. International Convention for the Safety of Life at Sea (SOLAS), 1974
   · SOLAS establishes ship safety requirements enforced by flag states, with survey, certification, and port-state control provisions. The convention's applicability differs across ship classes and voyage contexts. ([imo.org](https://www.imo.org/en/about/conventions/pages/international-convention-for-the-safety-of-life-at-sea-%28solas%xx.xx%2C-1974.aspx))
6. Questions and answers on Regulation (EU) 2023/1805 on the use of renewable and low-carbon fuels in maritime transport
   · FuelEU Maritime applies to qualifying commercial ships exceeding xx.xx gross tonnes serving passenger or cargo transport. Its applicability must therefore be assessed separately from offshore-ship ETS coverage. ([transport.ec.europa.eu](https://transport.ec.europa.eu/transport-modes/maritime/decarbonising-maritime-transport-fueleu-maritime/questions-and-answers-regulation-eu-xx.xx-use-renewable-and-low-carbon-fuels-maritime-transport_en))
7. IACS UR E26 Rev.1: Cyber resilience of ships
   · IACS UR E26 Rev.xx.xx applies through member societies to covered ships contracted for construction on or after July xx.xx 2024. Its scope distinguishes covered self-propelled offshore construction units from categories for which it is nonmandatory guidance, including nonmechanically propelled vessels. ([iacs.s3.af-south-xx.xx.amazonaws.com](https://iacs.s3.af-south-xx.xx.amazonaws.com/wp-content/uploads/2022/xx.xx/xx.xx/UR-E26-Rev.xx.xx-Nov-2023-CR.pdf))

5.7. ESG & Sustainability Analysis

Environmental modernization is visible in cable-vessel investment, but enabled capability must be separated from realized outcomes. Calypso incorporates hybrid power and shore supply, while NKT reported certification of NKT Victoria for HVO biofuel. ■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■ ■■■■■■ ■■■■■■ ■■■■ ■■■■■■■ ■■ ■■ ■■■■■■■■■■■■ ■■■■■■

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Workforce conditions are part of this implementation burden. ■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■ ■■■ ■■■■■ ■■■■■■■■■■■■■ ■■■■■■■ ■■■■■ ■■■ ■■■■■■■■ ■■■■■■ ■■■■■■■■■■■■ ■■■■■■ ■■■■■■■■■■■■■ ■■■■ ■■■■■■■■ ■■■■■■ ■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■ ■■ ■■■■■■ ■■■■■■ ■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■■■■■ ■■■■■■ ■■■ ■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■■ ■■ ■■■■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■■ ■■■ ■ ■■■■■■■■■■■ ■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■ Relevant monitoring signals are completed training, usable energy connections, documented fuel sourcing, and mission-specific environmental reporting.

Sources & Evidence

1. Efficient DP Operation

   · The IMO energy-efficiency portal links DP efficiency to installed functionality, mission suitability, company policy, and crew training. It also emphasizes the importance of position-keeping capability. No operating settings or numerical reduction assumptions are used. ([greenvoyage2050.imo.org](https://greenvoyage2050.imo.org/technology/efficient-dp-operation/))

2. Van Oord's cable-laying vessel Calypso makes its debut and is now fully operational

   · The operational Calypso incorporates hybrid power, batteries, shore supply, and energy management; these installed features do not establish full-mission emissions outcomes. ([vanoord.com](https://www.vanoord.com/drupal/media/data/default/2024-xx.xx/Press%20release%xx.xx-%20Van%20Oord%E2%xx.xx%99s%20cable-laying%20vessel%20Calypso%20makes%20its%20debut%20and%20is%20now%20fully%20operational%20_0.pdf))

3. Questions and answers on Regulation (EU) 2023/1805 on the use of renewable and low-carbon fuels in maritime transport

   · The Commission distinguishes life-cycle energy emissions from efficiency and explains that hybrid-electric reporting outcomes also depend on the non-electrical energy source. This supports separating architecture labels from environmental outcomes. ([transport.ec.europa.eu](https://transport.ec.europa.eu/transport-modes/maritime/decarbonising-maritime-transport-fueleu-maritime/questions-and-answers-regulation-eu-xx.xx-use-renewable-and-low-carbon-fuels-maritime-transport_en))

4. NKT Victoria ready to operate on biofuel

   · NKT reported certification of NKT Victoria for HVO biofuel in September 2023. Certification establishes enabled fuel compatibility, not continuous use or a verified outcome for every cable mission. ([nkt.com](https://www.nkt.com/news-press-releases/nkt-victoria-ready-to-operate-on-biofuel))

5. Maritime Labour Convention, 2006

   · The Maritime Labour Convention covers seafarer employment, work and rest, accommodation, medical care, health and safety, and complaint procedures. Linking these responsibilities to cable-vessel training and readiness commitments is a commercial inference. ([ilo.org](https://www.ilo.org/mlc))

5.8. Disruption & Risk Scenarios

[redacted] A suitable vessel cannot resolve an incomplete permission package. GAO's realized Marmac xx.xx reference also shows that one discontinued initiative does not eliminate every domestic route.

If outfitting, integration, or customer acceptance slips, a campaign dependent on an announced vessel can lose its planned delivery resource. Eleonora's construction-stage status supports retaining this scenario, not claiming an actual delay. [redacted]

RESEARCH SAMPLE REPORT

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If simultaneous repair requests compete with installation employment, technical repair capability may not provide the priority expected by a network owner. Maintenance agreements can restrict outside work, while dedicated, shared, and ad hoc access models purchase different rights. ■■■■■■■■■ ■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■ ■■■■■■ ■■■■■■■■ ■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■ ■■■■ ■■■■■■■ ■■ ■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■■■■

Sources & Evidence

1. Subsea Cable Maintenance
   · Maintenance obligations and separately contracted shore-related work support assessing dispatch rights and coverage rather than assuming unrestricted cross-mission availability. ([globalmarine.co.uk](https://globalmarine.co.uk/services/subsea-cable-maintenance/))
2. Ørsted to discontinue the Hornsea 4 offshore wind project in its current form
   · Financing, supply-chain, and execution concerns drove that dated discontinuation. Prospective vessel-employment exposure is an analytical implication, not a universal cancellation prediction. ([orsted.com](https://orsted.com/en/company-announcement-list/2025/xx.xx/orsted-to-discontinue-the-hornsea-xx.xx-offshore-wind-xx.xx))
3. Apply to lay cables
   · MMO guidance distinguishes UK territorial cable laying, international cables outside territorial waters, and associated works that may require licensing. ([gov.uk](https://www.gov.uk/guidance/marine-licensing-cables))
4. Commercial Shipbuilding: Selected Offshore Wind Projects Used a Mix of U.S. and Foreign Vessels, Spurring Some Shipbuilding Investments
   · GAO's March xx.xx 2026 report records cessation of Kalypso's earlier vessel initiative as of December 2025 and separately documents Marmac xx.xx's partnered Empire Wind cable work. ([files.gao.gov](https://files.gao.gov/reports/GAO-xx.xx-xx.xx/index.html))
5. NKT Eleonora på plass hos VARD Brattvåg
   · The announcement expressly identifies remaining work before delivery, supporting a conditional commissioning-delay scenario rather than an assertion that delay has occurred. ([remoy-management.no](https://remoy-management.no/news/nkt-eleonora-pa-plass-hos-vard-brattvag/))
6. Van Oord Annual Report 2025 - Offshore Energy
   · Van Oord's 2025 offshore-energy review reports delays from navigation interference and supplier-equipment breakdowns, while also reporting completed projects. These observations are portfolio-wide, not solely cable-laying outcomes. ([annualreport.vanoord.com](https://annualreport.vanoord.com/annual-report/world-of-van-oord/offshore-energy-xx.xx))
7. Our Services - Cable System Company Singapore | ASEAN Cableship
   · The service alternatives support negotiating availability and competing-commitment provisions; a published model does not establish a customer's restoration guarantee. ([aseancableship.com](https://www.aseancableship.com/our-services/))

5.9. Return on Investment & Cost-Benefit Analysis

For a vessel purchaser, the principal benefit of ownership is control over an accepted marine capability and its employment; the burdens include capital commitment, crewing, maintenance, mission integration, and continuing support. Shared capital participation can distribute ownership responsibility but introduces control and exit interfaces, as illustrated by the prospective Penta-Ocean-Fuyo arrangement. ■■■■■■■ ■■■■■■ ■■■■■■ ■■■■■■■ ■■■■ ■■■■■■■■■■ ■■■■ ■■■ ■■■■■■■■■ ■■■■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■ ■■■■■■■ ■■ ■■ ■■■ ■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■ ■■ ■■■■■■■■■■ ■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■ ■■■■■■■■■ ■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■■■ ■■■ ■■■■■■ ■■■■■■■ ■■■■■ ■■■■■■■■■■■■■■ ■■ ■■■■■■■■■■

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Energy modernization should be evaluated against actual cable-vessel duties and usable energy supplies. ■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■ ■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■■■■■ ■■■■■■■■ ■■■■ ■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■ ■■■ ■■■■■ ■■■■■■ ■■■ ■■■ ■■■■■■■■ ■■■■■■■■ Commitment should follow an accepted duty case and assigned support obligations; retaining a suitable existing architecture remains an alternative when the proposed features cannot be used reliably in the intended employment.

Sources & Evidence

1. Efficient DP Operation
   · IMO's efficiency portal links positioning-system performance to installed functionality, applicable duties, company policy, and crew training. No numerical savings assumption is adopted. ([greenvoyage2050.imo.org](https://greenvoyage2050.imo.org/technology/efficient-dp-operation/))
2. Ulstein Verft delivers the cable-laying vessel Nexans Electra
   · The delivered construction relationship supports comparing expressly transferred interfaces with buyer-managed packages, without assuming universal turnkey warranty coverage. ([ulstein.com](https://ulstein.com/news/ulstein-verft-delivers-the-cable-laying-vessel-nexans-electra))
3. Interview with Dario Brivio
   · Separate platform and mission-equipment responsibilities support evaluating retained control against integration and acceptance burdens; economic implications are conditional analysis. ([prysmian.com](https://www.prysmian.com/en/insight/projects/interview-dario-brivio))
4. Conversion
   · Existing-asset uncertainty can affect conversion scope; neither faster delivery nor lower overall economic burden is established by the construction pathway alone. ([dnv.com](https://www.dnv.com/services/ship-classification-fleet-in-service/conversion/))

5. NKT boosts offshore installation capabilities with upgrades of cable-lay vessel NKT Victoria
   · NKT identifies shore-power use, energy storage, and enabled biofuel operation alongside vessel modernization; these features do not establish another vessel's realized economic benefit. ([nkt.widen.net](https://nkt.widen.net/content/ct5bcrpb1f/pdf/NKT-upgrades-NKT-Victoria.pdf?u=gj0n1y))
6. ABS Requirements for Hybrid and All-Electric Power Systems for Marine and Offshore Applications - April 2024
   · The classification framework addresses integrated power arrangements; an architecture or readiness label does not establish realized cable-mission savings. ([ww2.eagle.org](https://ww2.eagle.org/content/dam/eagle/rules-and-guides/current/conventional_ocean_service/xx.xx-requirements-for-hybrid-electric-power-systems-for-marine-and-offshore-applications-2024/xx.xx-hybrid-electric-power-systems-reqts-Apr24.pdf))
7. Notice Regarding Joint Ownership of Large Work Vessels for Offshore Wind Construction
   · The disclosed arrangement establishes a capital-partner pathway distinct from installation execution; shared-control and employment implications require transaction-specific agreement. ([penta-ocean.co.jp](https://www.penta-ocean.co.jp/english/updates/2025/xx.xx-xx.xx.html))
8. Our Services - Cable System Company Singapore | ASEAN Cableship
   · ASEAN Cableship offers zone-based maintenance, dedicated standby, shared dedicated arrangements, and ad hoc call-out services. These are distinct access models. ([aseancableship.com](https://www.aseancableship.com/our-services/))
9. Modernization and Conversion for Existing Vessels - C-Job
   · C-Job connects modernization assessment with actual vessel use and inherited documentation, supporting a vessel-specific cost-benefit comparison rather than a universal conversion preference. ([c-job.com](https://c-job.com/solutions/modernization-and-conversion-for-existing-vessels/))

6. Cumulative Impact of Artificial Intelligence 2026

AI engagement is documented among participants in the cable-vessel ecosystem, but corporate commitment is not vessel-level deployment evidence. ■■■ ■■■■■■ ■■■■ ■■■■■■ ■■■■■■ ■■■■■■■■■■ ■■■■■■■ ■ ■■ ■■ ■ ■■■■■■■■■ ■■■■■■ ■■■ ■■■■ ■■■■■■■■■ ■■■■■■■■■■■■■ ■■ ■■■ ■■■■■■■■■ ■■■■■■■■ ■■ ■■■■■■ ■■ ■■■■■■■ ■■■■■ ■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■ ■■ ■■■■ ■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■■■■■■■ ■■■■■■■■■■■■ These activities support an emerging capability assessment, not a claim that named cable-laying vessels already use those applications.

For cable-vessel builders and owners, the conditional commercial value lies in design documentation, equipment-health interpretation, and energy-management decision support. ■■■■■■■■ ■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■ ■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■ ■■■■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■ ■■■■ ■■ ■■■■■■■■ ■■■■■■■■■■■■ Generic navigation or propulsion results do not establish cable-handling performance, and AI does not replace an accepted mission configuration.

Governance can determine whether an application is commercially usable. DNV emphasizes continuous, system-wide assurance as models and data change; IMO cyber-risk guidance connects digital risk with existing safety management. ■■■■■■ ■■■■■■ ■■■■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■ ■■■■■■■■■■■■■■■ ■■■■■ ■■■■■■■ ■■■■ ■■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■■■ ■■■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■ ■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■ ■■■■■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■ ■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■ ■■ ■ ■■■■■■■■■■■ ■■■■■■■■■■■■■■■ ■■■■■■■■■■■ ■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■■■■■■■■■ ■■ ■■ ■■■■■ ■■ ■■ ■■■■■■■ ■■■■■■■■■ ■■ ■■■■■■■■■■ ■■■■■■■■■

Sources & Evidence

1. Van Oord Annual Report 2025: Van Oord strategy
   · Van Oord's 2025 annual report identifies Digital & AI as a strategic theme and describes investment in data foundations and systems. This establishes corporate commitment, not AI deployment on Calypso or another named cable vessel. ([annualreport.vanoord.com](https://annualreport.vanoord.com/annual-report/strategy-and-value-creation/van-oord-strategy))
2. VARD a part of world's first Maritime AI Center
   · VARD announced participation in the Norwegian Maritime AI Center in October 2025 and identified closer coordination with IT and cybersecurity functions. Participation is evidence of research engagement rather than vessel-level installation. ([vard.com](https://www.vard.com/articles/vard-a-part-of-worlds-first-maritime-ai-center))
3. Norwegian Maritime AI Center: Use Cases
   · NTNU describes prototype and validation use cases for AI-supported ship design, predictive maintenance, navigation awareness, and energy-storage management. Cable-vessel applications remain conditional extrapolations from this maritime research. ([ntnu.edu](https://www.ntnu.edu/mai/use-cases))

4. Norwegian Maritime AI Centre: Research & innovation
   · NTNU identifies domain-specific data, hybrid models, explainability, human-centered methods, education, and demonstrators as foundations for maritime AI. These support integration and workforce prerequisites rather than established cable-vessel productivity effects. ([ntnu.edu](https://www.ntnu.edu/mai/research))
5. DNV outlines foundations for achieving trustworthy AI
   · DNV's March 2026 AI-assurance publication emphasizes system interactions, evidence-linked claims, and continuous reassessment as models, data, and conditions change. Its recommended practice is an assurance framework, not a universal statutory approval.
   ([dnv.com](https://www.dnv.com/news/2026/dnv-outlines-foundations-for-achieving-trustworthy-ai/))
6. Maritime cyber risk
   · IMO's maritime cyber-risk guidance addresses integration into existing safety management systems and distinguishes high-level recommendations from the associated resolution encouraging administrations to address cyber risk. ([imo.org](https://www.imo.org/en/ourwork/security/pages/cyber-security.aspx))

7. Cable Laying Vessel Market, by Vessel Platform

[redacted] A barge owner therefore needs access to the relevant support resources, not merely the principal asset. A ship alternative should be evaluated against the same cable mission and access requirements rather than assumed to eliminate every supporting-vessel obligation.

[redacted] For a conversion supplier, the commercially relevant reference is delivery of the configured asset, not supply of a carousel alone. Buyers should distinguish a complete conversion package from equipment intended for subsequent mobilization; retaining equipment procurement control also retains responsibility for the interfaces left outside the supplier's scope.

Platform identity must remain separate from propulsion and working-position capability. Prysmian's 2015 Cable Enterprise conversion retained the barge designation while adding DP2 positioning and autonomous maneuvering during installation, alongside shallow-water grounding capability. [redacted]

Figure 7. Global Cable Laying Vessel Market, by Vessel Platform: Market share evolution, 2025-2032

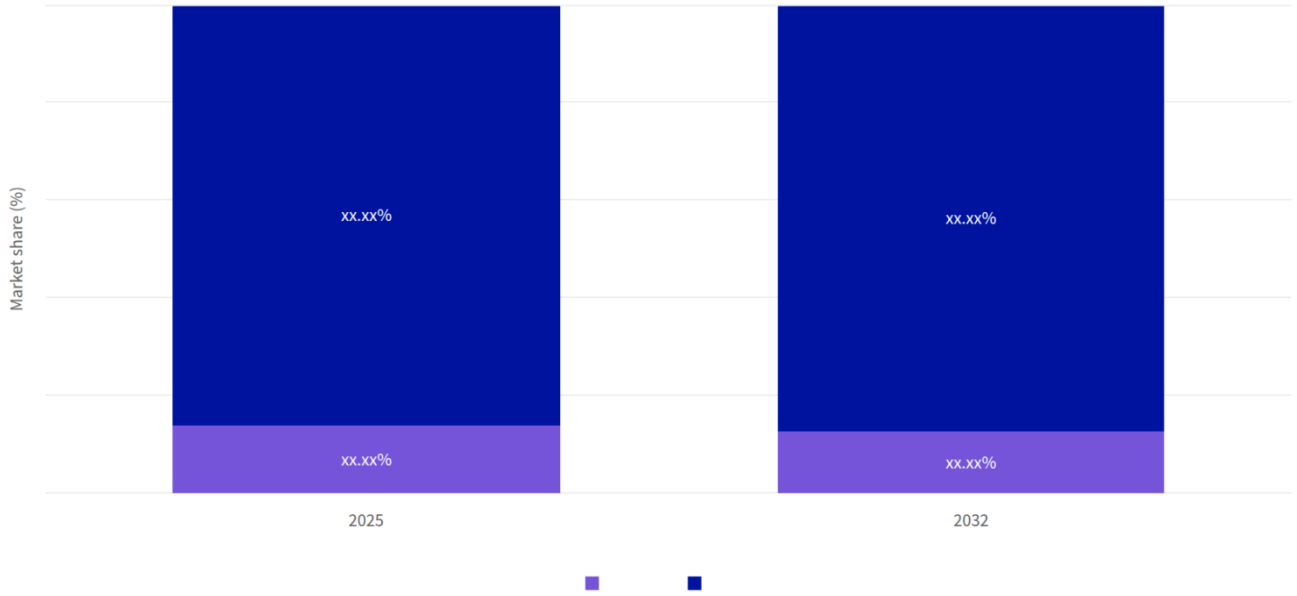

Figure 8. Global Cable Laying Vessel Market Size, by Vessel Platform, 2025 vs 2026 vs 2032

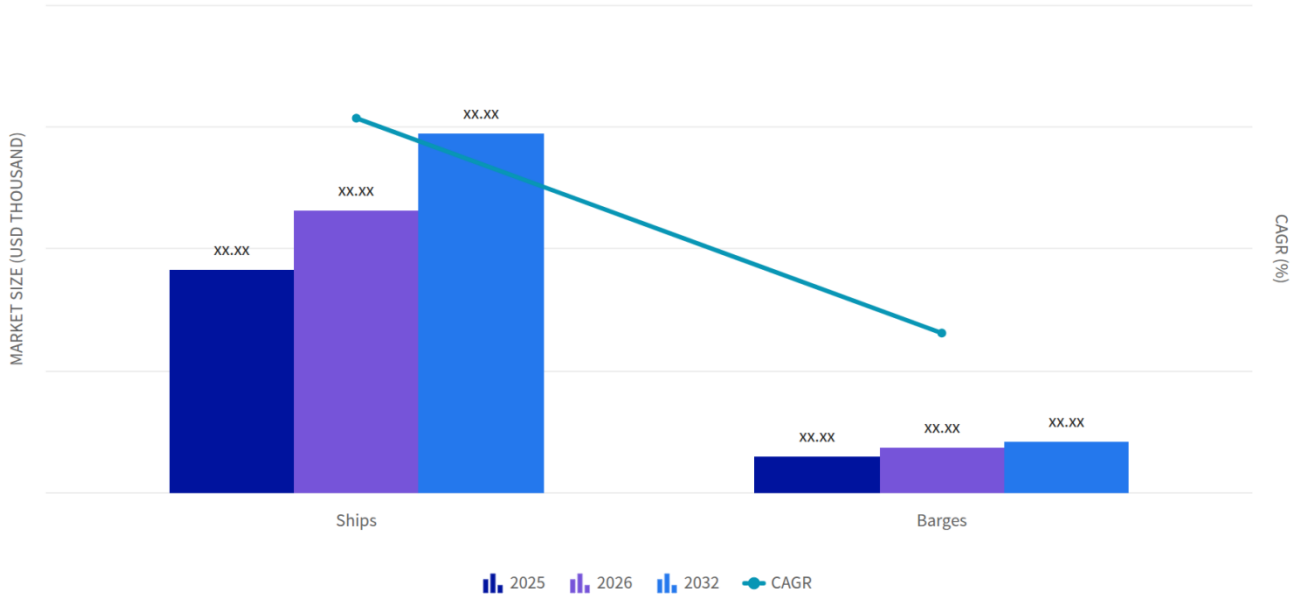

Table 4. Global Cable Laying Vessel Market, by Vessel Platform growth contribution, 2025-2032

Category	2025 value (USD Thousand)	2032 value (USD Thousand)	Added value (USD Thousand)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Barges	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ships	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 5. Global Cable Laying Vessel Market Size, by Vessel Platform, 2017-2032 (USD Thousand)

Vessel Platform	2023	2024	2025	2026	2027	2032	CAGR (%)
Barges	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ships	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Prysmian's Cable Enterprise Ready for Sail Out Following Upgrade Works
   · Prysmian's May xx.xx 2015 announcement describes Cable Enterprise's conversion from a moored barge to a DP2 barge, autonomous installation maneuvering, and retained shallow-water grounding capability. ([prysmian.com](https://www.prysmian.com/sites/www.prysmian.com/files/media/documents/PR_varo.pdf))
2. Commercial Shipbuilding: Selected Offshore Wind Projects Used a Mix of U.S. and Foreign Vessels, Spurring Some Shipbuilding Investments
   · GAO distinguishes specialized cable-installation vessels and cable-laying barges, documenting towing and anchor-handling support in selected U.S. offshore-wind projects. Deployment-package implications are analytical. ([files.gao.gov](https://files.gao.gov/reports/GAO-xx.xx-xx.xx/index.html))
3. Ship Conversion Project for Cable Laying Barge
   · V.Group documents a delivered barge conversion incorporating cable handling, positional mooring, generation, accommodation, design approvals, and owner-supplied equipment coordination. ([vgrouplimited.com](https://vgrouplimited.com/case-study/engineering/))

7.1. Ships

Table 6. Global Cable Laying Vessel Market Size, by Ships, by Region, 2017-2032 (USD Thousand)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 7. Global Cable Laying Vessel Market Size, by Ships, by Group, 2017-2032 (USD Thousand)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 8. Global Cable Laying Vessel Market Size, by Ships, by Country, 2017-2032 (USD Thousand)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

7.2. Barges

Table 9. Global Cable Laying Vessel Market Size, by Barges, by Region, 2017-2032 (USD Thousand)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 10. Global Cable Laying Vessel Market Size, by Barges, by Group, 2017-2032 (USD Thousand)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 11. Global Cable Laying Vessel Market Size, by Barges, by Country, 2017-2032 (USD Thousand)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

8. Cable Laying Vessel Market, by Mission Configuration

Mission Configuration should reflect the investment brief rather than every task a vessel can perform. ■■■■ ■■■■■■■■■ ■■■■■ ■■ ■■■■■■■■■■■■■ ■■■ ■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■ ■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■ ■■ ■■■■■■ ■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■ ■■ ■■■ ■■■■■ ■■■■■■ ■■ ■■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■ ■■■■■■■■■ ■■■■■■■■■■■ ■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■■■■■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■■ ■ ■■■■■■■■■■■ ■■■■■■■■ ■■■■■ ■ ■■■■■■■■■■■■■■ ■■■■■■■ ■■■■ ■■■ ■■■■■■ ■■■■■■■■■■■ ■■■ ■■■ ■■■■■■ ■■■■■■■■ ■■■■■■ ■■■■■■ Ancillary capability does not erase specialization.

Combined Installation and Repair Vessels require both technical acceptance and an employment arrangement that permits the proposed work. ■■■■■■ ■■■■■■■■■ ■■■■■■ ■■ ■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■ ■■■ ■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■ ■■■ ■■■■■■■■■■ ■■■■■ ■■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■ ■■■■■■■■■ ■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■ ■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■ ■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■ ■■■■■■■ ■■ ■■■■■■■■■ ■■■■■■ ■■■■■■■ ■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■ ■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■ ■■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■ Broader capability offers flexibility only where readiness obligations leave it usable.

Multipurpose Construction Vessels offer a different form of flexibility: changing the mission package. ■■■■■■ ■■■■■■■■■ ■■■■ ■■■■■■■■■■■■ ■■■■■■ ■■■■■■■■ ■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■ ■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■ ■ ■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■ ■■■■■ ■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■ ■■■■■■■■ ■■■■■ ■■■■■■■■■■ ■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■■■ ■■■■■■■■ ■■■■■ ■■■■■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■ Removability creates options, not continuous cable readiness; a dedicated installation vessel is preferable when changing packages would conflict with committed cable work.

Figure 9. Global Cable Laying Vessel Market, by Mission Configuration: Market share evolution, 2025-2032

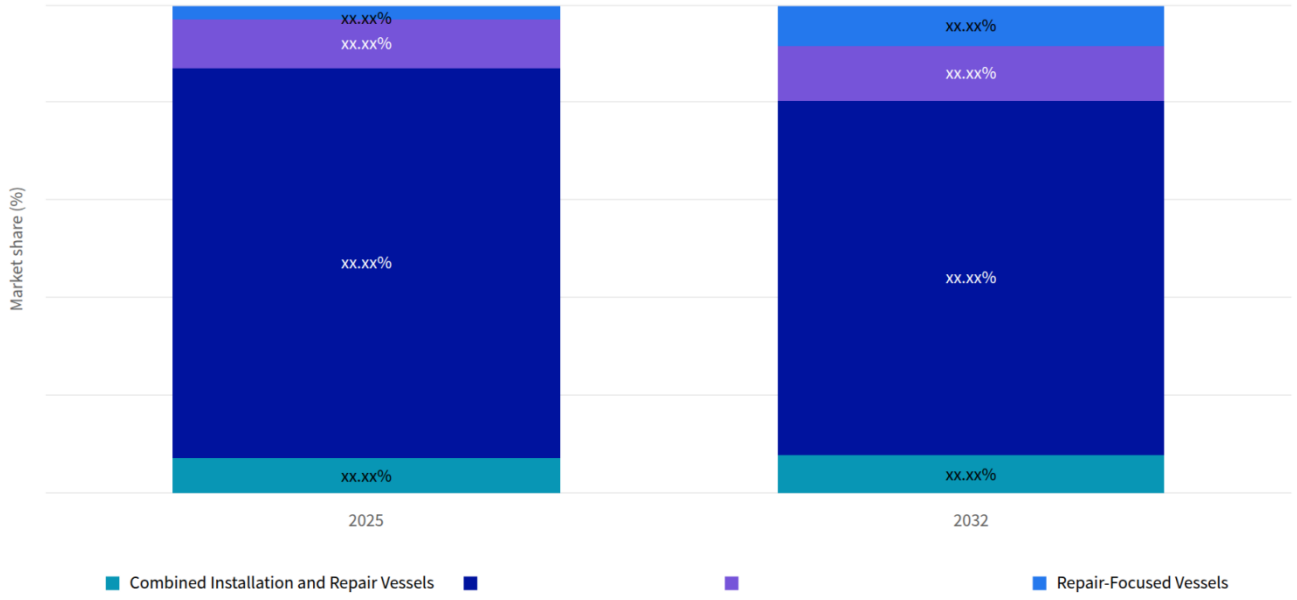

Figure 10. Global Cable Laying Vessel Market, by Mission Configuration: Market size by category, 2025

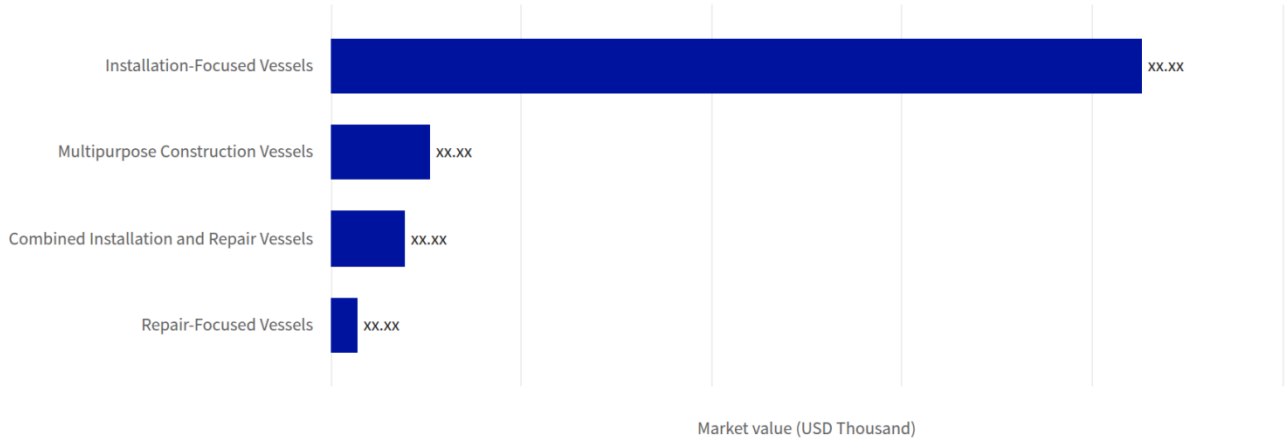

Figure 11. Global Cable Laying Vessel Market, by Mission Configuration: Market size and growth, 2025-2032

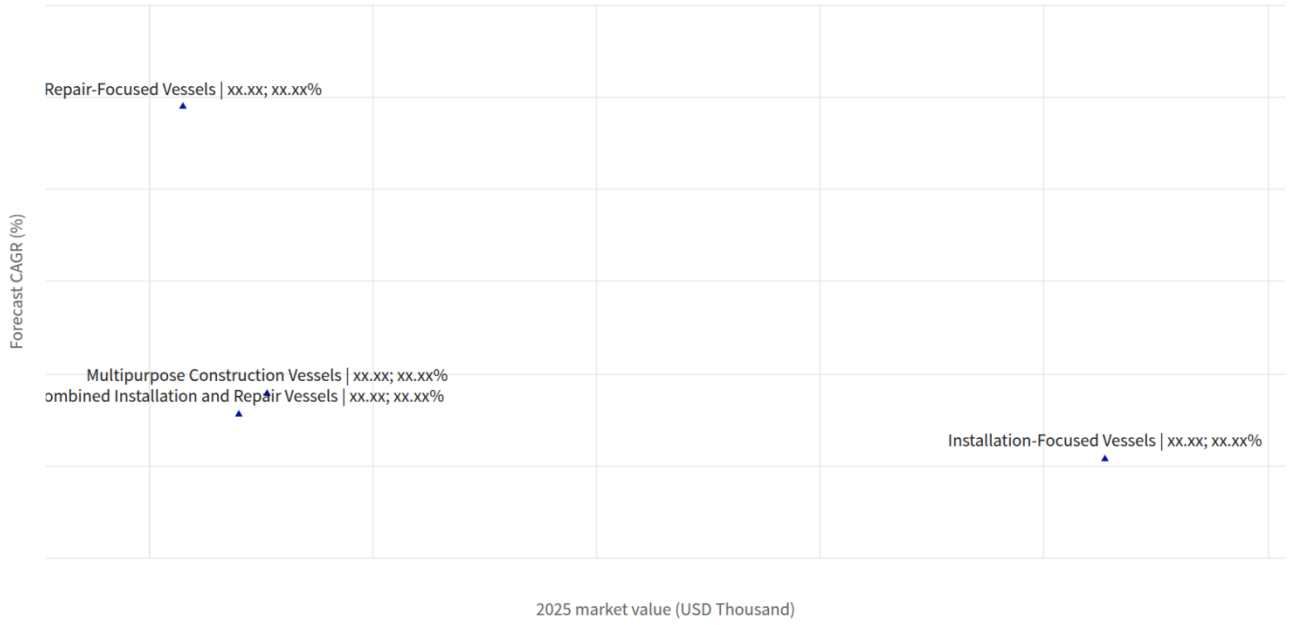

Table 12. Global Cable Laying Vessel Market, by Mission Configuration growth contribution, 2025-2032

Category	2025 value (USD Thousand)	2032 value (USD Thousand)	Added value (USD Thousand)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Combined Installation and Repair Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Installation-Focused Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multipurpose Construction Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Repair-Focused Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 13. Global Cable Laying Vessel Market Size, by Mission Configuration, 2017-2032 (USD Thousand)

Mission Configuration	2023	2024	2025	2026	2027	2032	CAGR (%)
Combined Installation and Repair Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Installation-Focused Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multipurpose Construction Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Repair-Focused Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Subsea Cable Maintenance
   · Global Marine describes dedicated maintenance vessels, depots, callout commitments, and approval requirements for certain outside installation work. Cross-mission availability implications are analytical. ([globalmarine.co.uk](https://globalmarine.co.uk/services/subsea-cable-maintenance/))
2. Freja Awarded Best Cable Laying Vessel of the Year
   · VARD identifies Freja as purpose-built for subsea installation and specifically designed for renewable-energy inter-array cable work. No award-based superiority claim is used. ([vard.com](https://www.vard.com/articles/freja-awarded-best-cable-laying-vessel-of-the-year))
3. How We Power Global Subsea Connectivity with Orange Marine
   · Orange identifies Sophie Germain's principal mission as cable repair while confirming retained capability to lay small links. ([wholesale.orange.com](https://wholesale.orange.com/wholesale/en/news/powering-global-subsea-connectivity-with-orange-marine.html))
4. Pierre de Fermat
   · VARD identifies Pierre de Fermat as a delivered cable-laying and repair vessel with installed cable equipment. The reference does not establish equal procurement priority for the missions. ([vard.com](https://www.vard.com/shipbuilding/references/pierre-de-fermat))
5. Delivery of Cable Laying Vessel to Toyo Construction
   · VARD's Toyo delivery disclosure identifies removable cable-lay equipment, cranes, and foundation, floating-wind mooring, and marine-resource construction roles. Configuration-change prerequisites are conditional commercial implications. ([vard.com](https://www.vard.com/press-releases/delivery-of-cable-laying-vessel-to-toyo-construction))

8.1. Installation-Focused Vessels

Table 14. Global Cable Laying Vessel Market Size, by Installation-Focused Vessels, by Region, 2017-2032 (USD Thousand)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 15. Global Cable Laying Vessel Market Size, by Installation-Focused Vessels, by Group, 2017-2032 (USD Thousand)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 16. Global Cable Laying Vessel Market Size, by Installation-Focused Vessels, by Country, 2017-2032 (USD Thousand)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

8.2. Multipurpose Construction Vessels

Table 17. Global Cable Laying Vessel Market Size, by Multipurpose Construction Vessels, by Region, 2017-2032 (USD Thousand)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 18. Global Cable Laying Vessel Market Size, by Multipurpose Construction Vessels, by Group, 2017-2032 (USD Thousand)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 19. Global Cable Laying Vessel Market Size, by Multipurpose Construction Vessels, by Country, 2017-2032 (USD Thousand)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

8.3. Combined Installation and Repair Vessels

Table 20. Global Cable Laying Vessel Market Size, by Combined Installation and Repair Vessels, by Region, 2017-2032 (USD Thousand)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 21. Global Cable Laying Vessel Market Size, by Combined Installation and Repair Vessels, by Group, 2017-2032 (USD Thousand)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 22. Global Cable Laying Vessel Market Size, by Combined Installation and Repair Vessels, by Country, 2017-2032 (USD Thousand)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

8.4. Repair-Focused Vessels

Table 23. Global Cable Laying Vessel Market Size, by Repair-Focused Vessels, by Region, 2017-2032 (USD Thousand)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 24. Global Cable Laying Vessel Market Size, by Repair-Focused Vessels, by Group, 2017-2032 (USD Thousand)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 25. Global Cable Laying Vessel Market Size, by Repair-Focused Vessels, by Country, 2017-2032 (USD Thousand)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

9. Cable Laying Vessel Market, by Cable Compatibility

Power Cables Only, Communications Cables Only, and Sensing Cables Only describe affirmative compatibility boundaries, not the owner's customer sector. ■■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■ ■■■■■ ■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■ ■■■■ ■■■■■■■ ■■■■■ ■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■ ■■■■■ ■■■ ■■■■■■■ ■■ ■■■■■■■■■■■■■■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■■■■■■■ ■■■■ ■■■■■ ■■■■■■■■■■ Buyers should require delivered handling specifications to substantiate an exclusive-family claim rather than infer it from a project reference or corporate specialization.

Sensing compatibility needs a separate acceptance case even where the cable resembles a communications product. ■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■ ■■■■■ ■■■■■■ ■■■■■ ■■■ ■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■■■ ■■ ■■ ■■■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■ ■■■■■■ ■■■■■ ■■■■■■■■■■■■ ■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■■■ For sensor-enabled communications work, communications experience is relevant but does not independently establish acceptance of the combined product.

Multiple Cable Families can support wider assignment choice when the delivered equipment genuinely accommodates the required products. Ulstein's Nexans Electra reference combines a high-voltage cable mission with separate fiber-optic storage, providing a documented power-and-optical arrangement without establishing universal sensing compatibility. ■■■ ■■■■■■■■■ ■■■■ ■■■■■■■■ ■■■■ ■■■■■■■■■■■■■■ ■■■ ■■■■■■■ ■■■■■ ■■■■■■■■■■■ ■■■■■■■ ■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■■■■■ ■■■■■ ■■■■■■■ ■■■ ■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■■■ ■■ ■■■■ ■■■■■■■■■■ ■■■■ ■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■ ■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■ ■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■

Figure 12. Global Cable Laying Vessel Market Size, by Cable Compatibility, 2025 vs 2032 (%)

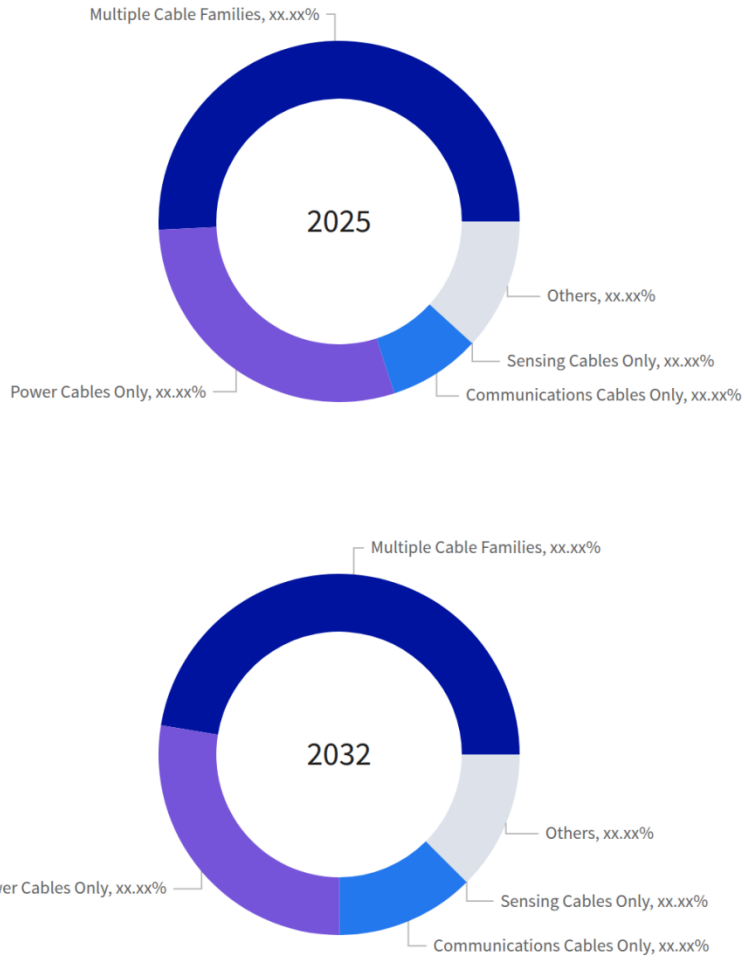

Figure 13. Global Cable Laying Vessel Market, by Cable Compatibility: Market size by category, 2025

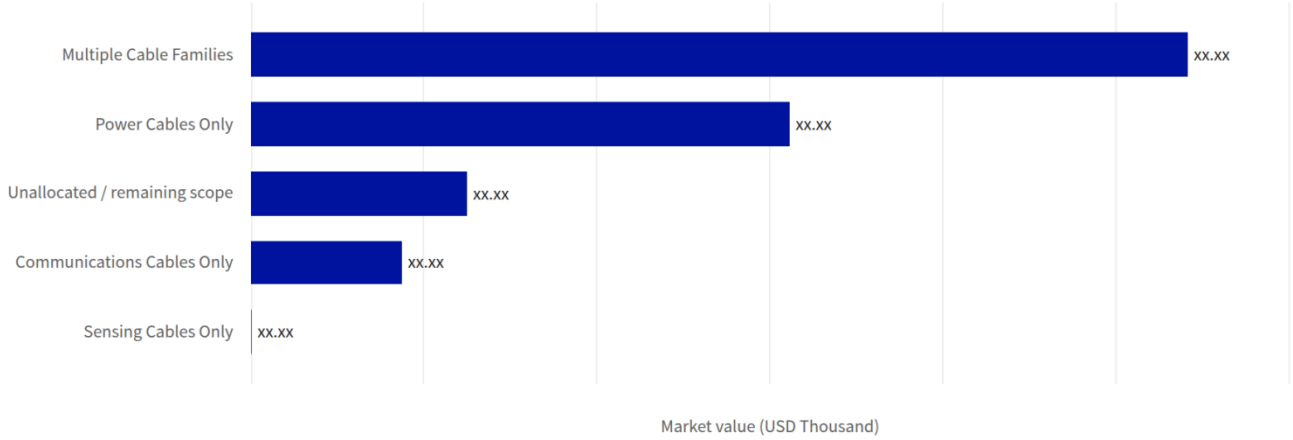

Figure 14. Global Cable Laying Vessel Market, by Cable Compatibility: Market size and growth, 2025-2032

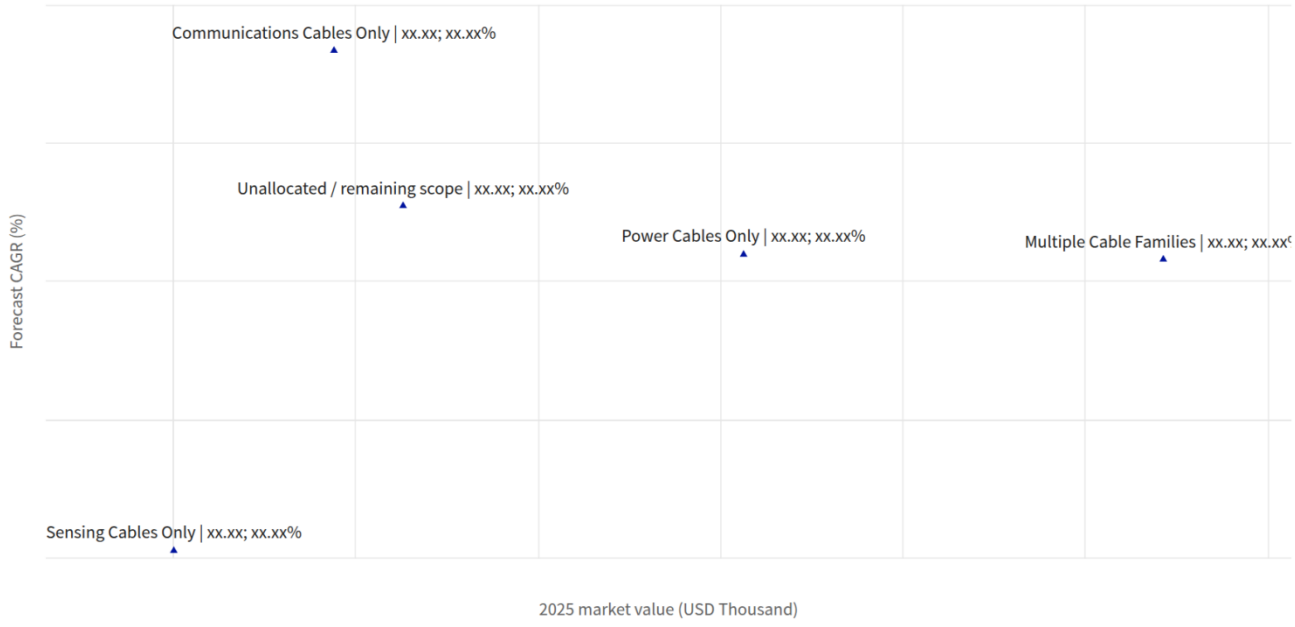

Table 26. Global Cable Laying Vessel Market, by Cable Compatibility growth contribution, 2025-2032

Category	2025 value (USD Thousand)	2032 value (USD Thousand)	Added value (USD Thousand)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Communications Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multiple Cable Families	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Power Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sensing Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unallocated / remaining scope	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 27. Global Cable Laying Vessel Market Size, by Cable Compatibility, 2017-2032 (USD Thousand)

Cable Compatibility	2023	2024	2025	2026	2027	2032	CAGR (%)
Communications Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multiple Cable Families	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Power Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sensing Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Offshore Quadrant Handling Systems
   · Royal IHC's offshore power-cable quadrant offering specifically addresses maintaining minimum bend radius, supporting cable-specific geometric compatibility review without publishing operating parameters. ([royalihc.com](https://www.royalihc.com/offshore-energy/offshore-equipment/offshore-power-cable-lay/offshore-quadrant-handling-systems))
2. NTT Communications, NTTWEM and NTT FINANCE Launch New Submarine Cable-Laying Ship Kizuna
   · NTT's Kizuna announcement specifies communications-network cable laying and maintenance, but does not establish a communications-exclusive handling restriction. ([ntt.com](https://www.ntt.com/en/about-us/press-releases/news/article/2016/xx.xx.html))
3. ITU-T G.9730.1 (08/2024): Dedicated Scientific Sensing Submarine Cable System
   · ITU-T G.xx.xx defines dedicated scientific-sensing submarine systems and recognizes applicable optical cable types. It addresses cable-system architecture, not vessel-specific handling acceptance. ([itu.int](https://www.itu.int/rec/dologin_pub.asp?id=T-REC-G.xx.xx-xx.xx-I%xx.xx%21PDF-E&lang=e&type=items))
4. ITU-T G.9730.2 (08/2024): Scientific Monitoring and Reliable Telecommunication Submarine Cable Systems
   · ITU-T G.xx.xx defines telecommunications cable systems incorporating scientific monitoring, establishing combined cable functions rather than compatibility of a particular vessel. ([itu.int](https://www.itu.int/rec/dologin_pub.asp?id=T-REC-G.xx.xx-xx.xx-I%xx.xx%21PDF-E&lang=e&type=items))

5. Nexans Electra

· Ulstein describes Nexans Electra's high-voltage cable mission and separate fiber-optic storage, while cautioning that specifications may change after completion. Sensing compatibility is not established. ([ulstein.com](https://ulstein.com/references/nexans-electra))

9.1. Multiple Cable Families

Table 28. Global Cable Laying Vessel Market Size, by Multiple Cable Families, by Region, 2017-2032 (USD Thousand)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 29. Global Cable Laying Vessel Market Size, by Multiple Cable Families, by Group, 2017-2032 (USD Thousand)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 30. Global Cable Laying Vessel Market Size, by Multiple Cable Families, by Country, 2017-2032 (USD Thousand)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

9.2. Power Cables Only

Table 31. Global Cable Laying Vessel Market Size, by Power Cables Only, by Region, 2017-2032 (USD Thousand)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 32. Global Cable Laying Vessel Market Size, by Power Cables Only, by Group, 2017-2032 (USD Thousand)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 33. Global Cable Laying Vessel Market Size, by Power Cables Only, by Country, 2017-2032 (USD Thousand)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

9.3. Communications Cables Only

Table 34. Global Cable Laying Vessel Market Size, by Communications Cables Only, by Region, 2017-2032 (USD Thousand)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 35. Global Cable Laying Vessel Market Size, by Communications Cables Only, by Group, 2017-2032 (USD Thousand)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 36. Global Cable Laying Vessel Market Size, by Communications Cables Only, by Country, 2017-2032 (USD Thousand)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

9.4. Sensing Cables Only

Table 37. Global Cable Laying Vessel Market Size, by Sensing Cables Only, by Region, 2017-2032 (USD Thousand)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 38. Global Cable Laying Vessel Market Size, by Sensing Cables Only, by Group, 2017-2032 (USD Thousand)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 39. Global Cable Laying Vessel Market Size, by Sensing Cables Only, by Country, 2017-2032 (USD Thousand)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

10. Cable Laying Vessel Market, by Station-Keeping System

[redacted] The required class is linked to a mission-specific assessment involving the company, customer, and relevant authority. Additional redundancy and segregation create integration obligations, but a higher class does not establish cable-family compatibility or acceptance for every assignment.

[redacted] For that category, buyers need affirmative documentation of automatic position control and its boundary outside the assigned IMO classes; an undocumented DP level is insufficient. ASEAN Restorer's specification also retains DP1 classification despite retrofitted control stations, illustrating why station count is not a substitute for the assigned class.

Anchored or Moored Positioning changes the support and site-access requirements when it supplies the working position. [redacted] Listing mooring equipment alone does not establish that independent automatic positioning is absent, and towing to the worksite does not establish the principal asset's working-position method.

Seabed-Supported Positioning has documented campaign relevance: the Gwynt y Mor repair notice describes towed jack-up barges used for cable transportation, laying, and jointing, with preparatory surveys around the proposed locations. [redacted] Where those dependencies cannot be secured, buyers should compare a documented integrated positioning alternative rather than assume nominal vessel access is sufficient.

Figure 15. Global Cable Laying Vessel Market, by Station-Keeping System: Market share evolution, 2025-2032

Figure 16. Global Cable Laying Vessel Market, by Station-Keeping System: Market size by category, 2025

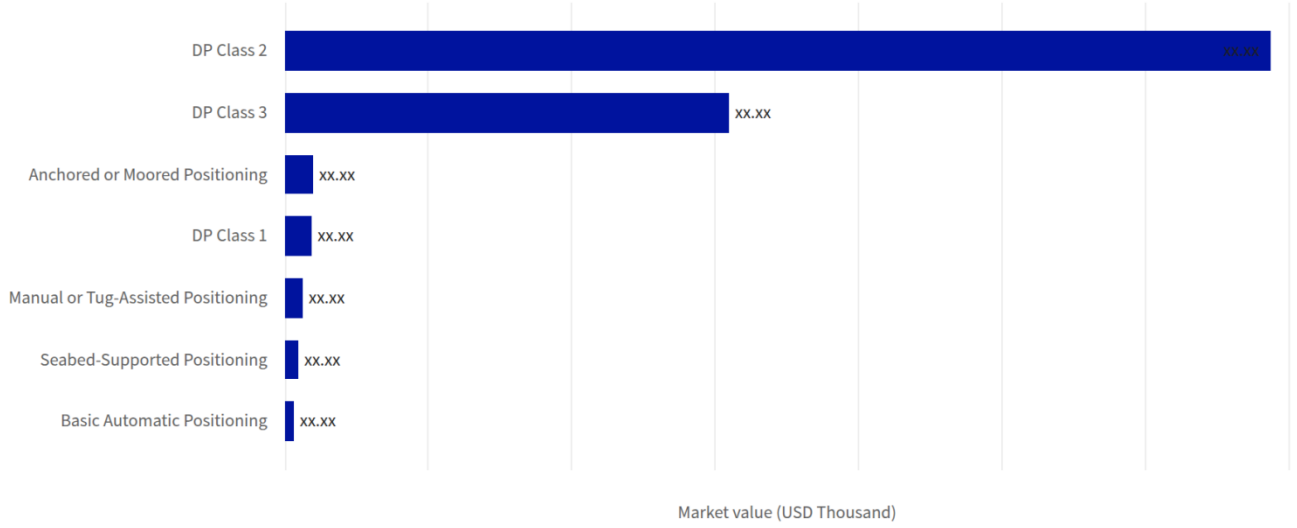

Figure 17. Global Cable Laying Vessel Market, by Station-Keeping System: Market size and growth, 2025-2032

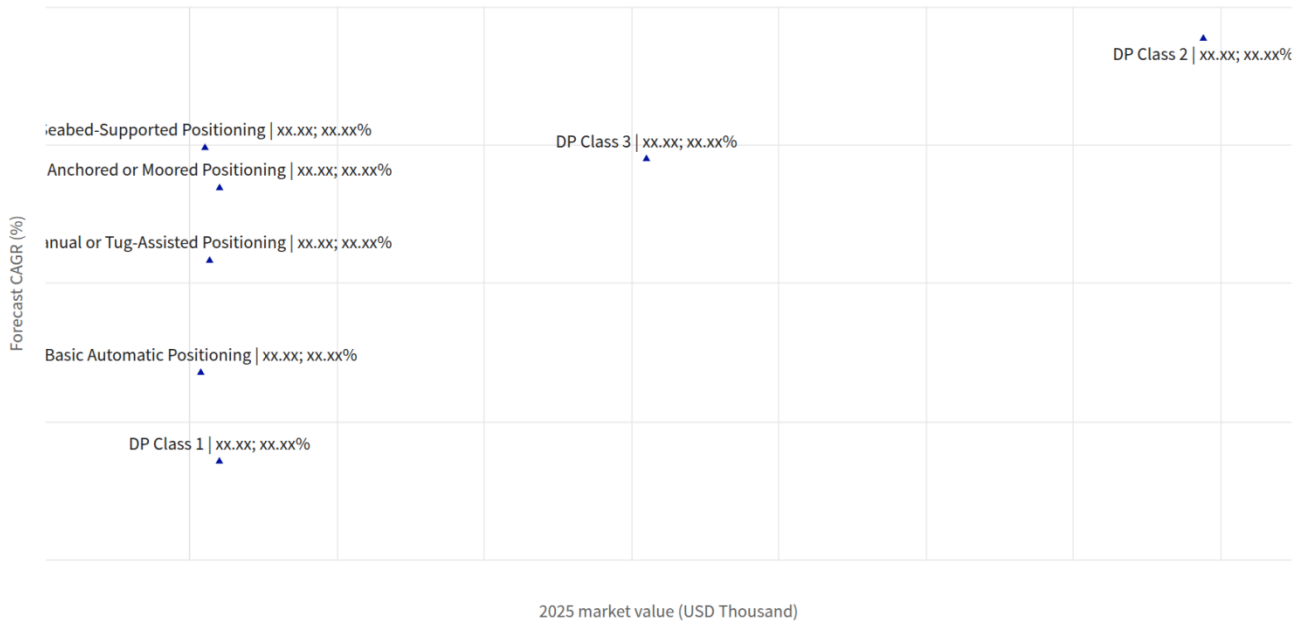

Table 40. Global Cable Laying Vessel Market, by Station-Keeping System growth contribution, 2025-2032

Category	2025 value (USD Thousand)	2032 value (USD Thousand)	Added value (USD Thousand)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Anchored or Moored Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Basic Automatic Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manual or Tug-Assisted Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Seabed-Supported Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 41. Global Cable Laying Vessel Market Size, by Station-Keeping System, 2017-2032 (USD Thousand)

Station-Keeping System	2023	2024	2025	2026	2027	2032	CAGR (%)
Anchored or Moored Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Basic Automatic Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manual or Tug-Assisted Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Seabed-Supported Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Commercial Shipbuilding: Selected Offshore Wind Projects Used a Mix of U.S. and Foreign Vessels, Spurring Some Shipbuilding Investments
   · GAO documents supporting tugs towing cable-laying barges and handling their anchors; those activities do not independently establish onboard working-position control. ([files.gao.gov](https://files.gao.gov/reports/GAO-xx.xx-xx.xx/index.html))
2. Ship Conversion Project for Cable Laying Barge
   · The delivered conversion included installed positional mooring. This supports a moored configuration example, not affirmative exclusion of independent automatic positioning. ([vgrouplimited.com](https://vgrouplimited.com/case-study/engineering/))
3. ABS Guide for Dynamic Positioning Systems - February 2024
   · ABS maps DPS-xx.xx DPS-xx.xx and DPS-xx.xx to IMO equipment classes xx.xx xx.xx and xx.xx. DPS-xx.xx is manual position control with automatic heading, not evidence of automatic position control. ([ww2.eagle.org](https://ww2.eagle.org/content/dam/eagle/rules-and-guides/current/other/xx.xx-guide-for-dynamic-positioning-systems-2024/xx.xx-dps-guide-feb24.pdf))
4. ClassNK Technical Information T1127: IMO MSC.1/Circ.1580 Guidelines for Vessels and Units with Dynamic Positioning Systems
   · IMO MSC.xx.xx/Circ.xx.xx distinguishes equipment classes through single-failure and compartment-failure criteria, links required class to mission consequences, and provides for documented class assignment. ([classnk.or.jp](https://www.classnk.or.jp/hp/pdf/tech_info/tech_img/T1127j.pdf))
5. Gwynt y Mor OFTO - Stage 3 Repair Notice
   · The Gwynt y Mor notice describes towed jack-up barges used for cable transport, laying, and jointing, with surveys around proposed locations. This establishes campaign use, not integrated capital-delivery scope. ([ofgem.gov.uk](https://www.ofgem.gov.uk/sites/default/files/2024-xx.xx/241022_SSEC3_IAE_Notice_Stage3Repair_REDACT%xx.xx%28published%xx.xx.pdf))
6. CS ASEAN Restorer
   · ASEAN Restorer's specification expressly retains DP1 classification despite retrofitted DP control stations, supporting verification by assigned class rather than station count. ([aseancableship.com](https://www.aseancableship.com/our_resources/cs-asean-restorer/))

10.1. DP Class 2

Table 42. Global Cable Laying Vessel Market Size, by DP Class xx.xx by Region, 2017-2032 (USD Thousand)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 43. Global Cable Laying Vessel Market Size, by DP Class xx.xx by Group, 2017-2032 (USD Thousand)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 44. Global Cable Laying Vessel Market Size, by DP Class xx.xx by Country, 2017-2032 (USD Thousand)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

10.2. DP Class 3

Table 45. Global Cable Laying Vessel Market Size, by DP Class xx.xx by Region, 2017-2032 (USD Thousand)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 46. Global Cable Laying Vessel Market Size, by DP Class xx.xx by Group, 2017-2032 (USD Thousand)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 47. Global Cable Laying Vessel Market Size, by DP Class xx.xx by Country, 2017-2032 (USD Thousand)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

10.3. Anchored or Moored Positioning

Table 48. Global Cable Laying Vessel Market Size, by Anchored or Moored Positioning, by Region, 2017-2032 (USD Thousand)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 49. Global Cable Laying Vessel Market Size, by Anchored or Moored Positioning, by Group, 2017-2032 (USD Thousand)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 50. Global Cable Laying Vessel Market Size, by Anchored or Moored Positioning, by Country, 2017-2032 (USD Thousand)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

10.4. DP Class 1

Table 51. Global Cable Laying Vessel Market Size, by DP Class xx.xx by Region, 2017-2032 (USD Thousand)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 52. Global Cable Laying Vessel Market Size, by DP Class xx.xx by Group, 2017-2032 (USD Thousand)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 53. Global Cable Laying Vessel Market Size, by DP Class xx.xx by Country, 2017-2032 (USD Thousand)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

10.5. Manual or Tug-Assisted Positioning

Table 54. Global Cable Laying Vessel Market Size, by Manual or Tug-Assisted Positioning, by Region, 2017-2032 (USD Thousand)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 55. Global Cable Laying Vessel Market Size, by Manual or Tug-Assisted Positioning, by Group, 2017-2032 (USD Thousand)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 56. Global Cable Laying Vessel Market Size, by Manual or Tug-Assisted Positioning, by Country, 2017-2032 (USD Thousand)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

10.6. Seabed-Supported Positioning

Table 57. Global Cable Laying Vessel Market Size, by Seabed-Supported Positioning, by Region, 2017-2032 (USD Thousand)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 58. Global Cable Laying Vessel Market Size, by Seabed-Supported Positioning, by Group, 2017-2032 (USD Thousand)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 59. Global Cable Laying Vessel Market Size, by Seabed-Supported Positioning, by Country, 2017-2032 (USD Thousand)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

10.7. Basic Automatic Positioning

Table 60. Global Cable Laying Vessel Market Size, by Basic Automatic Positioning, by Region, 2017-2032 (USD Thousand)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 61. Global Cable Laying Vessel Market Size, by Basic Automatic Positioning, by Group, 2017-2032 (USD Thousand)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 62. Global Cable Laying Vessel Market Size, by Basic Automatic Positioning, by Country, 2017-2032 (USD Thousand)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

11. Cable Laying Vessel Market, by Onboard Power Architecture

Electric propulsion does not by itself distinguish Conventional Engine-Based Power from Hybrid Electric Power or All-Electric Power. ■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■■ ■■■■ ■■■■■■■■■■■■ ■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■ ■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■ ■■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■■■ ■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■ ■■ ■■■ ■■■■■■■ ■■ ■■■■■■■ Buyers should obtain the installed power-source and storage configuration before accepting an architecture label; a generator listing does not independently establish the absence of supplementary storage.

Hybrid Electric Power has vessel-level implementation evidence. ■■■ ■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■■■ ■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■ ■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■ ■■■■■■■■■■■ ■■■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■■■ ■■■ ■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■ ■ ■■■■■■■ ■■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■ ■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■ ■■■ ■■■■■■ ■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■ ■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■■ ■■ ■■■■■■■■■■■■ ■■■■■■■■ Hybrid flexibility also introduces integration and continuing support responsibilities.

All-Electric Power requires a different acceptance boundary. ■■■■■ ■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■ ■■■■■■ ■■■■■ ■■■■■■ ■■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■■■ ■■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■■■ ■■ ■■■■■ ■■■■■■■■■■■■ ■■■■ ■■■■■ ■■■■■■ ■■■■■■■ ■■ ■■■■■■■■■ ■■■■■■■■■■■■■■ ■■■■ ■■■ ■ ■■■■■■■■ ■■■■■■■■■■■■■■ ■■■■■■■■■■■■■ If normal mission power still depends on combustion generation, an electric-drive or hybrid description is the more defensible comparison.

■■■■■■ ■■■■■■■■■■ ■■ ■■■ ■■■■■■ ■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■■■■■■ ■■■ ■■■ ■■■■■■■■■■■ ■■■■■■ ■■ ■■■■■■ ■■ ■■■■■■
The announcement establishes an electric-drive project, not completed whole-vessel mission acceptance or proof that normal power excludes combustion generation. Procurement decisions should follow integrated power documentation and accepted duty capability rather than promote a launch description into an all-electric delivery claim.

Figure 18. Global Cable Laying Vessel Market, by Onboard Power Architecture: Market share evolution, 2025-2032

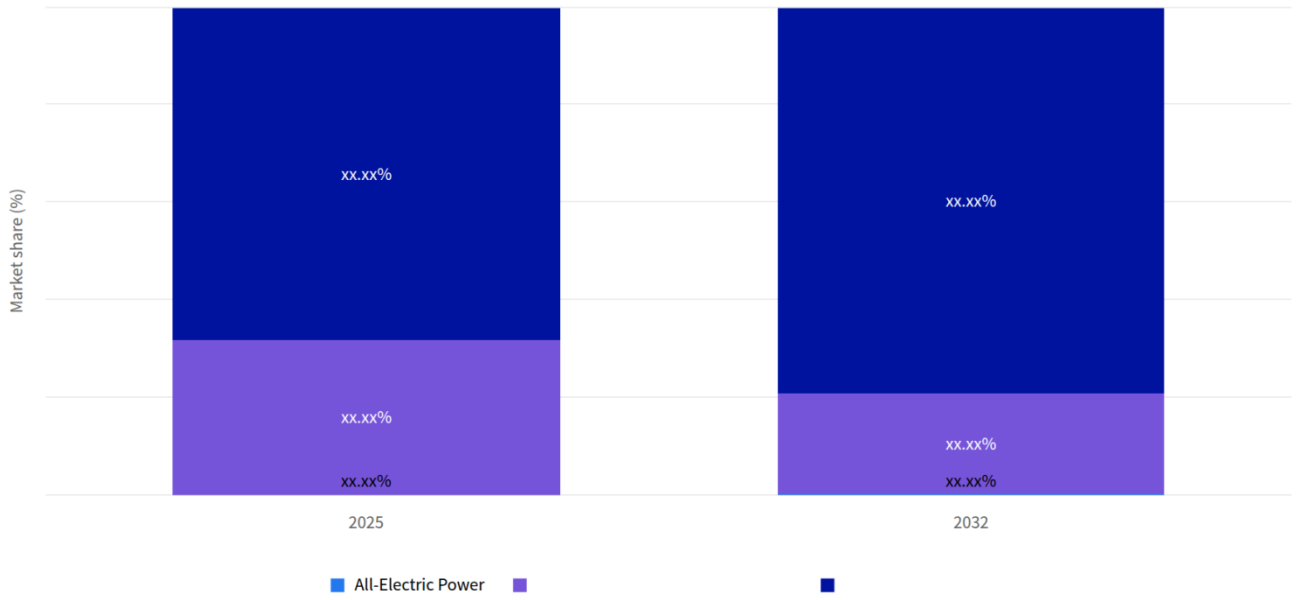

Figure 19. Global Cable Laying Vessel Market, by Onboard Power Architecture: Market size by category, 2025

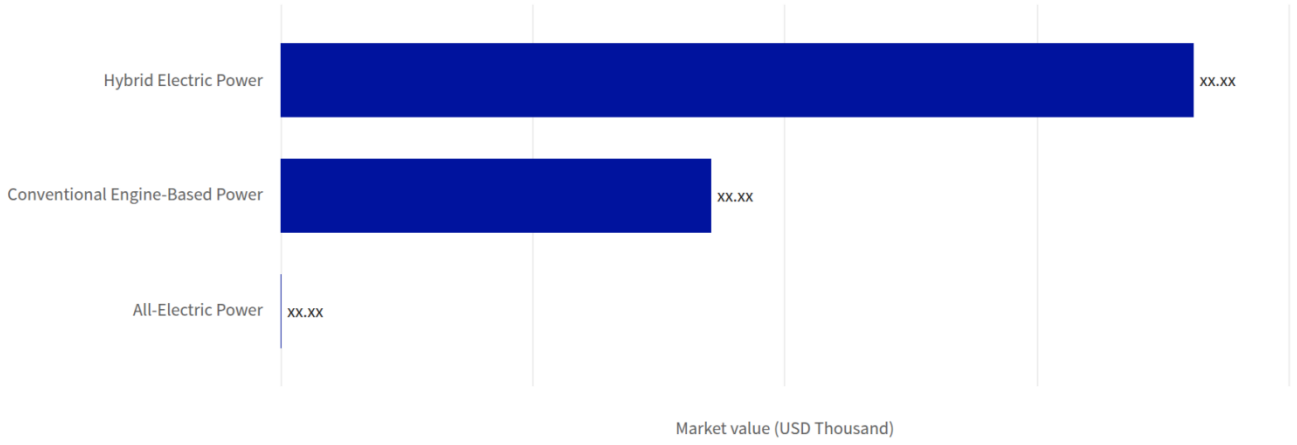

Figure 20. Global Cable Laying Vessel Market, by Onboard Power Architecture: Market size and growth, 2025-2032

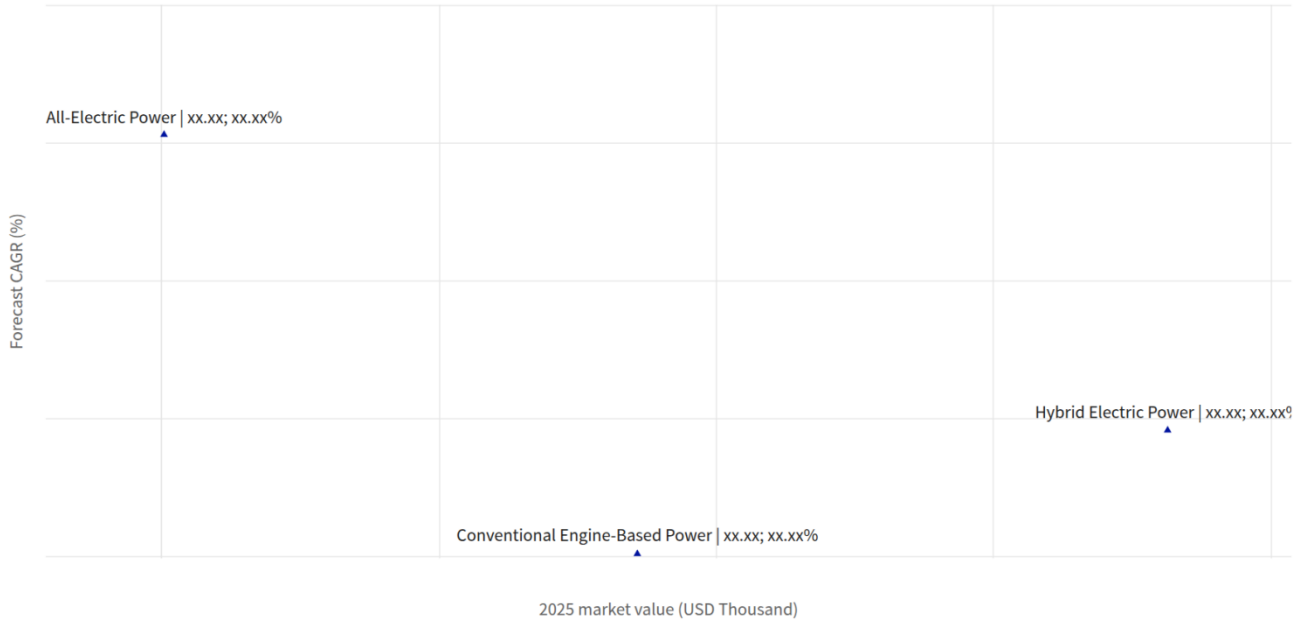

Table 63. Global Cable Laying Vessel Market, by Onboard Power Architecture growth contribution, 2025-2032

Category	2025 value (USD Thousand)	2032 value (USD Thousand)	Added value (USD Thousand)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
All-Electric Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Conventional Engine-Based Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Electric Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 64. Global Cable Laying Vessel Market Size, by Onboard Power Architecture, 2017-2032 (USD Thousand)

Onboard Power Architecture	2023	2024	2025	2026	2027	2032	CAGR (%)
All-Electric Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Conventional Engine-Based Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Electric Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. The Damen CLV: a new generation of cable layer
   · Damen's proposed hybrid cable-layer design describes batteries and electrical sailing for short periods. It is design-stage evidence, not completed full-mission all-electric acceptance. ([damen.com](https://www.damen.com/insights-center/articles/the-damen-clv-a-new-generation-of-cable-layer))
2. Van Oord's cable-laying vessel Calypso makes its debut and is now fully operational
   · Van Oord's October xx.xx 2024 operational announcement describes Calypso's hybrid engines, batteries, shore connection, and energy management. These features do not establish full-mission environmental outcomes. ([vanoord.com](https://www.vanoord.com/drupal/media/data/default/2024-xx.xx/Press%20release%xx.xx-%20Van%20Oord%E2%xx.xx%99s%20cable-laying%20vessel%20Calypso%20makes%20its%20debut%20and%20is%20now%20fully%20operational%20_0.pdf))
3. CS ASEAN Restorer
   · The operator lists electric propulsion drives and main and auxiliary generators. This establishes generator-fed electric machinery, not affirmative exclusion of supplementary storage. ([aseancableship.com](https://www.aseancableship.com/our_resources/cs-asean-restorer/))
4. ABS Requirements for Hybrid and All-Electric Power Systems for Marine and Offshore Applications - April 2024
   · ABS's 2024 requirements distinguish installed and ready architectures, exclude engine-driven generators alone from hybrid qualification, and restrict combustion generation in all-electric systems to emergency use. Mission-energy verification is a commercial implication. ([ww2.eagle.org](https://ww2.eagle.org/content/dam/eagle/rules-and-guides/current/conventional_ocean_service/xx.xx-requirements-for-hybrid-electric-power-systems-for-marine-and-offshore-applications-2024/xx.xx-hybrid-electric-power-systems-reqts-Apr24.pdf))
5. 向深远海铺设“电力动脉”！国内最大纯电驱海缆敷设船下水→
   · Shanghai's science and technology authority reports Lan Hai Linghang's electric-drive launch on August xx.xx 2026. The announcement does not establish completed mission acceptance or normal-generation exclusions. ([stcsm.sh.gov.cn](https://stcsm.sh.gov.cn/xwzx/mtjj/xx.xx/9b60388dc02048f38348303c29b4ac4f.html))

11.1. Hybrid Electric Power

Table 65. Global Cable Laying Vessel Market Size, by Hybrid Electric Power, by Region, 2017-2032 (USD Thousand)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 66. Global Cable Laying Vessel Market Size, by Hybrid Electric Power, by Group, 2017-2032 (USD Thousand)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 67. Global Cable Laying Vessel Market Size, by Hybrid Electric Power, by Country, 2017-2032 (USD Thousand)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

11.2. Conventional Engine-Based Power

Table 68. Global Cable Laying Vessel Market Size, by Conventional Engine-Based Power, by Region, 2017-2032 (USD Thousand)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 69. Global Cable Laying Vessel Market Size, by Conventional Engine-Based Power, by Group, 2017-2032 (USD Thousand)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 70. Global Cable Laying Vessel Market Size, by Conventional Engine-Based Power, by Country, 2017-2032 (USD Thousand)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

11.3. All-Electric Power

Table 71. Global Cable Laying Vessel Market Size, by All-Electric Power, by Region, 2017-2032 (USD Thousand)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 72. Global Cable Laying Vessel Market Size, by All-Electric Power, by Group, 2017-2032 (USD Thousand)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 73. Global Cable Laying Vessel Market Size, by All-Electric Power, by Country, 2017-2032 (USD Thousand)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

12. Cable Laying Vessel Market, by Infrastructure Application

Infrastructure Application differentiates the investment mandate behind the vessel, not merely the cable it can carry. [redacted] Buyers should distinguish a principal application from anticipated additional employment rather than treat technical versatility as a change in investment purpose.

Telecommunications Networks have documented newbuild and conversion procurement pathways. [redacted] For builders, the relevant requirement is the acquiring operator's installation or maintenance mandate, including the chosen asset pathway; the communications infrastructure customer need not be the organization purchasing the vessel.

Industrial Infrastructure and Scientific and Environmental Monitoring also create cable-vessel requirements without necessarily creating dedicated vessel purchases. The BOEM-hosted ExxonMobil project analysis specifies a cable-installation vessel for replacement power cables serving offshore production infrastructure. [redacted]

[redacted] This documents defense procurement planning, not an awarded construction contract or an appropriation determination. Suppliers should verify funded acquisition authority and the actual specification before reserving construction capacity; an obligation to maintain cable-service access does not establish the chosen asset solution.

[redacted]

[redacted] The trade-off is broader assignment choice against a more complex requirement set. A focused investment remains preferable when only one application has a substantiated asset commitment; the application categories are alternative views of the same vessel investment, not additive opportunities.

Figure 21. Global Cable Laying Vessel Market Size, by Infrastructure Application, 2025 vs 2032 (%)

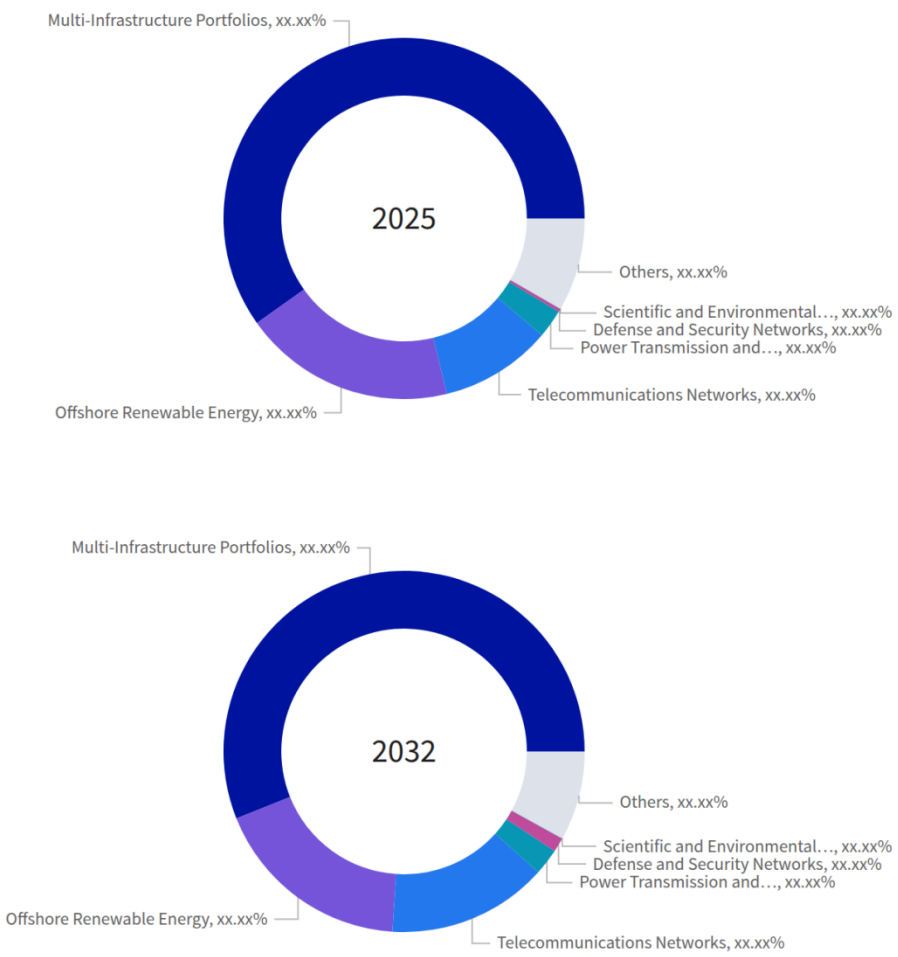

Figure 22. Global Cable Laying Vessel Market, by Infrastructure Application: Market size by category, 2025

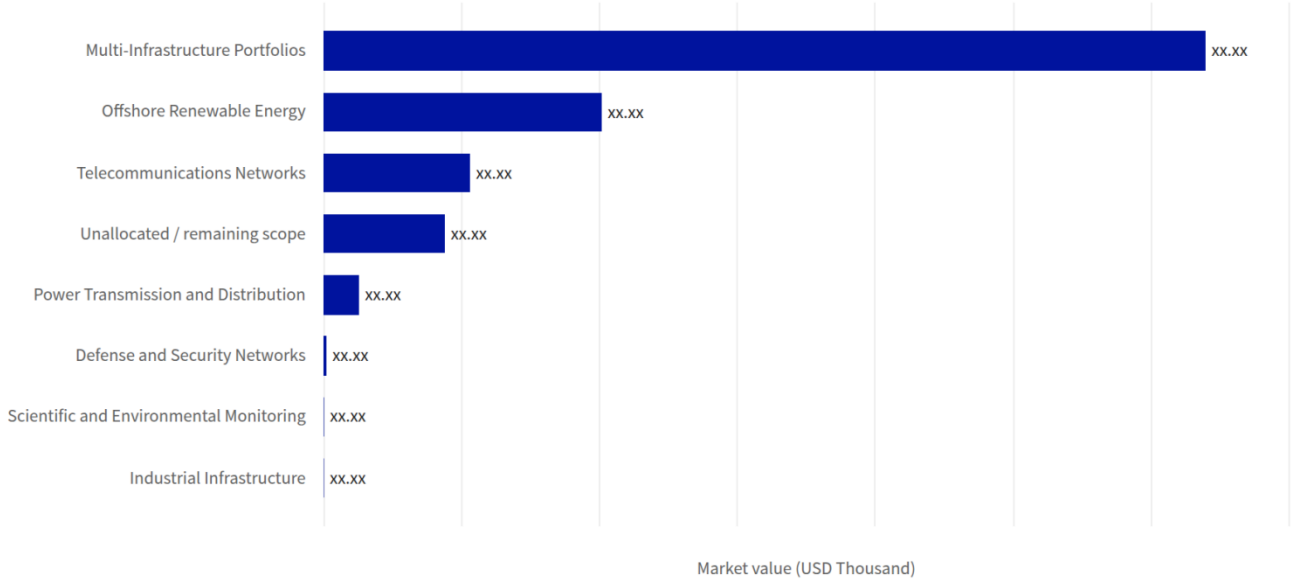

Figure 23. Global Cable Laying Vessel Market, by Infrastructure Application: Market size and growth, 2025-2032

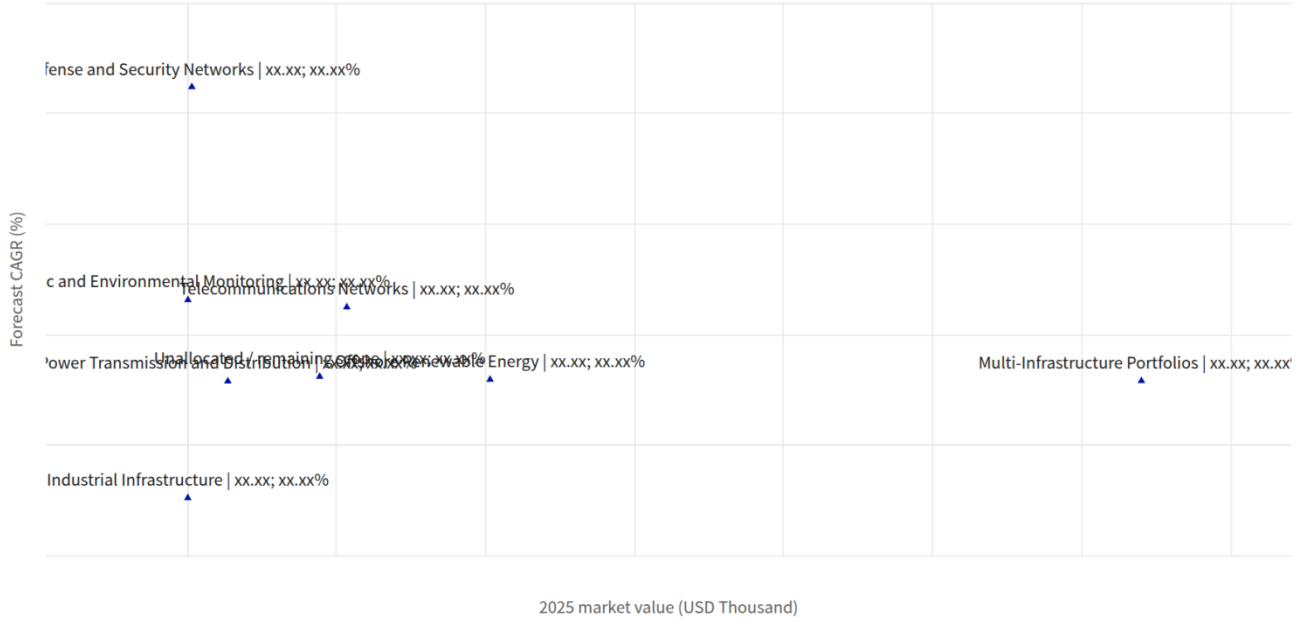

Table 74. Global Cable Laying Vessel Market, by Infrastructure Application growth contribution, 2025-2032

Category	2025 value (USD Thousand)	2032 value (USD Thousand)	Added value (USD Thousand)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Defense and Security Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Industrial Infrastructure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Infrastructure Portfolios	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Offshore Renewable Energy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Power Transmission and Distribution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scientific and Environmental Monitoring	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Telecommunications Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unallocated / remaining scope	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 75. Global Cable Laying Vessel Market Size, by Infrastructure Application, 2017-2032 (USD Thousand)

Infrastructure Application	2023	2024	2025	2026	2027	2032	CAGR (%)
Defense and Security Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Industrial Infrastructure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Infrastructure Portfolios	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Offshore Renewable Energy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Power Transmission and Distribution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scientific and Environmental Monitoring	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Telecommunications Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Nexans to build third generation cable laying vessel to drive global energy transition
   · Nexans' July xx.xx 2023 vessel-investment announcement explicitly links offshore wind and interconnection work to the asset decision, supporting an affirmative multi-infrastructure rationale without application allocation estimates. ([nexans.com](https://www.nexans.com/press-releases/nexans-to-build-third-generation-cable-laying-vessel-to-drive-global-energy-transition/))
2. NTT Communications, NTTWEM and NTT FINANCE Launch New Submarine Cable-Laying Ship Kizuna
   · The November xx.xx 2016 launch announcement identifies intended NTT FINANCE ownership and leasing to the marine operator for network-cable laying and maintenance. It is a launch-stage procurement example. ([ntt.com](https://www.ntt.com/en/about-us/press-releases/news/article/2016/xx.xx.html))
3. ITU-T G.9730.2 (08/2024): Scientific Monitoring and Reliable Telecommunication Submarine Cable Systems
   · SMART systems retain telecommunications while adding scientific monitoring. Inferring a vessel's principal investment application from sensing content alone is therefore unsupported. ([itu.int](https://www.itu.int/rec/dologin_pub.asp?id=T-REC-G.xx.xx-xx.xx-I%xx.xx%21PDF-E&lang=e&type=items))
4. Notice Regarding Joint Ownership of Large Work Vessels for Offshore Wind Construction
   · Penta-Ocean's January xx.xx 2025 announcement links a contracted cable-vessel investment to offshore-wind construction while anticipating submarine direct-current transmission assignments. Additional use does not erase the stated investment rationale. ([penta-ocean.co.jp](https://www.penta-ocean.co.jp/english/updates/2025/xx.xx-xx.xx.html))
5. IT Infinity - From PSV to State-of-the-Art Cable-Laying Vessel
   · VARD documents IT Infinity's December 2024 conversion delivery and explicitly connects the transformed cable-laying vessel to subsea telecommunications. ([vard.com](https://www.vard.com/cases/it-infinity))

6. ExxonMobil Offshore Power System Reliability Project-B - Environmental Impact Analysis, Attachment E
   · The ExxonMobil project analysis hosted by BOEM specifies a cable-installation vessel for replacement offshore power infrastructure. It establishes a proposed installation requirement, not a dedicated vessel purchase. ([boem.gov](https://www.boem.gov/sites/default/files/about-boem/BOEM-Regions/Pacific-Region/Lease-Management/Attachment-E-Environmental-Impacts-Analysis---Part-xx.xx.pdf))
7. Vessel Underway for Ocean Observatories Initiative Cable Installation Work
   · The Ocean Observatories Initiative's June xx.xx 2011 record identifies a commercial cable ship undertaking electro-optical backbone installation for scientific sensors. It does not establish a scientific-purpose vessel acquisition. ([oceanobservatories.org](https://oceanobservatories.org/2011/xx.xx/vessel-underway-for-ocean-observatories-initiative-cable-installation-work/))
8. Congressional Record - House, December 10, 2025: Report on Procurement Strategy for Submarine Cable Laying and Repair Ships
   · The December xx.xx 2025 Congressional Record contains explanatory direction for a Navy replacement-ship procurement strategy, capability review, and interim cable services. It does not establish a construction award or appropriation determination. ([govinfo.gov](https://www.govinfo.gov/content/pkg/CREC-2025-xx.xx-xx.xx/pdf/CREC-2025-xx.xx-xx.xx-pt2-PgH5571-xx.xx.pdf))

12.1. Multi-Infrastructure Portfolios

Table 76. Global Cable Laying Vessel Market Size, by Multi-Infrastructure Portfolios, by Region, 2017-2032 (USD Thousand)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 77. Global Cable Laying Vessel Market Size, by Multi-Infrastructure Portfolios, by Group, 2017-2032 (USD Thousand)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 78. Global Cable Laying Vessel Market Size, by Multi-Infrastructure Portfolios, by Country, 2017-2032 (USD Thousand)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

12.2. Offshore Renewable Energy

Table 79. Global Cable Laying Vessel Market Size, by Offshore Renewable Energy, by Region, 2017-2032 (USD Thousand)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 80. Global Cable Laying Vessel Market Size, by Offshore Renewable Energy, by Group, 2017-2032 (USD Thousand)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 81. Global Cable Laying Vessel Market Size, by Offshore Renewable Energy, by Country, 2017-2032 (USD Thousand)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

12.3. Telecommunications Networks

Table 82. Global Cable Laying Vessel Market Size, by Telecommunications Networks, by Region, 2017-2032 (USD Thousand)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 83. Global Cable Laying Vessel Market Size, by Telecommunications Networks, by Group, 2017-2032 (USD Thousand)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 84. Global Cable Laying Vessel Market Size, by Telecommunications Networks, by Country, 2017-2032 (USD Thousand)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

12.4. Power Transmission and Distribution

Table 85. Global Cable Laying Vessel Market Size, by Power Transmission and Distribution, by Region, 2017-2032 (USD Thousand)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 86. Global Cable Laying Vessel Market Size, by Power Transmission and Distribution, by Group, 2017-2032 (USD Thousand)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 87. Global Cable Laying Vessel Market Size, by Power Transmission and Distribution, by Country, 2017-2032 (USD Thousand)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

12.5. Defense and Security Networks

Table 88. Global Cable Laying Vessel Market Size, by Defense and Security Networks, by Region, 2017-2032 (USD Thousand)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 89. Global Cable Laying Vessel Market Size, by Defense and Security Networks, by Group, 2017-2032 (USD Thousand)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 90. Global Cable Laying Vessel Market Size, by Defense and Security Networks, by Country, 2017-2032 (USD Thousand)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

12.6. Scientific and Environmental Monitoring

Table 91. Global Cable Laying Vessel Market Size, by Scientific and Environmental Monitoring, by Region, 2017-2032 (USD Thousand)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 92. Global Cable Laying Vessel Market Size, by Scientific and Environmental Monitoring, by Group, 2017-2032 (USD Thousand)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 93. Global Cable Laying Vessel Market Size, by Scientific and Environmental Monitoring, by Country, 2017-2032 (USD Thousand)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

12.7. Industrial Infrastructure

Table 94. Global Cable Laying Vessel Market Size, by Industrial Infrastructure, by Region, 2017-2032 (USD Thousand)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 95. Global Cable Laying Vessel Market Size, by Industrial Infrastructure, by Group, 2017-2032 (USD Thousand)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 96. Global Cable Laying Vessel Market Size, by Industrial Infrastructure, by Country, 2017-2032 (USD Thousand)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

13. Cable Laying Vessel Market, by Vessel Buyer

Vessel suppliers should distinguish the organization commissioning the asset from its financier, operator, and downstream infrastructure customer. Integrated Cable-System Suppliers acquire marine capability to support cable-system delivery. ■■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■ ■■■■■■■■■■ ■■ ■■ ■■■ ■■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■ ■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■ ■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■ ■■■■■■ ■■■■ ■■ ■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■ ■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■ ■■■■ ■■■■■■■■ ■■ ■ ■■■■■■■■ ■■■■■■■■■■■■■■■ ■■■■■■■■■■

Marine Installation and Maintenance Contractors face a different commitment question: whether expected assignments justify an owned asset. ■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■ ■■ ■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■ ■■■■■■■■■■ ■■■■ ■■■■ ■■■■■■■■ ■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■ ■ ■■■■■■■■■■■■■ ■■■■■ ■■■■■ ■■■■ ■■■■■■ ■■■■■■■■ ■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■ ■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■ That U.S. example supports distinguishing committed employment from project discussions, not a global conclusion about contractor investment.

■■■■■■ ■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■ ■■■■■■■■■ ■■■■ ■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■ ■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■ ■■■ ■■■■■■■ ■■■ ■■■■■■■■ ■■■ ■■■■■■■■■ ■■ ■■■■■■■ ■■■■■■■■ ■■■■ ■■■ ■■■■■■■■■■■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■■ Such arrangements require builders and lessors to identify the construction-contract party and operator's acceptance authority separately. Leasing can separate asset funding from operation, but it does not establish the shipyard-contract signatory or remove dependence on an employable configuration.

Captive Infrastructure and Public-Service Operators prioritize continuity of their own infrastructure or public mission. December 2025 congressional explanatory material requested a Navy procurement strategy for replacing USNS Zeus, including organic capability and interim service arrangements. ■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■ ■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■ ■■■■■■■■■ ■■■■■■ ■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■■■■■■■ ■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■ ■■■■■■■■■ ■ ■■■■■■■■■ ■■■■■■■■ ■■ ■ ■■■■■■ ■■■■■■

Figure 24. Global Cable Laying Vessel Market Size, by Vessel Buyer, 2025 vs 2032 (%)

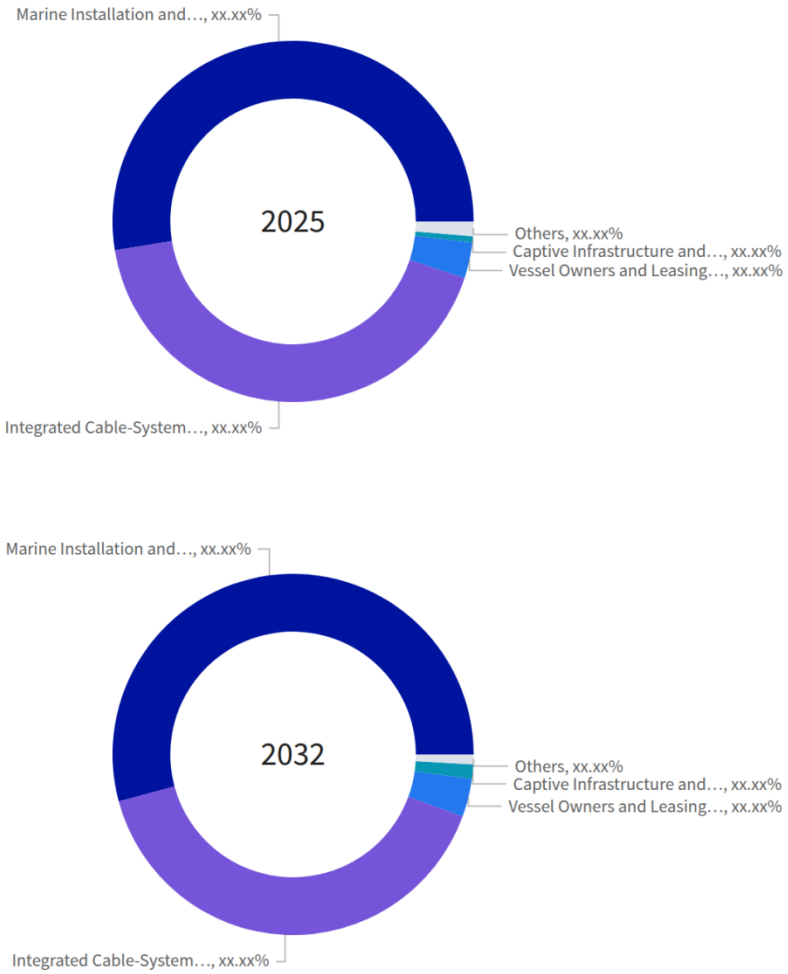

Figure 25. Global Cable Laying Vessel Market, by Vessel Buyer: Market size by category, 2025

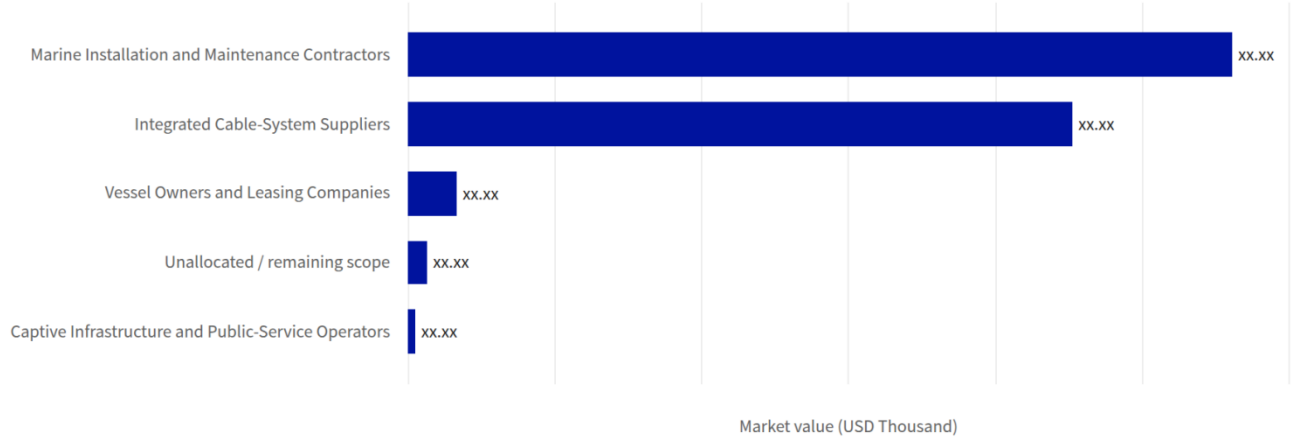

Figure 26. Global Cable Laying Vessel Market, by Vessel Buyer: Market size and growth, 2025-2032

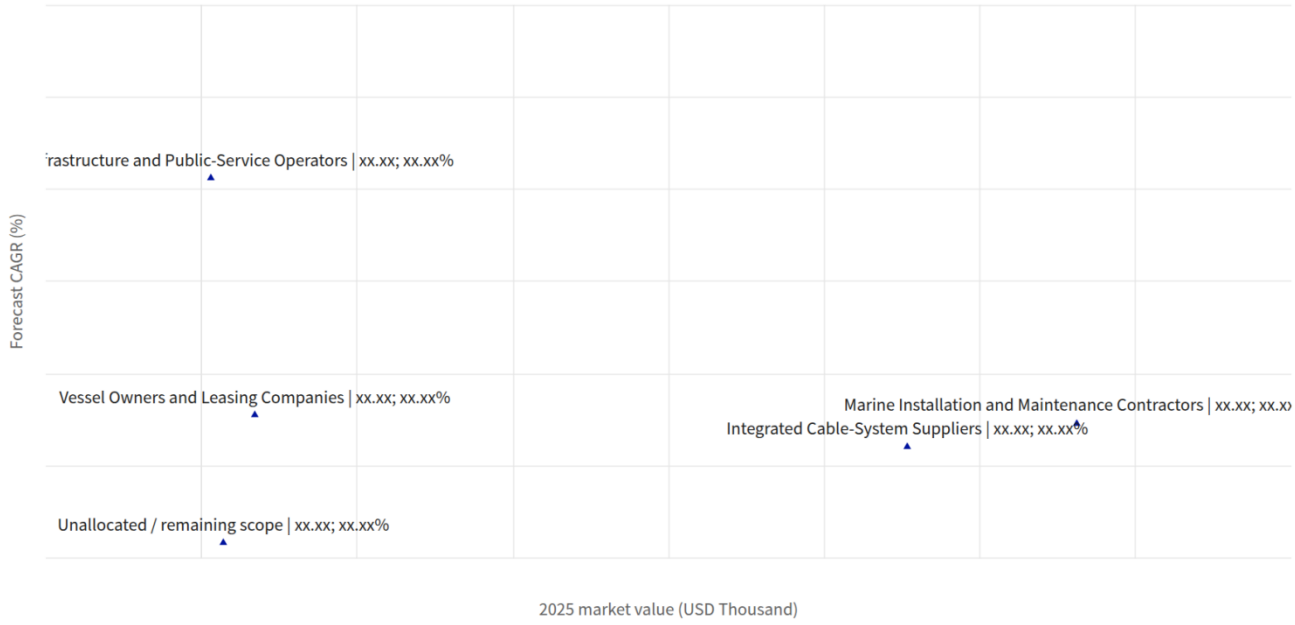

Table 97. Global Cable Laying Vessel Market, by Vessel Buyer growth contribution, 2025-2032

Category	2025 value (USD Thousand)	2032 value (USD Thousand)	Added value (USD Thousand)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Captive Infrastructure and Public-Service Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Cable-System Suppliers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Marine Installation and Maintenance Contractors	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unallocated / remaining scope	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Vessel Owners and Leasing Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 98. Global Cable Laying Vessel Market Size, by Vessel Buyer, 2017-2032 (USD Thousand)

Vessel Buyer	2023	2024	2025	2026	2027	2032	CAGR (%)
Captive Infrastructure and Public-Service Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Cable-System Suppliers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Marine Installation and Maintenance Contractors	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Vessel Owners and Leasing Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Commercial Shipbuilding: Selected Offshore Wind Projects Used a Mix of U.S. and Foreign Vessels, Spurring Some Shipbuilding Investments
   - GAO's March xx.xx 2026 report records, from discussions with Kalypso representatives, that prospective project negotiations ended and the company was no longer proceeding with its planned cable-vessel construction as of December 2025. This is a specific U.S. example, not a global investment pattern.
2. NTT Communications, NTTWEM and NTT FINANCE Launch New Submarine Cable-Laying Ship Kizuna
   - The November xx.xx 2016 Kizuna announcement assigns planned ownership to NTT FINANCE and leasing and operation to NTTWEM, with use by its telecommunications parent and external customers; it does not identify the shipyard-contract signatory.

3. Nexans Electra
   · Ulstein identifies Nexans Marine Operations AS as the ordering, owning, and operating entity for Nexans Electra, providing a transaction-specific distinction between corporate affiliation and disclosed asset roles.
4. Notice Regarding Joint Ownership of Large Work Vessels for Offshore Wind Construction
   · Penta-Ocean's January xx.xx 2025 announcement states that it concluded the PaxOcean cable-vessel shipbuilding contract and separately arranged future joint ownership and construction, management, and charter responsibilities with Fuyo General Lease.
5. Congressional Record - House, December 10, 2025: Report on Procurement Strategy for Submarine Cable Laying and Repair Ships
   · December xx.xx 2025 congressional explanatory material requests a Navy replacement-vessel procurement strategy addressing organic capability, procurement timing, and interim cable services. It is a strategy request, not evidence of a completed construction award.
6. NKT Eleonora: The new cable-laying vessel capable of running on methanol
   · NKT describes designing Eleonora's laying system around NKT power-cable parameters and connecting cable manufacturing expertise with installation requirements.

13.1. Marine Installation and Maintenance Contractors

Table 99. Global Cable Laying Vessel Market Size, by Marine Installation and Maintenance Contractors, by Region, 2017-2032 (USD Thousand)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 100. Global Cable Laying Vessel Market Size, by Marine Installation and Maintenance Contractors, by Group, 2017-2032 (USD Thousand)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 101. Global Cable Laying Vessel Market Size, by Marine Installation and Maintenance Contractors, by Country, 2017-2032 (USD Thousand)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

13.2. Integrated Cable-System Suppliers

Table 102. Global Cable Laying Vessel Market Size, by Integrated Cable-System Suppliers, by Region, 2017-2032 (USD Thousand)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 103. Global Cable Laying Vessel Market Size, by Integrated Cable-System Suppliers, by Group, 2017-2032 (USD Thousand)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 104. Global Cable Laying Vessel Market Size, by Integrated Cable-System Suppliers, by Country, 2017-2032 (USD Thousand)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

13.3. Vessel Owners and Leasing Companies

Table 105. Global Cable Laying Vessel Market Size, by Vessel Owners and Leasing Companies, by Region, 2017-2032 (USD Thousand)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 106. Global Cable Laying Vessel Market Size, by Vessel Owners and Leasing Companies, by Group, 2017-2032 (USD Thousand)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 107. Global Cable Laying Vessel Market Size, by Vessel Owners and Leasing Companies, by Country, 2017-2032 (USD Thousand)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

13.4. Captive Infrastructure and Public-Service Operators

Table 108. Global Cable Laying Vessel Market Size, by Captive Infrastructure and Public-Service Operators, by Region, 2017-2032 (USD Thousand)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 109. Global Cable Laying Vessel Market Size, by Captive Infrastructure and Public-Service Operators, by Group, 2017-2032 (USD Thousand)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 110. Global Cable Laying Vessel Market Size, by Captive Infrastructure and Public-Service Operators, by Country, 2017-2032 (USD Thousand)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

14. Cable Laying Vessel Market, by Construction Pathway

Newbuilds and Conversions offer different starting points for meeting a cable mission, rather than interchangeable delivery packages. ■■■■■■■■■ ■■■■■ ■■■ ■■■■■ ■■ ■■■■■■■■■■ ■ ■■■■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■ ■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■ ■■■ ■■■ ■■■■■ ■■■■■■■■ ■■ ■■■■■ ■■■■■■■■■■■■■■ ■■■■■ ■■ ■■■■■■■■■■■■ The distinction matters commercially: handover establishes an asset milestone, but does not by itself establish completed commissioning or successful project employment.

■■■■■■■■■■■■ ■■■■■■ ■■ ■■■■■■■■ ■■■■■■■■ ■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■ ■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■■■■■■■ ■■ ■ ■■■■■■■■ ■■■■■■■ ■■■■ ■ ■■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■ ■■ ■■■■■■■■ ■■■■■ ■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■■■■■■■ ■■■■■■■■ ■■■■ ■■ ■ ■■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■■■ Its suitability nevertheless depends on the inherited asset. DNV identifies the combination of existing and new structures, potentially limited original documentation, and coordination between class, yard, and designer as conversion concerns.

An owner should favor conversion only when the existing-vessel record and proposed modifications support an agreed acceptance scope. ■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■ ■■ ■■■■■■■■■ ■ ■■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■ ■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■ ■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■ ■ ■■■■■■■■■ ■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■ ■ ■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■ The decision triggers are documented asset condition, an agreed configuration, and a credible approval schedule-not an assumption that conversion is automatically faster or that a launched newbuild is ready for employment.

Figure 27. Global Cable Laying Vessel Market, by Construction Pathway: Market share evolution, 2025-2032

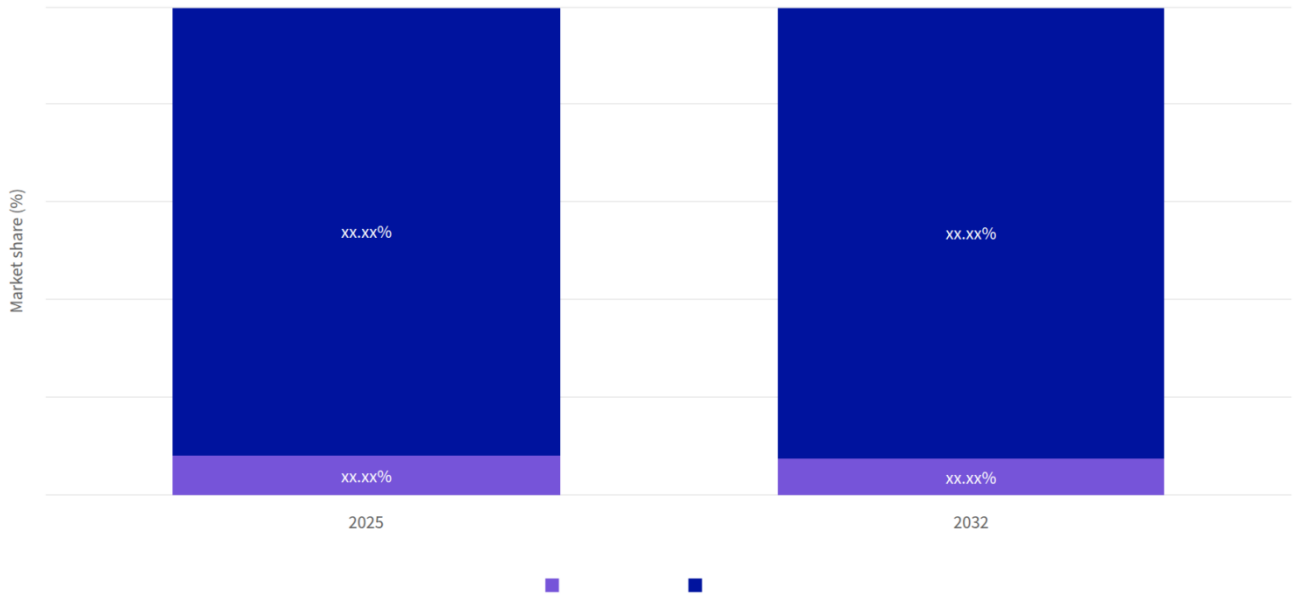

Figure 28. Global Cable Laying Vessel Market Size, by Construction Pathway, 2025 vs 2026 vs 2032

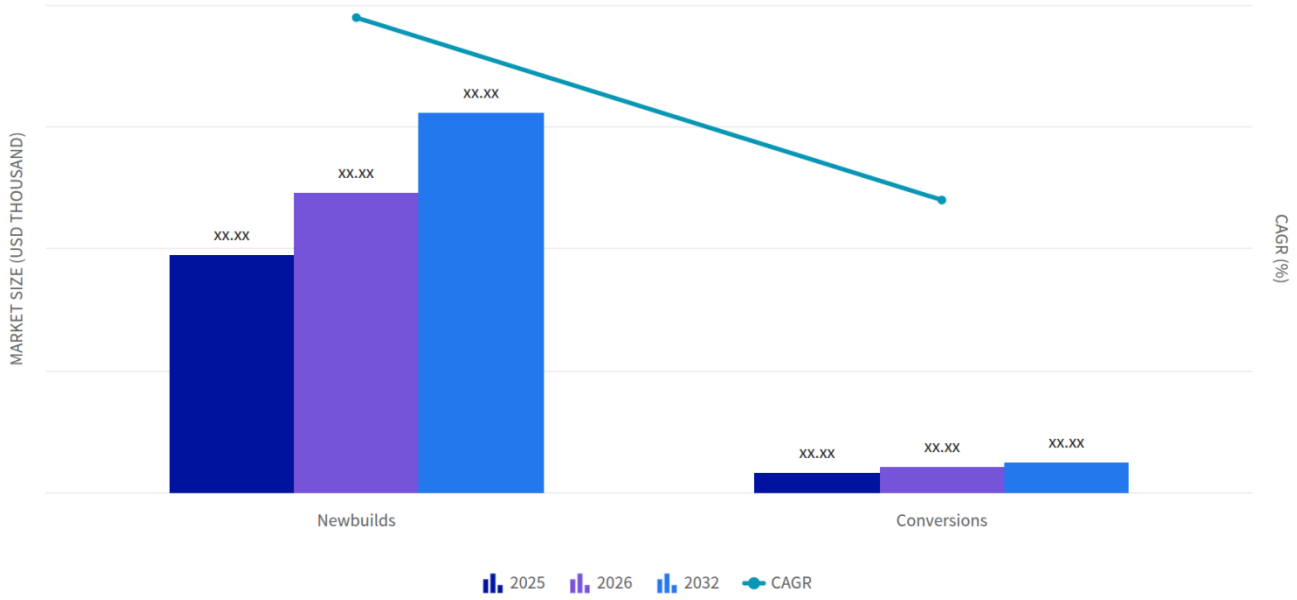

Table 111. Global Cable Laying Vessel Market, by Construction Pathway growth contribution, 2025-2032

Category	2025 value (USD Thousand)	2032 value (USD Thousand)	Added value (USD Thousand)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Conversions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Newbuilds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 112. Global Cable Laying Vessel Market Size, by Construction Pathway, 2017-2032 (USD Thousand)

Construction Pathway	2023	2024	2025	2026	2027	2032	CAGR (%)
Conversions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Newbuilds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Conversion
   - DNV identifies existing and new structural interfaces, potentially limited original documentation, coordination between class, yard, and designer, and an agreed approval schedule as conversion concerns. Pathway-selection implications are analytical.
2. IT Infinity - From PSV to State-of-the-Art Cable-Laying Vessel
   - VARD records IT Infinity's delivery in December 2024 after conversion from a platform supply vessel, describing structural, electrical, and cable-equipment changes and an operational resulting vessel.
3. Official handover of CLV Nexans Electra
   - Nexans reports Electra's flag change and operational handover completed on May xx.xx 2026, followed by final commissioning ahead of upcoming deployment. The release supports distinguishing handover from completed mission readiness.

14.1. Newbuilds

Table 113. Global Cable Laying Vessel Market Size, by Newbuilds, by Region, 2017-2032 (USD Thousand)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 114. Global Cable Laying Vessel Market Size, by Newbuilds, by Group, 2017-2032 (USD Thousand)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 115. Global Cable Laying Vessel Market Size, by Newbuilds, by Country, 2017-2032 (USD Thousand)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

14.2. Conversions

Table 116. Global Cable Laying Vessel Market Size, by Conversions, by Region, 2017-2032 (USD Thousand)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 117. Global Cable Laying Vessel Market Size, by Conversions, by Group, 2017-2032 (USD Thousand)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 118. Global Cable Laying Vessel Market Size, by Conversions, by Country, 2017-2032 (USD Thousand)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

15. Cable Laying Vessel Market, by Operating Envelope

[illegible] A nearshore assignment therefore does not make the vessel restricted-seagoing. Owners expecting employment across different sea areas should evaluate unrestricted approval separately from draft, positioning, and cable-handling requirements.

Restricted Seagoing permissions require closer alignment between expected employment and the actual restriction. [illegible] The trade-off is less redeployment flexibility, and the prerequisite is vessel-specific confirmation of the applicable class and administration restrictions.

[illegible] Generic notation directories explain classification language; they do not establish a particular cable vessel's approval. Certificates and administration conditions are consequently necessary before assigning an individual asset to a restricted or sheltered category or relying on it for the intended employment.

Figure 29. Global Cable Laying Vessel Market, by Operating Envelope: Market share evolution, 2025-2032

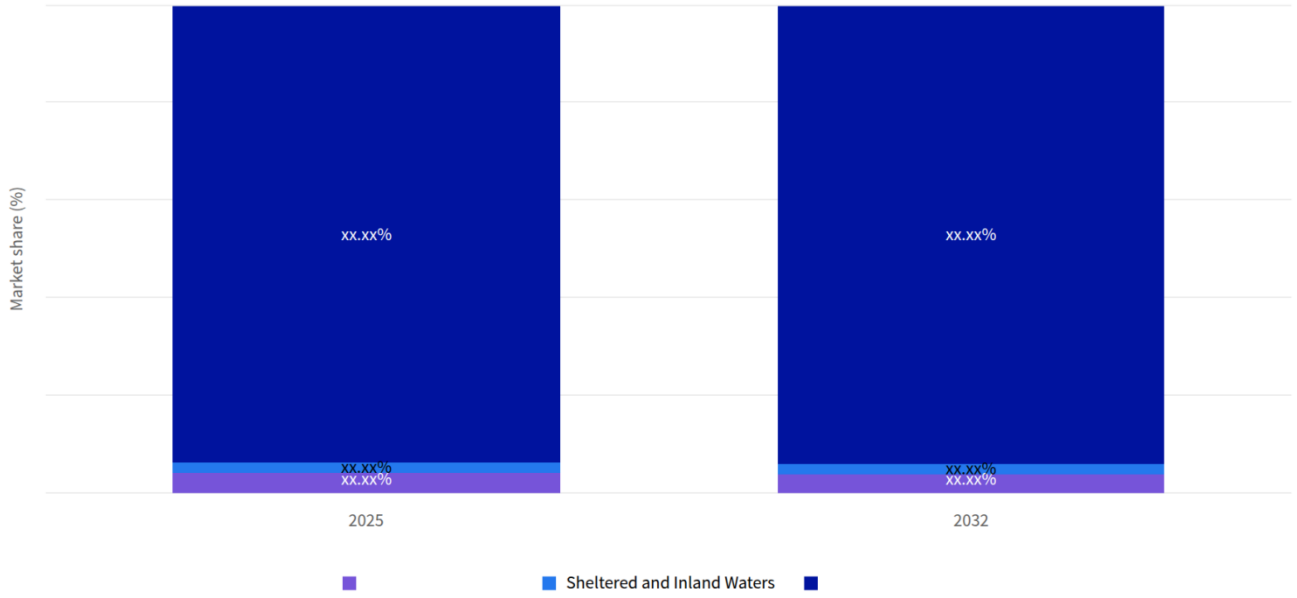

Figure 30. Global Cable Laying Vessel Market, by Operating Envelope: Market size by category, 2025

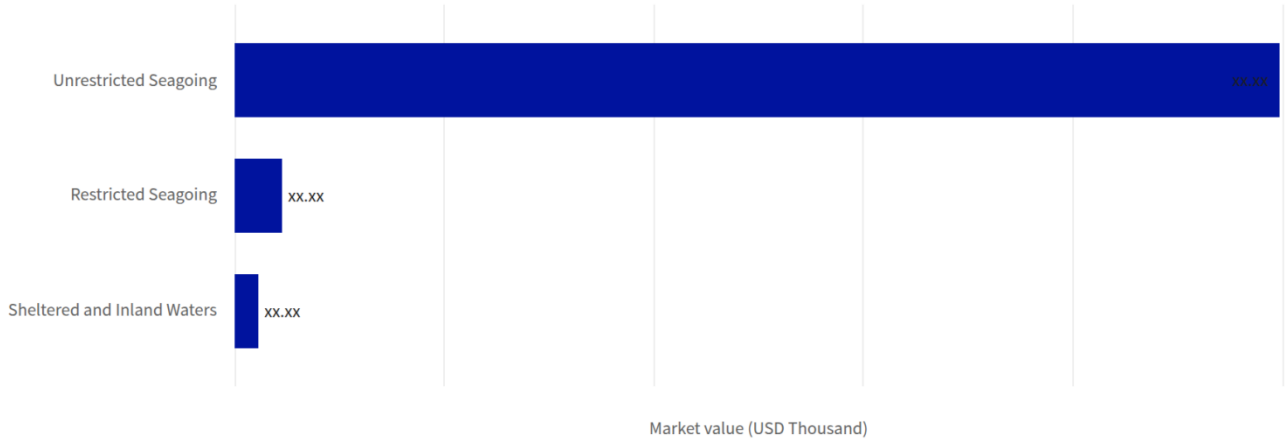

Figure 31. Global Cable Laying Vessel Market, by Operating Envelope: Market size and growth, 2025-2032

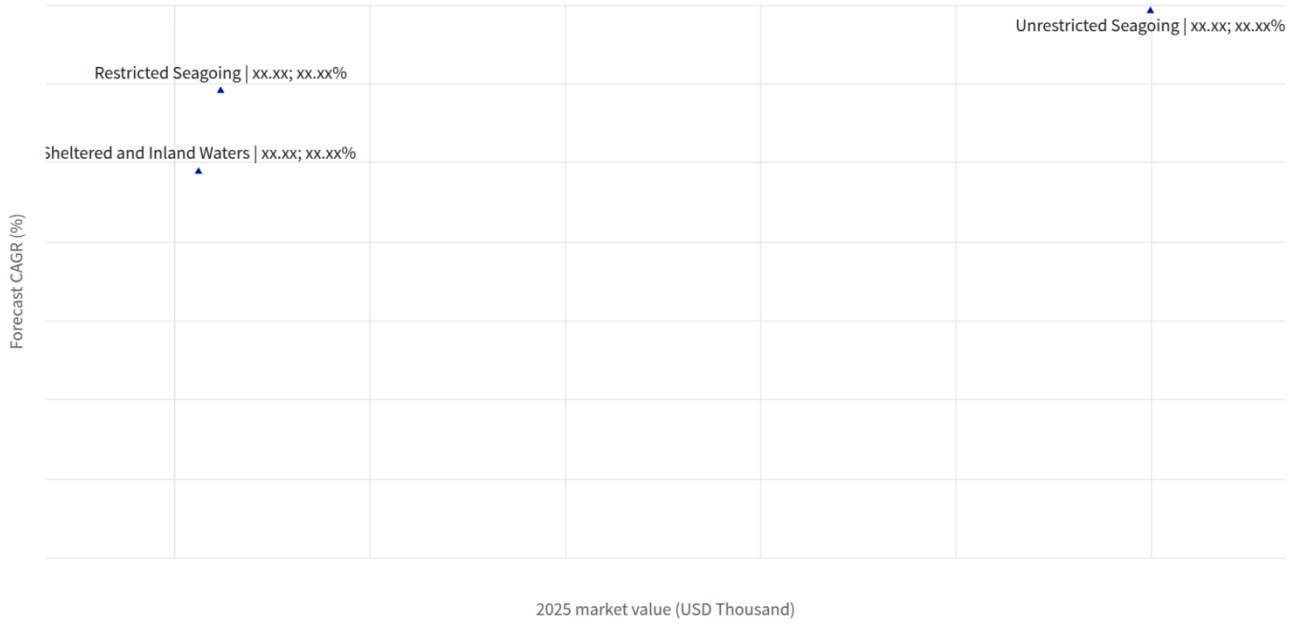

Table 119. Global Cable Laying Vessel Market, by Operating Envelope growth contribution, 2025-2032

Category	2025 value (USD Thousand)	2032 value (USD Thousand)	Added value (USD Thousand)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Restricted Seagoing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sheltered and Inland Waters	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unrestricted Seagoing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 120. Global Cable Laying Vessel Market Size, by Operating Envelope, 2017-2032 (USD Thousand)

Operating Envelope	2023	2024	2025	2026	2027	2032	CAGR (%)
Restricted Seagoing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sheltered and Inland Waters	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unrestricted Seagoing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. NR600: Hull Structure and Arrangement for the Classification of Cargo Ships Less Than 65 m and Non-Cargo Ships Less Than 90 m-October 2024

   · The October 2024 Bureau Veritas rules distinguish unrestricted, summer-zone, tropical-zone, coastal-area, and sheltered-area navigation notations. These support terminology differentiation, not approval of individual cable vessels.

2. ClassNK Classification Register-Notation Help
   · ClassNK's register help distinguishes coasting, limited, harbor, smooth-water, river, estuarial, and inland-water service notations. The directory does not establish a particular cable vessel's permission.
3. CMOS Installer
   · Enshore describes CMOS Installer as a shallow-draft cable vessel supporting shallow-water projects and publishes an unrestricted-navigation class notation. This directly challenges inference of restricted approval from nearshore employment.

15.1. Unrestricted Seagoing

Table 121. Global Cable Laying Vessel Market Size, by Unrestricted Seagoing, by Region, 2017-2032 (USD Thousand)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 122. Global Cable Laying Vessel Market Size, by Unrestricted Seagoing, by Group, 2017-2032 (USD Thousand)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 123. Global Cable Laying Vessel Market Size, by Unrestricted Seagoing, by Country, 2017-2032 (USD Thousand)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

15.2. Restricted Seagoing

Table 124. Global Cable Laying Vessel Market Size, by Restricted Seagoing, by Region, 2017-2032 (USD Thousand)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 125. Global Cable Laying Vessel Market Size, by Restricted Seagoing, by Group, 2017-2032 (USD Thousand)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 126. Global Cable Laying Vessel Market Size, by Restricted Seagoing, by Country, 2017-2032 (USD Thousand)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

15.3. Sheltered and Inland Waters

Table 127. Global Cable Laying Vessel Market Size, by Sheltered and Inland Waters, by Region, 2017-2032 (USD Thousand)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 128. Global Cable Laying Vessel Market Size, by Sheltered and Inland Waters, by Group, 2017-2032 (USD Thousand)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 129. Global Cable Laying Vessel Market Size, by Sheltered and Inland Waters, by Country, 2017-2032 (USD Thousand)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

16. Cable Laying Vessel Market, by Procurement Structure

[redacted] A single-prime structure can consolidate specified responsibilities, making it relevant to buyers without a substantial internal integration organization. Its usefulness depends on whether the contract actually covers platform and mission-equipment interfaces, integrated acceptance, and defect resolution; a turnkey label does not establish every obligation.

Buyer-Managed Package Delivery preserves greater owner involvement in mission-equipment selection and coordination. [redacted] These examples establish split-package participation, but their public descriptions do not settle the complete allocation of integration liability or final acceptance authority.

[redacted] Before award, buyers and bidders should identify who resolves cross-package defects, authorizes changes, and accepts the integrated vessel. An unnamed responsibility at those interfaces is a commitment risk under either structure.

Figure 32. Global Cable Laying Vessel Market, by Procurement Structure: Market share evolution, 2025-2032

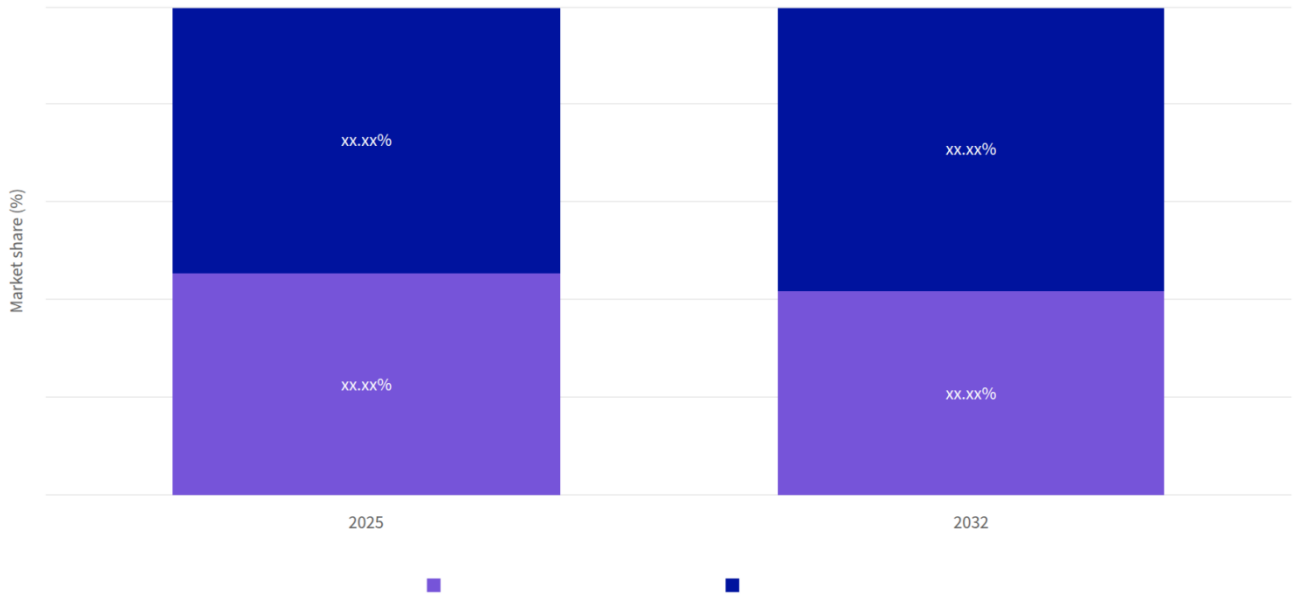

Figure 33. Global Cable Laying Vessel Market, by Procurement Structure: Market size by category, 2025

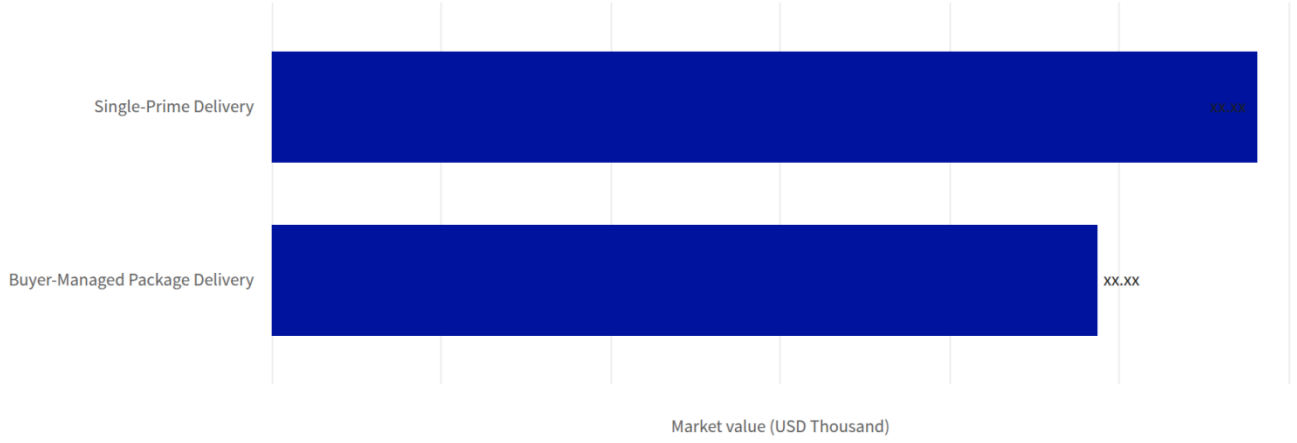

Table 130. Global Cable Laying Vessel Market, by Procurement Structure growth contribution, 2025-2032

Category	2025 value (USD Thousand)	2032 value (USD Thousand)	Added value (USD Thousand)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Buyer-Managed Package Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Prime Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 131. Global Cable Laying Vessel Market Size, by Procurement Structure, 2017-2032 (USD Thousand)

Procurement Structure	2023	2024	2025	2026	2027	2032	CAGR (%)
Buyer-Managed Package Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Prime Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Interview with Dario Brivio
   - Prysmian describes Leonardo da Vinci as using a VARD naval platform with Prysmian responsible for cable-laying equipment. This supports retained owner equipment responsibility without establishing the complete integration-liability allocation.
2. Ship Conversion Project for Cable Laying Barge
   - V.Group's completed barge-conversion case describes assistance with owner-supplied equipment procurement, design approvals, and supervised shipyard execution. It does not expressly settle overall integration liability or final acceptance authority.
3. Ulstein Verft leverer kabelleggingsfartøyet Nexans Electra
   - Ulstein's May xx.xx 2026 Norwegian release states that the yard was responsible for Nexans Electra's total delivery, including outfitting and completion. Contractual transfer of additional obligations remains an analytical condition, not a disclosed contract term.

16.1. Single-Prime Delivery

Table 132. Global Cable Laying Vessel Market Size, by Single-Prime Delivery, by Region, 2017-2032 (USD Thousand)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 133. Global Cable Laying Vessel Market Size, by Single-Prime Delivery, by Group, 2017-2032 (USD Thousand)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 134. Global Cable Laying Vessel Market Size, by Single-Prime Delivery, by Country, 2017-2032 (USD Thousand)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

16.2. Buyer-Managed Package Delivery

Table 135. Global Cable Laying Vessel Market Size, by Buyer-Managed Package Delivery, by Region, 2017-2032 (USD Thousand)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 136. Global Cable Laying Vessel Market Size, by Buyer-Managed Package Delivery, by Group, 2017-2032 (USD Thousand)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 137. Global Cable Laying Vessel Market Size, by Buyer-Managed Package Delivery, by Country, 2017-2032 (USD Thousand)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

17. Cable Laying Vessel Market, by Cable Payload Capacity

Cable Payload Capacity should be compared through the cable load permitted in the relevant vessel configuration, not through deadweight or the sum of individual storage maxima. ■■■■■■■■■■ ■■■■■ ■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■ ■ ■■■■■■■■■■■■■ ■■■■■■■■■■■■■■ ■■■■■■ ■■■■■■■■■ ■■■■ ■■■■■■■■ ■■■■ ■■■■■ ■■■ ■ ■■■■■■■■■■■■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■ The Low, Medium, High, and Ultra-High Cable Payload categories are analytical capacity lenses, not substitutes for those acceptance conditions.

Low Cable Payload can suit a mission whose required onboard inventory is limited; Ulstein's fiber-maintenance offering illustrates a lower-capacity design role. Medium Cable Payload offers include power-export and inter-array designs, while V.Group's completed barge conversion demonstrates a cable-storage arrangement on a reused platform. ■■■■■■■■ ■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■■ ■■ ■■■■■■■■ ■■■■■■■■■■■ ■■ ■■■■■■■■ ■■■■■■■ ■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■ ■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■ ■■■■ ■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■ ■■■■■■ ■■■■■■■■ ■ ■■■■■■ ■■■■ ■■ ■■ ■■■■■■■■■■■ ■■■■ ■■■■■■■■■ ■■■■■■■■■■■■■■■

■■■■ ■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■ ■■■■■■■■ ■■■■■■■■ ■ ■■■■■■■■■ ■■■■■■■■■■ ■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■ ■■■■■■■■■■■■■■ ■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■ ■■■■■■■■■ ■■■ ■■■ ■■■■■■■■ ■■■■ ■■■■■ ■■■■■■■■■■■■■■ ■■■ ■■■■ ■■■■■■■■■■■ NKT links Eleonora's larger storage arrangement to longer cable lengths and customer-specific power-cable requirements; its first-half 2026 announcement retained a 2027 operational target. That prospective capability should not be treated as an accepted asset available for immediate employment.

A higher tier is defensible when the buyer's documented cable inventory and employment requirements need it and the receiving infrastructure can accommodate the proposed vessel. Otherwise, additional carrying capability may not address the purchase requirement. ■■■■■ ■■■■■■■■■ ■■■■■■ ■■■■ ■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■ ■■■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■■■

Figure 34. Global Cable Laying Vessel Market, by Cable Payload Capacity: Market share evolution, 2025-2032

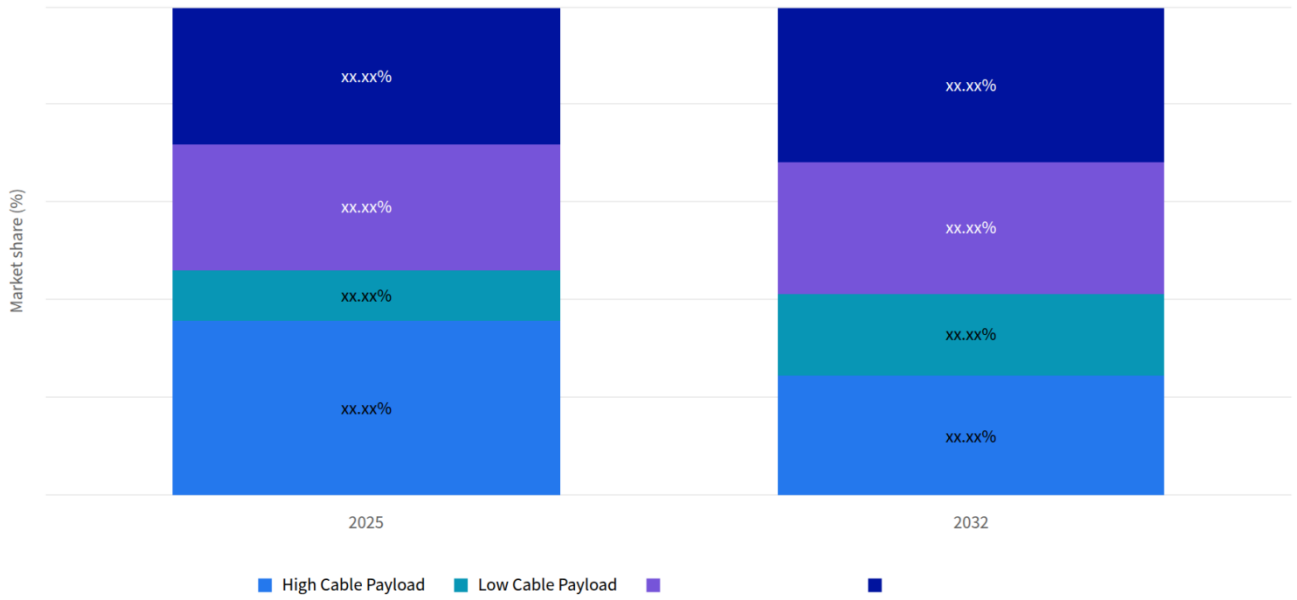

Figure 35. Global Cable Laying Vessel Market, by Cable Payload Capacity: Market size by category, 2025

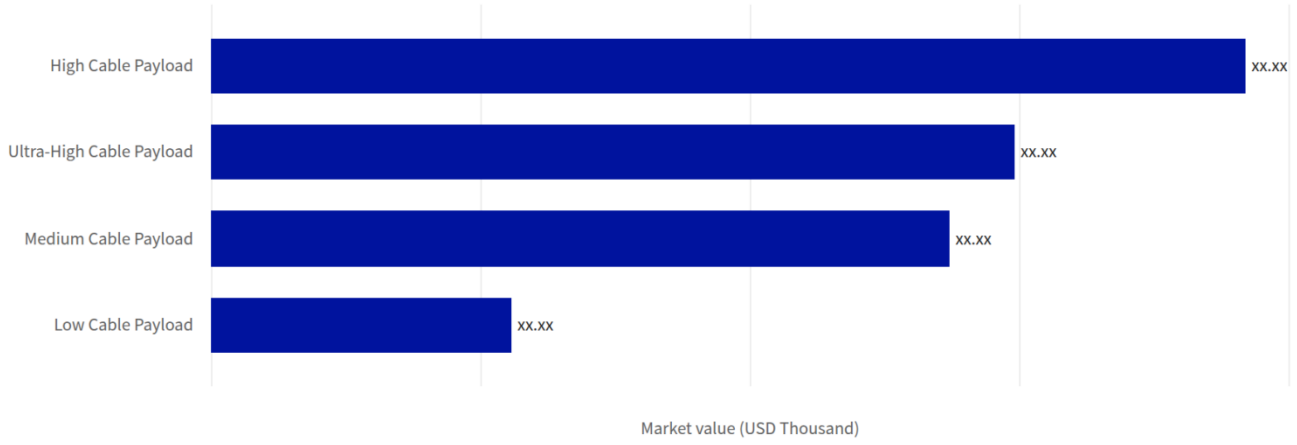

Figure 36. Global Cable Laying Vessel Market, by Cable Payload Capacity: Market size and growth, 2025-2032

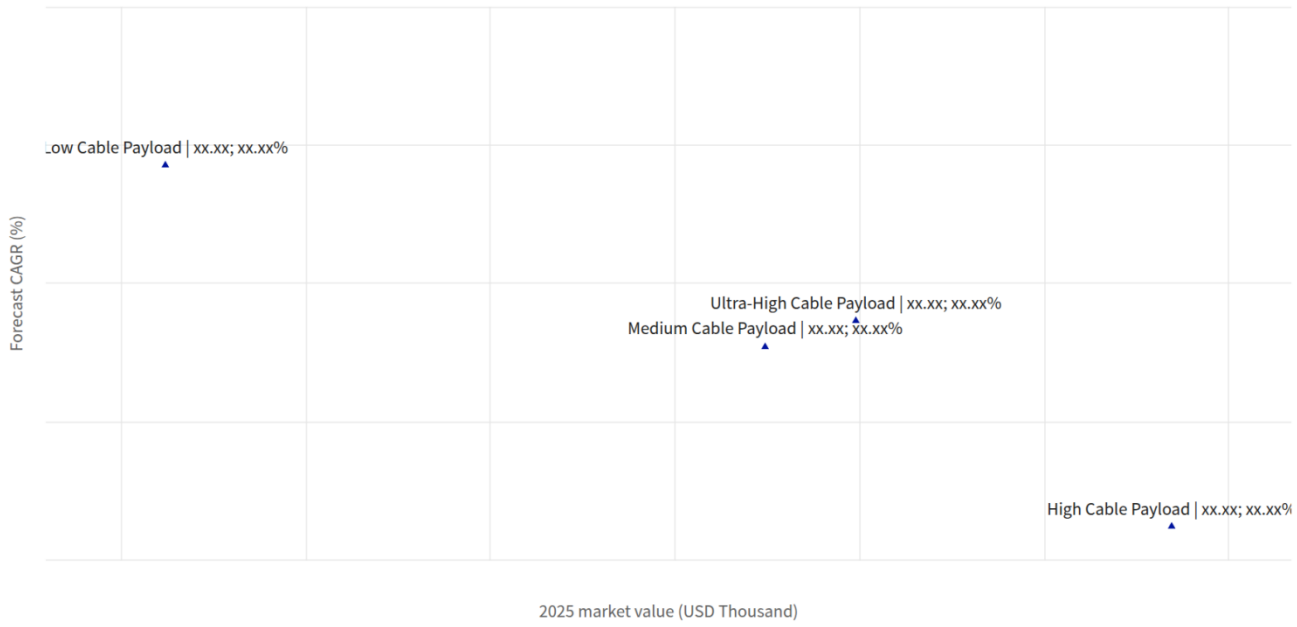

Table 138. Global Cable Laying Vessel Market, by Cable Payload Capacity growth contribution, 2025-2032

Category	2025 value (USD Thousand)	2032 value (USD Thousand)	Added value (USD Thousand)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
High Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Medium Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-High Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 139. Global Cable Laying Vessel Market Size, by Cable Payload Capacity, 2017-2032 (USD Thousand)

Cable Payload Capacity	2023	2024	2025	2026	2027	2032	CAGR (%)
High Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Medium Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-High Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Ship Conversion Project for Cable Laying Barge
   - The delivered conversion included a cable carousel on an existing barge. Its storage specification is not a documented whole-vessel simultaneous aggregate payload limit.

2. NKT Eleonora: The new cable-laying vessel capable of running on methanol
   · NKT presents Eleonora's larger cable-storage arrangement as planned capability for longer lengths and customer-specific power-cable requirements; the page does not establish final accepted delivery.
3. Cable lay and repair
   · Ulstein's design portfolio separately presents cable capacity and deadweight and includes fiber-maintenance, power-inter-array, and progressively larger power-export offerings. These are offered designs, not proof of delivery of every configuration.
4. Monna Lisa-DP3 Cable Laying Vessel: Technical Specifications
   · Monna Lisa's specification lists individual carousel capacities separately from its combined-load qualification and vessel deadweight. This supports comparison through an explicit aggregate loading boundary rather than automatic summation.
5. NKT A/S 1. halvår 2026: Solid finansiel og operationel eksekvering
   · NKT's first-half 2026 announcement states that Eleonora was expected to become operational in 2027. This supports treating its capability as prospective rather than establishing accepted immediate availability.

17.1. High Cable Payload

Table 140. Global Cable Laying Vessel Market Size, by High Cable Payload, by Region, 2017-2032 (USD Thousand)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 141. Global Cable Laying Vessel Market Size, by High Cable Payload, by Group, 2017-2032 (USD Thousand)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 142. Global Cable Laying Vessel Market Size, by High Cable Payload, by Country, 2017-2032 (USD Thousand)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

17.2. Ultra-High Cable Payload

Table 143. Global Cable Laying Vessel Market Size, by Ultra-High Cable Payload, by Region, 2017-2032 (USD Thousand)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 144. Global Cable Laying Vessel Market Size, by Ultra-High Cable Payload, by Group, 2017-2032 (USD Thousand)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 145. Global Cable Laying Vessel Market Size, by Ultra-High Cable Payload, by Country, 2017-2032 (USD Thousand)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

17.3. Medium Cable Payload

Table 146. Global Cable Laying Vessel Market Size, by Medium Cable Payload, by Region, 2017-2032 (USD Thousand)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 147. Global Cable Laying Vessel Market Size, by Medium Cable Payload, by Group, 2017-2032 (USD Thousand)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 148. Global Cable Laying Vessel Market Size, by Medium Cable Payload, by Country, 2017-2032 (USD Thousand)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

17.4. Low Cable Payload

Table 149. Global Cable Laying Vessel Market Size, by Low Cable Payload, by Region, 2017-2032 (USD Thousand)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 150. Global Cable Laying Vessel Market Size, by Low Cable Payload, by Group, 2017-2032 (USD Thousand)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 151. Global Cable Laying Vessel Market Size, by Low Cable Payload, by Country, 2017-2032 (USD Thousand)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

18. Cable Laying Vessel Market, by Cable-Laying Depth Capability

Cable-Laying Depth Capability concerns the water depth applicable to the cable-laying mission, not a crane's subsea rating, a vehicle's operating depth, or burial depth below the seabed. ■■■■■■■■■■■■■ ■■■■■■■■■■ ■■■ ■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■ ■ ■■■■■■■■■■■■ ■■■■ ■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■ ■■■■■■■■■■■■ ■■ ■■■■■ ■■■■■■ ■■ ■■ ■■ ■■■■■■■■ A buyer serving that duty should examine the accepted mission configuration rather than require a deeper capability solely because a larger vessel is offered.

Intermediate-Depth Capability and Deepwater Capability require cable-specific comparison. Prysmian's Giulio Verne description states power-cable laying up to xx.xx meters, while its Monna Lisa specification states power-cable laying up to xx.xx meters and describes burial equipment separately. ■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■ ■■■■■■■■■■ ■■ ■■■■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■ ■■■■■■■■■ ■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■ ■ ■■■■■ ■■■■■■■■■ ■■■■■■■

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■■■■■ ■■■■■ ■■■■■■■ ■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■■■ ■■■ ■■■■■ ■■■■ ■■■■■■■■ ■■■■■■ ■■■■■■■■■■ ■■ ■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■ A verified wider envelope can support additional prospective assignments, but only when cable compatibility, employment, and the offered configuration also match. The acquisition trigger is a documented route requirement that the proposed vessel can contractually meet; neither a historical assignment nor an unrelated equipment rating closes that requirement.

Figure 37. Global Cable Laying Vessel Market, by Cable-Laying Depth Capability: Market share evolution, 2025-2032

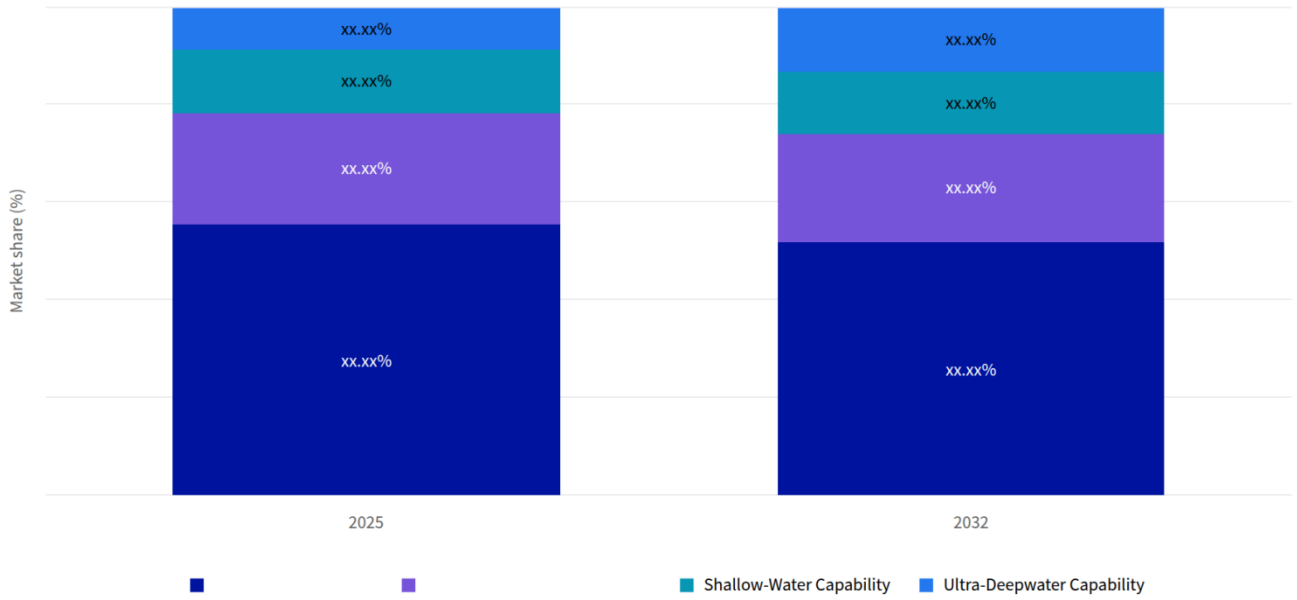

Figure 38. Global Cable Laying Vessel Market, by Cable-Laying Depth Capability: Market size by category, 2025

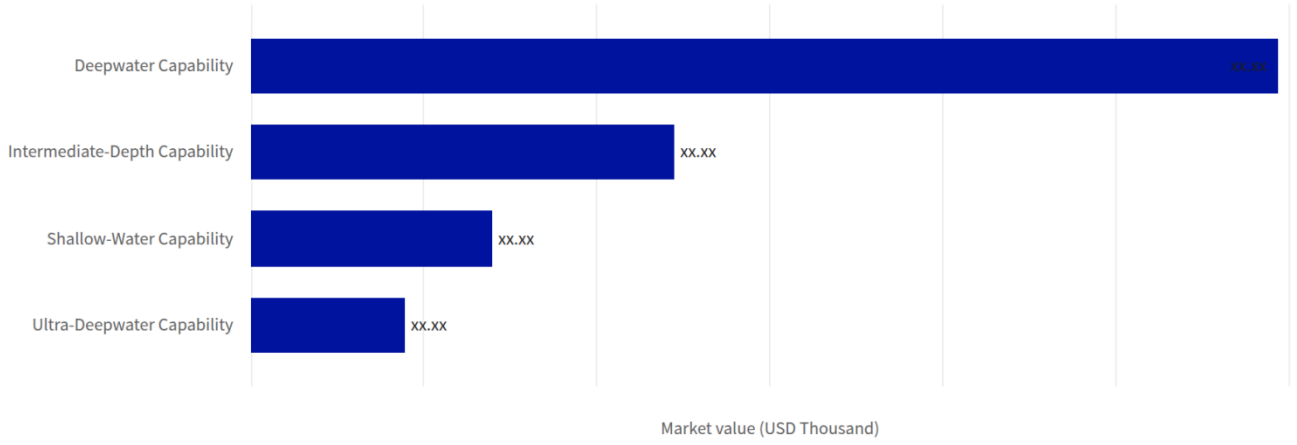

Figure 39. Global Cable Laying Vessel Market, by Cable-Laying Depth Capability: Market size and growth, 2025-2032

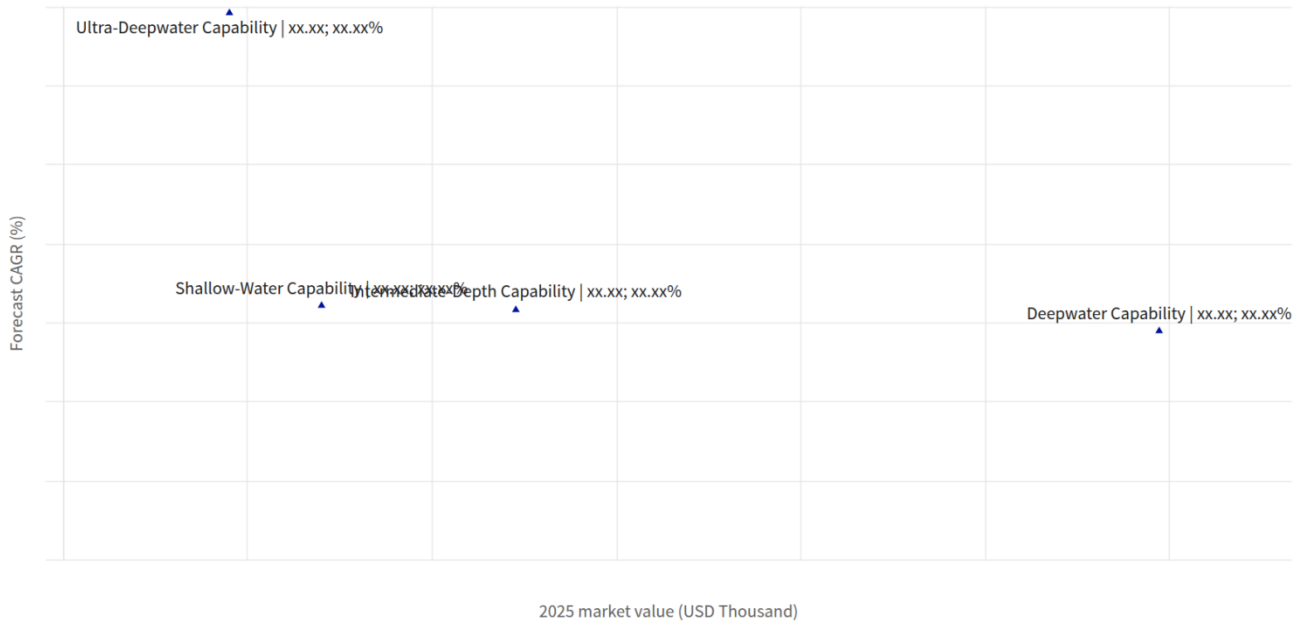

Table 152. Global Cable Laying Vessel Market, by Cable-Laying Depth Capability growth contribution, 2025-2032

Category	2025 value (USD Thousand)	2032 value (USD Thousand)	Added value (USD Thousand)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Deepwater Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intermediate-Depth Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Shallow-Water Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-Deepwater Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 153. Global Cable Laying Vessel Market Size, by Cable-Laying Depth Capability, 2017-2032 (USD Thousand)

Cable-Laying Depth Capability	2023	2024	2025	2026	2027	2032	CAGR (%)
Deepwater Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intermediate-Depth Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Shallow-Water Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-Deepwater Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Monna Lisa-DP3 Cable Laying Vessel: Technical Specifications
   - The specification states power-cable laying capability up to xx.xx meters of water depth and describes burial equipment separately. It is a published capability description, not a delivery-linked maximum-capability certificate.
2. Boka Ocean-Project Description
   - Remontowa Marine Design & Consulting describes Boka Ocean's conversion from a pipe-laying vessel for inter-array cable installation in water depths up to xx.xx meters. The reference does not establish later configuration changes or a current certified maximum.
3. Giulio Verne-DP2 Cable Laying Vessel: Technical Specifications
   - Prysmian's Giulio Verne description states power-cable laying capability up to xx.xx meters of water depth and separately describes burial tools. This supports cable-specific depth comparison without substituting burial depth.
4. Oceanic King (Polar Marquis)
   - Ulstein records Oceanic King's historical fiber-optic cable conversion and a post-delivery test task to lay cables at xx.xx meters, followed by later seismic reconfiguration. The task wording does not establish its outcome, an exact maximum, or present cable capability.

18.1. Deepwater Capability

Table 154. Global Cable Laying Vessel Market Size, by Deepwater Capability, by Region, 2017-2032 (USD Thousand)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 155. Global Cable Laying Vessel Market Size, by Deepwater Capability, by Group, 2017-2032 (USD Thousand)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 156. Global Cable Laying Vessel Market Size, by Deepwater Capability, by Country, 2017-2032 (USD Thousand)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

18.2. Intermediate-Depth Capability

Table 157. Global Cable Laying Vessel Market Size, by Intermediate-Depth Capability, by Region, 2017-2032 (USD Thousand)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 158. Global Cable Laying Vessel Market Size, by Intermediate-Depth Capability, by Group, 2017-2032 (USD Thousand)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 159. Global Cable Laying Vessel Market Size, by Intermediate-Depth Capability, by Country, 2017-2032 (USD Thousand)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

18.3. Shallow-Water Capability

Table 160. Global Cable Laying Vessel Market Size, by Shallow-Water Capability, by Region, 2017-2032 (USD Thousand)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 161. Global Cable Laying Vessel Market Size, by Shallow-Water Capability, by Group, 2017-2032 (USD Thousand)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 162. Global Cable Laying Vessel Market Size, by Shallow-Water Capability, by Country, 2017-2032 (USD Thousand)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

18.4. Ultra-Deepwater Capability

Table 163. Global Cable Laying Vessel Market Size, by Ultra-Deepwater Capability, by Region, 2017-2032 (USD Thousand)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 164. Global Cable Laying Vessel Market Size, by Ultra-Deepwater Capability, by Group, 2017-2032 (USD Thousand)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 165. Global Cable Laying Vessel Market Size, by Ultra-Deepwater Capability, by Country, 2017-2032 (USD Thousand)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

19. Cable Laying Vessel Market, by Region

North American vessel deployment requires separate assessments of employment obligations and permission to perform the proposed work. ▪▪▪ ▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪ ▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪ Participation in a security program does not establish unrestricted deployment across the region.

▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ RNP procured installation work for the pilot; that service commitment is not evidence of a separate vessel purchase. Builders need an identified asset buyer and accepted operating envelope before translating connectivity programs into construction opportunities.

European construction references demonstrate that delivery capability can span national borders. ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪ Consolidated delivery responsibility can simplify accountability, but only for obligations included in the actual agreement.

Asia-Pacific combines internationally connected vessel construction with differentiated deployment regimes. ▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪ ▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪ A shipbuilding reference does not establish regional deployment rights; country-specific approvals remain a prerequisite when the proposed employment changes.

Middle Eastern repair support has identifiable shore-side infrastructure. E-marine operates cable depots at Hamriyah in the United Arab Emirates and Salalah in Oman and offers installation, maintenance, and repair services. ▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪

[illegible] Owners should verify continuity of the covered service during replacement. Announced delivery targets do not establish that the successor is already available.

Figure 40. Global Cable Laying Vessel Market, by Region: Market share evolution, 2025-2032

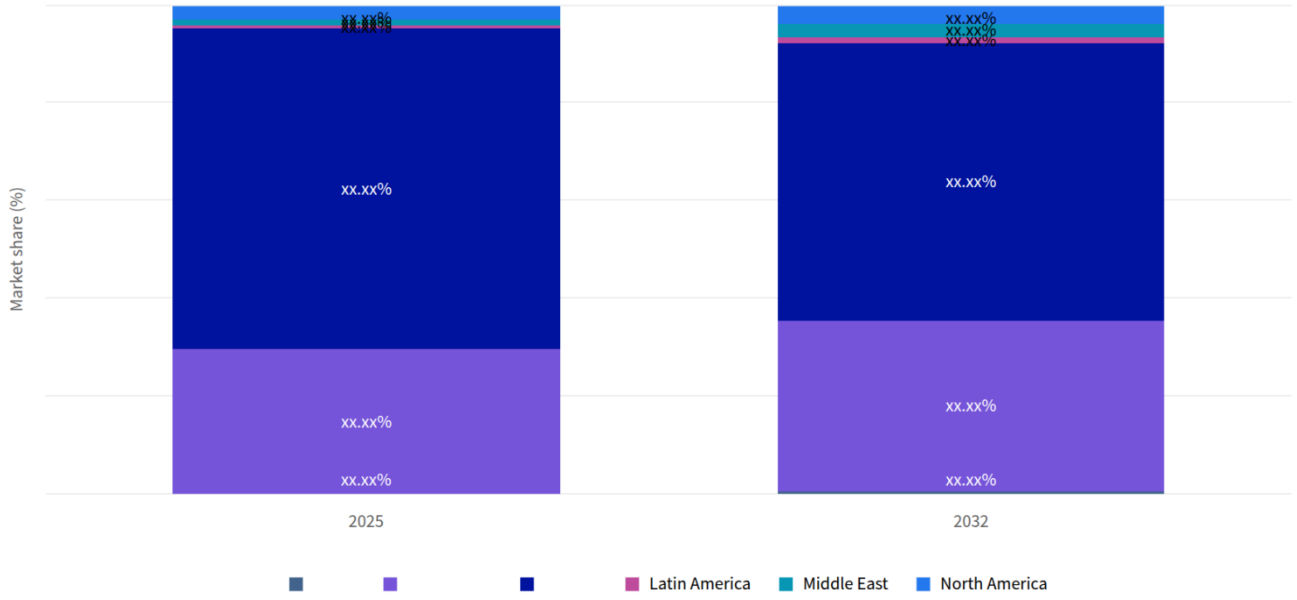

Figure 41. Global Cable Laying Vessel Market, by Region: Market size by category, 2025

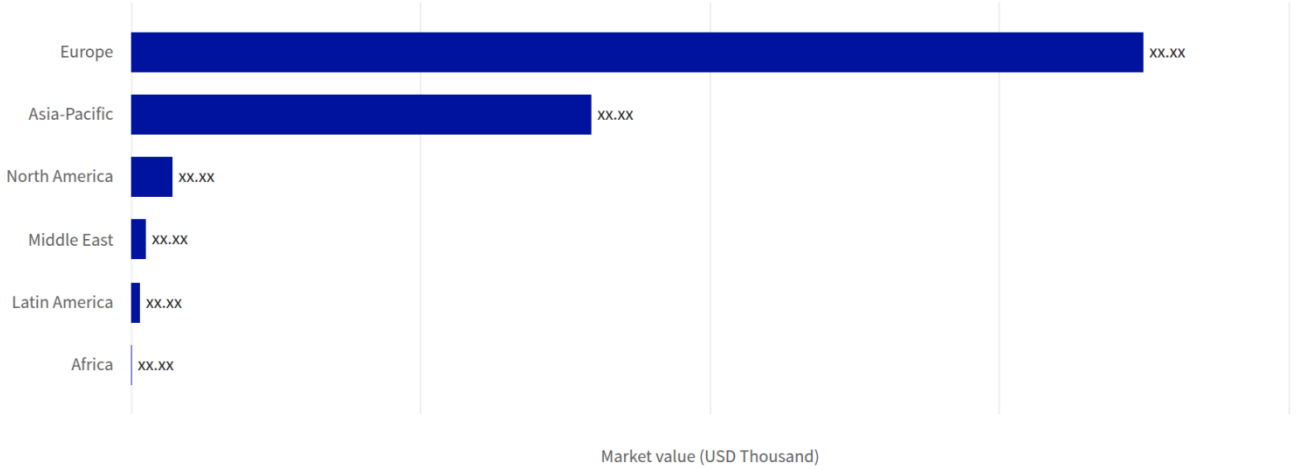

Figure 42. Global Cable Laying Vessel Market, Regional growth by Onboard Power Architecture, 2025-2032 (CAGR %)

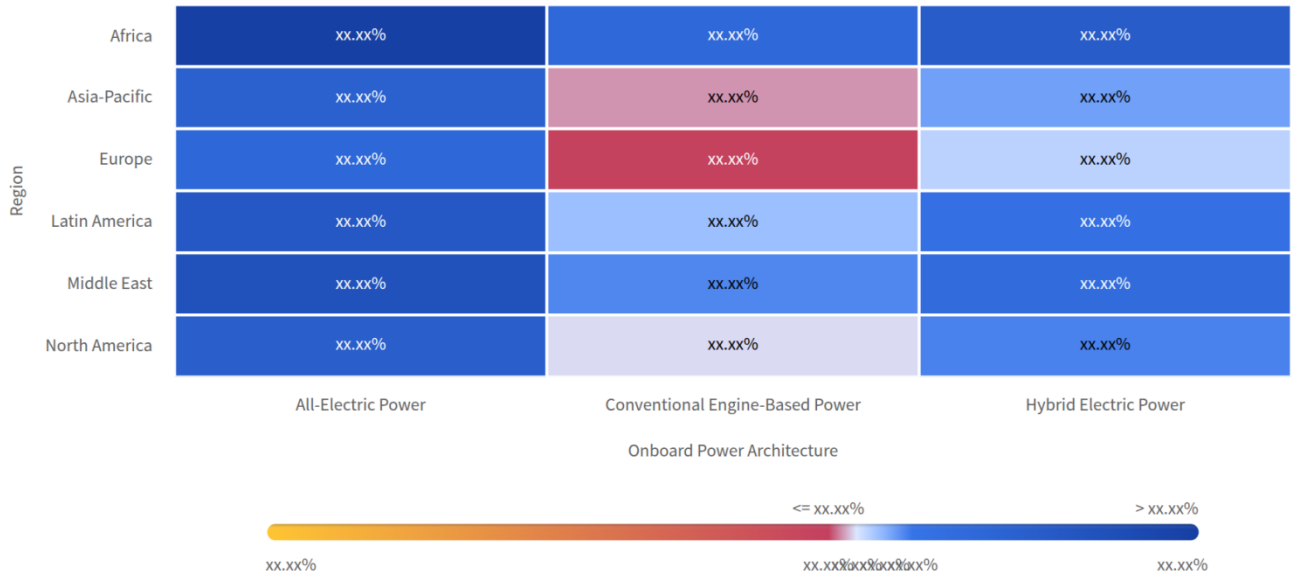

Table 166. Global Cable Laying Vessel Market, by Region growth contribution, 2025-2032

Category	2025 value (USD Thousand)	2032 value (USD Thousand)	Added value (USD Thousand)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 167. Global Cable Laying Vessel Market Size, by Region, 2017-2032 (USD Thousand)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. VARD secures contract for one cable laying vessel for Prysmian Group
   · VARD allocated Romanian hull construction and Norwegian final outfitting, commissioning, and delivery in its Prysmian contracting example; this is a responsibility allocation, not confirmation of subsequent delivery. ([vard.com](https://www.vard.com/articles/vard-secures-contract-for-one-cable-laying-vessel-for-prysmian-group-xx.xx))
2. Orange Marine modernizes its fleet of cable ships to secure digital infrastructure in Europe, Africa and the Middle East
   · Orange announced Sri Lankan construction to replace maintenance vessels based in South Africa and Italy, establishing geographically separated construction and employment roles. ([orange.com](https://www.orange.com/assets/document/xx.xx/download))
3. Cable Security Fleet Program
   · The program sustains privately owned, U.S.-registered cable vessels whose operators must provide ships and services during national emergencies. ([fpi.omb.gov](https://fpi.omb.gov/program/xx.xx.html))
4. Guidance library: Coasting trade activities
   · Transport Canada's guidance requires a coasting trade licence for foreign-registered vessels performing cable laying in Canadian waters. ([tc.canada.ca](https://tc.canada.ca/en/marine-transportation/vessel-licensing-registration/coasting-trade/coasting-trade-canada/guidance-library-coasting-trade-activities))
5. Norte Conectado
   · RNP describes Norte Conectado's subfluvial infrastructure and its procurement of installation work for Infovia xx.xx. This establishes project-service procurement, not a separate vessel acquisition. ([rnp.br](https://www.rnp.br/programas-e-projetos/norte-conectado/))
6. Visita técnica marca o início do lançamento do cabo subfluvial do Programa Norte Conectado
   · RNP's January 2022 account identifies inspection of the barge intended to lay Infovia xx.xx's subfluvial cable. ([rnp.br](https://www.rnp.br/2022/xx.xx/xx.xx/visita-tcnica-marca-o-incio-do-lanamento-do-cabo-subfluvial-do-programa-norte-conectado/))
7. Cable Connectivity and Resilience Centre
   · The Australian initiative tailors assistance across the Indo-Pacific because partner countries have different cable-related systems, policies, regulations, and development circumstances. ([dfat.gov.au](https://www.dfat.gov.au/international-relations/regional-architecture/quad/cable-connectivity-and-resilience-centre))
8. E-marine - About Us
   · E-marine identifies cable depots in Hamriyah, UAE, and Salalah, Oman, alongside its installation, maintenance, and repair offerings. ([emarine.ae](https://emarine.ae/en/AboutUs))

19.1. Europe

Table 168. Europe Cable Laying Vessel Market, by Country growth contribution, 2025-2032

Category	2025 value (USD Thousand)	2032 value (USD Thousand)	Added value (USD Thousand)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Austria	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Belgium	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Denmark	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Finland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Netherlands	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Norway	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Poland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Portugal	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sweden	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Switzerland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unallocated / remaining scope	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 169. Europe Cable Laying Vessel Market Size, by Region, 2017-2032 (USD Thousand)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Austria	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Belgium	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Denmark	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Finland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Netherlands	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Norway	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Poland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Portugal	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sweden	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Switzerland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 170. Europe Cable Laying Vessel Market Size, by Vessel Platform, 2017-2032 (USD Thousand)

Vessel Platform	2023	2024	2025	2026	2027	2032	CAGR (%)
Barges	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ships	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 171. Europe Cable Laying Vessel Market Size, by Mission Configuration, 2017-2032 (USD Thousand)

Mission Configuration	2023	2024	2025	2026	2027	2032	CAGR (%)
Combined Installation and Repair Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Installation-Focused Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multipurpose Construction Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Repair-Focused Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 172. Europe Cable Laying Vessel Market Size, by Cable Compatibility, 2017-2032 (USD Thousand)

Cable Compatibility	2023	2024	2025	2026	2027	2032	CAGR (%)
Communications Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multiple Cable Families	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Power Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sensing Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 173. Europe Cable Laying Vessel Market Size, by Station-Keeping System, 2017-2032 (USD Thousand)

Station-Keeping System	2023	2024	2025	2026	2027	2032	CAGR (%)
Anchored or Moored Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Basic Automatic Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manual or Tug-Assisted Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Seabed-Supported Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 174. Europe Cable Laying Vessel Market Size, by Onboard Power Architecture, 2017-2032 (USD Thousand)

Onboard Power Architecture	2023	2024	2025	2026	2027	2032	CAGR (%)
All-Electric Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Conventional Engine-Based Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Electric Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 175. Europe Cable Laying Vessel Market Size, by Infrastructure Application, 2017-2032 (USD Thousand)

Infrastructure Application	2023	2024	2025	2026	2027	2032	CAGR (%)
Defense and Security Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Industrial Infrastructure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Infrastructure Portfolios	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Offshore Renewable Energy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Power Transmission and Distribution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scientific and Environmental Monitoring	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Telecommunications Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 176. Europe Cable Laying Vessel Market Size, by Vessel Buyer, 2017-2032 (USD Thousand)

Vessel Buyer	2023	2024	2025	2026	2027	2032	CAGR (%)
Captive Infrastructure and Public-Service Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Cable-System Suppliers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Marine Installation and Maintenance Contractors	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Vessel Owners and Leasing Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 177. Europe Cable Laying Vessel Market Size, by Construction Pathway, 2017-2032 (USD Thousand)

Construction Pathway	2023	2024	2025	2026	2027	2032	CAGR (%)
Conversions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Newbuilds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 178. Europe Cable Laying Vessel Market Size, by Operating Envelope, 2017-2032 (USD Thousand)

Operating Envelope	2023	2024	2025	2026	2027	2032	CAGR (%)
Restricted Seagoing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sheltered and Inland Waters	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unrestricted Seagoing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 179. Europe Cable Laying Vessel Market Size, by Procurement Structure, 2017-2032 (USD Thousand)

Procurement Structure	2023	2024	2025	2026	2027	2032	CAGR (%)
Buyer-Managed Package Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Prime Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 180. Europe Cable Laying Vessel Market Size, by Cable Payload Capacity, 2017-2032 (USD Thousand)

Cable Payload Capacity	2023	2024	2025	2026	2027	2032	CAGR (%)
High Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Medium Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-High Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 181. Europe Cable Laying Vessel Market Size, by Cable-Laying Depth Capability, 2017-2032 (USD Thousand)

Cable-Laying Depth Capability	2023	2024	2025	2026	2027	2032	CAGR (%)
Deepwater Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intermediate-Depth Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Shallow-Water Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-Deepwater Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

19.2. Asia-Pacific

Table 182. Asia-Pacific Cable Laying Vessel Market, by Country growth contribution, 2025-2032

Category	2025 value (USD Thousand)	2032 value (USD Thousand)	Added value (USD Thousand)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Indonesia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Malaysia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Philippines	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Singapore	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Taiwan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Thailand	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unallocated / remaining scope	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 183. Asia-Pacific Cable Laying Vessel Market Size, by Region, 2017-2032 (USD Thousand)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Indonesia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Malaysia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Philippines	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Singapore	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Taiwan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Thailand	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 184. Asia-Pacific Cable Laying Vessel Market Size, by Vessel Platform, 2017-2032 (USD Thousand)

Vessel Platform	2023	2024	2025	2026	2027	2032	CAGR (%)
Barges	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ships	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 185. Asia-Pacific Cable Laying Vessel Market Size, by Mission Configuration, 2017-2032 (USD Thousand)

Mission Configuration	2023	2024	2025	2026	2027	2032	CAGR (%)
Combined Installation and Repair Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Installation-Focused Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multipurpose Construction Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Repair-Focused Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 186. Asia-Pacific Cable Laying Vessel Market Size, by Cable Compatibility, 2017-2032 (USD Thousand)

Cable Compatibility	2023	2024	2025	2026	2027	2032	CAGR (%)
Communications Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multiple Cable Families	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Power Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sensing Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 187. Asia-Pacific Cable Laying Vessel Market Size, by Station-Keeping System, 2017-2032 (USD Thousand)

Station-Keeping System	2023	2024	2025	2026	2027	2032	CAGR (%)
Anchored or Moored Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Basic Automatic Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manual or Tug-Assisted Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Seabed-Supported Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 188. Asia-Pacific Cable Laying Vessel Market Size, by Onboard Power Architecture, 2017-2032 (USD Thousand)

Onboard Power Architecture	2023	2024	2025	2026	2027	2032	CAGR (%)
All-Electric Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Conventional Engine-Based Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Electric Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 189. Asia-Pacific Cable Laying Vessel Market Size, by Infrastructure Application, 2017-2032 (USD Thousand)

Infrastructure Application	2023	2024	2025	2026	2027	2032	CAGR (%)
Defense and Security Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Industrial Infrastructure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Infrastructure Portfolios	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Offshore Renewable Energy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Power Transmission and Distribution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scientific and Environmental Monitoring	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Telecommunications Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 190. Asia-Pacific Cable Laying Vessel Market Size, by Vessel Buyer, 2017-2032 (USD Thousand)

Vessel Buyer	2023	2024	2025	2026	2027	2032	CAGR (%)
Captive Infrastructure and Public-Service Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Cable-System Suppliers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Marine Installation and Maintenance Contractors	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Vessel Owners and Leasing Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 191. Asia-Pacific Cable Laying Vessel Market Size, by Construction Pathway, 2017-2032 (USD Thousand)

Construction Pathway	2023	2024	2025	2026	2027	2032	CAGR (%)
Conversions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Newbuilds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 192. Asia-Pacific Cable Laying Vessel Market Size, by Operating Envelope, 2017-2032 (USD Thousand)

Operating Envelope	2023	2024	2025	2026	2027	2032	CAGR (%)
Restricted Seagoing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sheltered and Inland Waters	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unrestricted Seagoing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 193. Asia-Pacific Cable Laying Vessel Market Size, by Procurement Structure, 2017-2032 (USD Thousand)

Procurement Structure	2023	2024	2025	2026	2027	2032	CAGR (%)
Buyer-Managed Package Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Prime Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 194. Asia-Pacific Cable Laying Vessel Market Size, by Cable Payload Capacity, 2017-2032 (USD Thousand)

Cable Payload Capacity	2023	2024	2025	2026	2027	2032	CAGR (%)
High Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Medium Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-High Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 195. Asia-Pacific Cable Laying Vessel Market Size, by Cable-Laying Depth Capability, 2017-2032 (USD Thousand)

Cable-Laying Depth Capability	2023	2024	2025	2026	2027	2032	CAGR (%)
Deepwater Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intermediate-Depth Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Shallow-Water Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-Deepwater Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

19.3. North America

Table 196. North America Cable Laying Vessel Market, by Country growth contribution, 2025-2032

Category	2025 value (USD Thousand)	2032 value (USD Thousand)	Added value (USD Thousand)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unallocated / remaining scope	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 197. North America Cable Laying Vessel Market Size, by Region, 2017-2032 (USD Thousand)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 198. North America Cable Laying Vessel Market Size, by Vessel Platform, 2017-2032 (USD Thousand)

Vessel Platform	2023	2024	2025	2026	2027	2032	CAGR (%)
Barges	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ships	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 199. North America Cable Laying Vessel Market Size, by Mission Configuration, 2017-2032 (USD Thousand)

Mission Configuration	2023	2024	2025	2026	2027	2032	CAGR (%)
Combined Installation and Repair Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Installation-Focused Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multipurpose Construction Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Repair-Focused Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 200. North America Cable Laying Vessel Market Size, by Cable Compatibility, 2017-2032 (USD Thousand)

Cable Compatibility	2023	2024	2025	2026	2027	2032	CAGR (%)
Communications Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multiple Cable Families	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Power Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sensing Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 201. North America Cable Laying Vessel Market Size, by Station-Keeping System, 2017-2032 (USD Thousand)

Station-Keeping System	2023	2024	2025	2026	2027	2032	CAGR (%)
Anchored or Moored Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Basic Automatic Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manual or Tug-Assisted Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Seabed-Supported Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 202. North America Cable Laying Vessel Market Size, by Onboard Power Architecture, 2017-2032 (USD Thousand)

Onboard Power Architecture	2023	2024	2025	2026	2027	2032	CAGR (%)
All-Electric Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Conventional Engine-Based Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Electric Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 203. North America Cable Laying Vessel Market Size, by Infrastructure Application, 2017-2032 (USD Thousand)

Infrastructure Application	2023	2024	2025	2026	2027	2032	CAGR (%)
Defense and Security Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Industrial Infrastructure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Infrastructure Portfolios	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Offshore Renewable Energy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Power Transmission and Distribution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scientific and Environmental Monitoring	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Telecommunications Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 204. North America Cable Laying Vessel Market Size, by Vessel Buyer, 2017-2032 (USD Thousand)

Vessel Buyer	2023	2024	2025	2026	2027	2032	CAGR (%)
Captive Infrastructure and Public-Service Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Cable-System Suppliers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Marine Installation and Maintenance Contractors	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Vessel Owners and Leasing Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 205. North America Cable Laying Vessel Market Size, by Construction Pathway, 2017-2032 (USD Thousand)

Construction Pathway	2023	2024	2025	2026	2027	2032	CAGR (%)
Conversions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Newbuilds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 206. North America Cable Laying Vessel Market Size, by Operating Envelope, 2017-2032 (USD Thousand)

Operating Envelope	2023	2024	2025	2026	2027	2032	CAGR (%)
Restricted Seagoing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sheltered and Inland Waters	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unrestricted Seagoing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 207. North America Cable Laying Vessel Market Size, by Procurement Structure, 2017-2032 (USD Thousand)

Procurement Structure	2023	2024	2025	2026	2027	2032	CAGR (%)
Buyer-Managed Package Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Prime Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 208. North America Cable Laying Vessel Market Size, by Cable Payload Capacity, 2017-2032 (USD Thousand)

Cable Payload Capacity	2023	2024	2025	2026	2027	2032	CAGR (%)
High Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Medium Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-High Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 209. North America Cable Laying Vessel Market Size, by Cable-Laying Depth Capability, 2017-2032 (USD Thousand)

Cable-Laying Depth Capability	2023	2024	2025	2026	2027	2032	CAGR (%)
Deepwater Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intermediate-Depth Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Shallow-Water Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-Deepwater Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

19.4. Middle East

Table 210. Middle East Cable Laying Vessel Market, by Country growth contribution, 2025-2032

Category	2025 value (USD Thousand)	2032 value (USD Thousand)	Added value (USD Thousand)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Israel	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Qatar	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Saudi Arabia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Turkey	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unallocated / remaining scope	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Arab Emirates	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 211. Middle East Cable Laying Vessel Market Size, by Region, 2017-2032 (USD Thousand)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Israel	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Qatar	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Saudi Arabia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Turkey	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Arab Emirates	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 212. Middle East Cable Laying Vessel Market Size, by Vessel Platform, 2017-2032 (USD Thousand)

Vessel Platform	2023	2024	2025	2026	2027	2032	CAGR (%)
Barges	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ships	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 213. Middle East Cable Laying Vessel Market Size, by Mission Configuration, 2017-2032 (USD Thousand)

Mission Configuration	2023	2024	2025	2026	2027	2032	CAGR (%)
Combined Installation and Repair Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Installation-Focused Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multipurpose Construction Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Repair-Focused Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 214. Middle East Cable Laying Vessel Market Size, by Cable Compatibility, 2017-2032 (USD Thousand)

Cable Compatibility	2023	2024	2025	2026	2027	2032	CAGR (%)
Communications Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multiple Cable Families	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Power Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sensing Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 215. Middle East Cable Laying Vessel Market Size, by Station-Keeping System, 2017-2032 (USD Thousand)

Station-Keeping System	2023	2024	2025	2026	2027	2032	CAGR (%)
Anchored or Moored Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Basic Automatic Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manual or Tug-Assisted Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Seabed-Supported Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 216. Middle East Cable Laying Vessel Market Size, by Onboard Power Architecture, 2017-2032 (USD Thousand)

Onboard Power Architecture	2023	2024	2025	2026	2027	2032	CAGR (%)
All-Electric Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Conventional Engine-Based Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Electric Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 217. Middle East Cable Laying Vessel Market Size, by Infrastructure Application, 2017-2032 (USD Thousand)

Infrastructure Application	2023	2024	2025	2026	2027	2032	CAGR (%)
Defense and Security Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Industrial Infrastructure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Infrastructure Portfolios	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Offshore Renewable Energy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Power Transmission and Distribution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scientific and Environmental Monitoring	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Telecommunications Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 218. Middle East Cable Laying Vessel Market Size, by Vessel Buyer, 2017-2032 (USD Thousand)

Vessel Buyer	2023	2024	2025	2026	2027	2032	CAGR (%)
Captive Infrastructure and Public-Service Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Cable-System Suppliers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Marine Installation and Maintenance Contractors	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Vessel Owners and Leasing Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 219. Middle East Cable Laying Vessel Market Size, by Construction Pathway, 2017-2032 (USD Thousand)

Construction Pathway	2023	2024	2025	2026	2027	2032	CAGR (%)
Conversions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Newbuilds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 220. Middle East Cable Laying Vessel Market Size, by Operating Envelope, 2017-2032 (USD Thousand)

Operating Envelope	2023	2024	2025	2026	2027	2032	CAGR (%)
Restricted Seagoing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sheltered and Inland Waters	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unrestricted Seagoing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 221. Middle East Cable Laying Vessel Market Size, by Procurement Structure, 2017-2032 (USD Thousand)

Procurement Structure	2023	2024	2025	2026	2027	2032	CAGR (%)
Buyer-Managed Package Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Prime Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 222. Middle East Cable Laying Vessel Market Size, by Cable Payload Capacity, 2017-2032 (USD Thousand)

Cable Payload Capacity	2023	2024	2025	2026	2027	2032	CAGR (%)
High Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Medium Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-High Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 223. Middle East Cable Laying Vessel Market Size, by Cable-Laying Depth Capability, 2017-2032 (USD Thousand)

Cable-Laying Depth Capability	2023	2024	2025	2026	2027	2032	CAGR (%)
Deepwater Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intermediate-Depth Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Shallow-Water Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-Deepwater Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

19.5. Latin America

Table 224. Latin America Cable Laying Vessel Market, by Country growth contribution, 2025-2032

Category	2025 value (USD Thousand)	2032 value (USD Thousand)	Added value (USD Thousand)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Argentina	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chile	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Colombia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Peru	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unallocated / remaining scope	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 225. Latin America Cable Laying Vessel Market Size, by Region, 2017-2032 (USD Thousand)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Argentina	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chile	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Colombia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Peru	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 226. Latin America Cable Laying Vessel Market Size, by Vessel Platform, 2017-2032 (USD Thousand)

Vessel Platform	2023	2024	2025	2026	2027	2032	CAGR (%)
Barges	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ships	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 227. Latin America Cable Laying Vessel Market Size, by Mission Configuration, 2017-2032 (USD Thousand)

Mission Configuration	2023	2024	2025	2026	2027	2032	CAGR (%)
Combined Installation and Repair Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Installation-Focused Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multipurpose Construction Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Repair-Focused Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 228. Latin America Cable Laying Vessel Market Size, by Cable Compatibility, 2017-2032 (USD Thousand)

Cable Compatibility	2023	2024	2025	2026	2027	2032	CAGR (%)
Communications Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multiple Cable Families	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Power Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sensing Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 229. Latin America Cable Laying Vessel Market Size, by Station-Keeping System, 2017-2032 (USD Thousand)

Station-Keeping System	2023	2024	2025	2026	2027	2032	CAGR (%)
Anchored or Moored Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Basic Automatic Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manual or Tug-Assisted Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Seabed-Supported Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 230. Latin America Cable Laying Vessel Market Size, by Onboard Power Architecture, 2017-2032 (USD Thousand)

Onboard Power Architecture	2023	2024	2025	2026	2027	2032	CAGR (%)
All-Electric Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Conventional Engine-Based Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Electric Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 231. Latin America Cable Laying Vessel Market Size, by Infrastructure Application, 2017-2032 (USD Thousand)

Infrastructure Application	2023	2024	2025	2026	2027	2032	CAGR (%)
Defense and Security Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Industrial Infrastructure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Infrastructure Portfolios	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Offshore Renewable Energy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Power Transmission and Distribution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scientific and Environmental Monitoring	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Telecommunications Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 232. Latin America Cable Laying Vessel Market Size, by Vessel Buyer, 2017-2032 (USD Thousand)

Vessel Buyer	2023	2024	2025	2026	2027	2032	CAGR (%)
Captive Infrastructure and Public-Service Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Cable-System Suppliers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Marine Installation and Maintenance Contractors	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Vessel Owners and Leasing Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 233. Latin America Cable Laying Vessel Market Size, by Construction Pathway, 2017-2032 (USD Thousand)

Construction Pathway	2023	2024	2025	2026	2027	2032	CAGR (%)
Conversions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Newbuilds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 234. Latin America Cable Laying Vessel Market Size, by Operating Envelope, 2017-2032 (USD Thousand)

Operating Envelope	2023	2024	2025	2026	2027	2032	CAGR (%)
Restricted Seagoing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sheltered and Inland Waters	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unrestricted Seagoing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 235. Latin America Cable Laying Vessel Market Size, by Procurement Structure, 2017-2032 (USD Thousand)

Procurement Structure	2023	2024	2025	2026	2027	2032	CAGR (%)
Buyer-Managed Package Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Prime Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 236. Latin America Cable Laying Vessel Market Size, by Cable Payload Capacity, 2017-2032 (USD Thousand)

Cable Payload Capacity	2023	2024	2025	2026	2027	2032	CAGR (%)
High Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Medium Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-High Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 237. Latin America Cable Laying Vessel Market Size, by Cable-Laying Depth Capability, 2017-2032 (USD Thousand)

Cable-Laying Depth Capability	2023	2024	2025	2026	2027	2032	CAGR (%)
Deepwater Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intermediate-Depth Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Shallow-Water Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-Deepwater Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

19.6. Africa

Table 238. Africa Cable Laying Vessel Market, by Country growth contribution, 2025-2032

Category	2025 value (USD Thousand)	2032 value (USD Thousand)	Added value (USD Thousand)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Egypt	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Kenya	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nigeria	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unallocated / remaining scope	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 239. Africa Cable Laying Vessel Market Size, by Region, 2017-2032 (USD Thousand)

Region	2023	2024	2025	2026	2027	2032	CAGR (%)
Egypt	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Kenya	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nigeria	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 240. Africa Cable Laying Vessel Market Size, by Vessel Platform, 2017-2032 (USD Thousand)

Vessel Platform	2023	2024	2025	2026	2027	2032	CAGR (%)
Barges	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ships	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 241. Africa Cable Laying Vessel Market Size, by Mission Configuration, 2017-2032 (USD Thousand)

Mission Configuration	2023	2024	2025	2026	2027	2032	CAGR (%)
Combined Installation and Repair Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Installation-Focused Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multipurpose Construction Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Repair-Focused Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 242. Africa Cable Laying Vessel Market Size, by Cable Compatibility, 2017-2032 (USD Thousand)

Cable Compatibility	2023	2024	2025	2026	2027	2032	CAGR (%)
Communications Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multiple Cable Families	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Power Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sensing Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 243. Africa Cable Laying Vessel Market Size, by Station-Keeping System, 2017-2032 (USD Thousand)

Station-Keeping System	2023	2024	2025	2026	2027	2032	CAGR (%)
Anchored or Moored Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Basic Automatic Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manual or Tug-Assisted Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Seabed-Supported Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 244. Africa Cable Laying Vessel Market Size, by Onboard Power Architecture, 2017-2032 (USD Thousand)

Onboard Power Architecture	2023	2024	2025	2026	2027	2032	CAGR (%)
All-Electric Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Conventional Engine-Based Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Electric Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 245. Africa Cable Laying Vessel Market Size, by Infrastructure Application, 2017-2032 (USD Thousand)

Infrastructure Application	2023	2024	2025	2026	2027	2032	CAGR (%)
Defense and Security Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Industrial Infrastructure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Infrastructure Portfolios	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Offshore Renewable Energy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Power Transmission and Distribution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scientific and Environmental Monitoring	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Telecommunications Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 246. Africa Cable Laying Vessel Market Size, by Vessel Buyer, 2017-2032 (USD Thousand)

Vessel Buyer	2023	2024	2025	2026	2027	2032	CAGR (%)
Captive Infrastructure and Public-Service Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Cable-System Suppliers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Marine Installation and Maintenance Contractors	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Vessel Owners and Leasing Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 247. Africa Cable Laying Vessel Market Size, by Construction Pathway, 2017-2032 (USD Thousand)

Construction Pathway	2023	2024	2025	2026	2027	2032	CAGR (%)
Conversions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Newbuilds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 248. Africa Cable Laying Vessel Market Size, by Operating Envelope, 2017-2032 (USD Thousand)

Operating Envelope	2023	2024	2025	2026	2027	2032	CAGR (%)
Restricted Seagoing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sheltered and Inland Waters	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unrestricted Seagoing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 249. Africa Cable Laying Vessel Market Size, by Procurement Structure, 2017-2032 (USD Thousand)

Procurement Structure	2023	2024	2025	2026	2027	2032	CAGR (%)
Buyer-Managed Package Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Prime Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 250. Africa Cable Laying Vessel Market Size, by Cable Payload Capacity, 2017-2032 (USD Thousand)

Cable Payload Capacity	2023	2024	2025	2026	2027	2032	CAGR (%)
High Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Medium Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-High Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 251. Africa Cable Laying Vessel Market Size, by Cable-Laying Depth Capability, 2017-2032 (USD Thousand)

Cable-Laying Depth Capability	2023	2024	2025	2026	2027	2032	CAGR (%)
Deepwater Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intermediate-Depth Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Shallow-Water Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-Deepwater Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

20. Cable Laying Vessel Market, by Group

For the Americas, maintenance zones provide a more actionable commercial organizing principle than a single continental fleet proposition. ▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ Atlantic and Pacific arrangements should not be treated as interchangeable.

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ASEAN's enhanced submarine-cable guidelines, endorsed in January 2026, recommend streamlined permits, government contact points, and coordination between agencies and cable operators. ▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ Coordinated procedures may improve access, but regional endorsement alone is insufficient grounds for an unconditional service commitment.

The GCC has a shared infrastructure owner relevant to power-cable employment, but the grid is not uniformly submarine. GCCIA combines overhead transmission with a submarine connection to Bahrain. ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪ ▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪

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Nordic cooperation emphasizes secure communications-cable supply chains, laying and repair capabilities, and public-private coordination. ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ Shared readiness can broaden access; bilateral arrangements may be preferable when those responsibilities cannot be aligned.

The European Union provides a concrete equipment-led resilience pathway. ▪▪▪ ▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪ ▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ Modular provision preserves asset choice, but does not demonstrate suitability for every power-cable or installation mission.

European Union deployment also creates emissions responsibilities that are independent of the construction location. EU ETS coverage extends to offshore ships of at least xx.xx gross tonnage from the 2027 reporting period, with exposure determined by applicable voyage scope rather than flag alone. ▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪

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G7 cooperation focuses on secure and resilient cable connectivity, including Arctic and Pacific routes and coordination of technical security requirements. ▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ Policy alignment is a prospect-screening signal, not evidence that participating countries will procure equivalent vessels.

NATO's Baltic Sentry announcement concerns infrastructure protection and surveillance, not a cable-laying-vessel award. It also identifies engagement with industry through the Critical Undersea Infrastructure Network. ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪

▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ Their different funding, infrastructure, service, and security mechanisms are complementary analytical lenses, not additive commercial opportunities.

Figure 43. Global Cable Laying Vessel Market Size, by Group, 2025 vs 2026 vs 2032

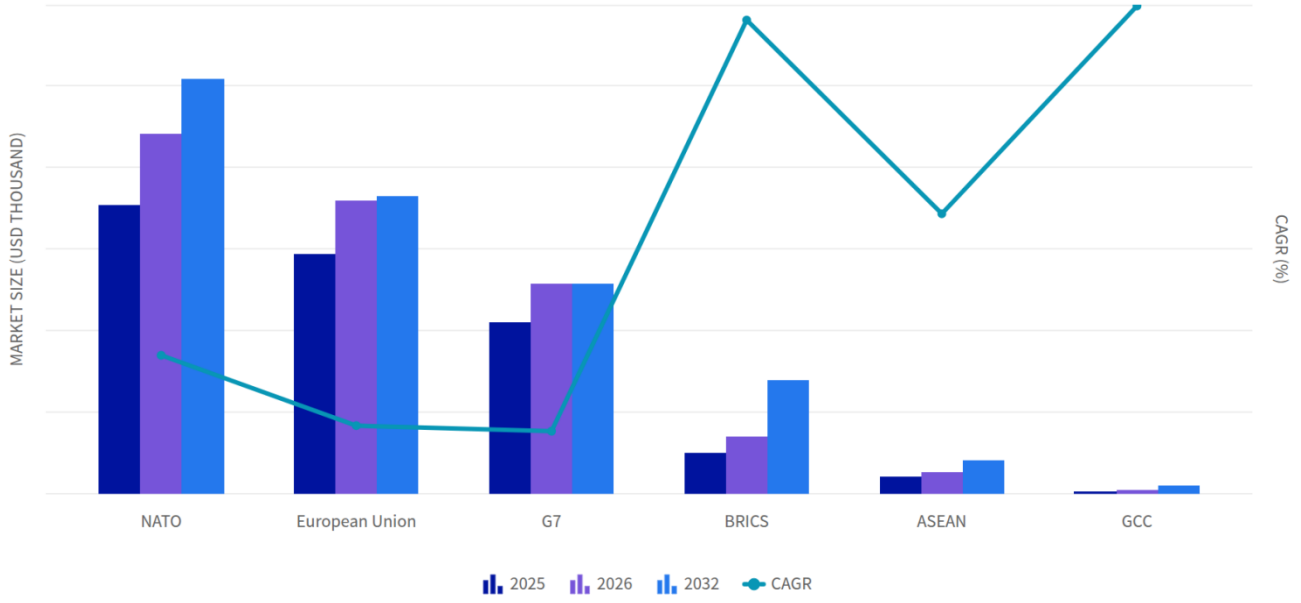

Table 252. Global Cable Laying Vessel Market Size, by Group, 2017-2032 (USD Thousand)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Sources & Evidence

1. Orange Marine modernizes its fleet of cable ships to secure digital infrastructure in Europe, Africa and the Middle East

   · The renewal covers cross-regional maintenance roles; deliveries in 2028 and 2029 were expectations, not completed replacements. ([orange.com](https://www.orange.com/assets/document/xx.xx/download))

2. Subsea Cable Maintenance

· Global Marine describes distinct Atlantic and North American Pacific coverage, dedicated vessels and depots, and approval requirements for outside work. The ownership comparison is conditional commercial analysis. ([globalmarine.co.uk](https://globalmarine.co.uk/services/subsea-cable-maintenance/))

3. CEF-Digital second call for proposals to increase Europe's submarine cable repair capacities launched this year, investing a further EUR 40 million

· The June 2026 call concerns telecommunications repair modules for eligible public emergency-response organizations and identification of compatible receiving vessels, not unrestricted vessel acquisition. ([hadea.ec.europa.eu](https://hadea.ec.europa.eu/news/cef-digital-second-call-proposals-increase-europes-submarine-cable-repair-capacities-launched-year-2026-xx.xx-18_en))

4. FAQ - Maritime transport in EU Emissions Trading System (ETS)

· Offshore ships of at least xx.xx gross tonnage enter EU ETS coverage from the 2027 reporting period. The framework is flag-neutral and route-based. ([climate.ec.europa.eu](https://climate.ec.europa.eu/areas-action/transport-decarbonisation/reducing-emissions-shipping-sector/faq-maritime-transport-eu-emissions-trading-system-ets_en))

5. Singapore Contributes Regional Anti-Scam Guide and Enhanced Cable Guidelines at 6th ASEAN Digital Ministers' Meeting

· January 2026 ASEAN guidelines recommend streamlined permits, government contact points, and agency-operator coordination. The announcement describes practices members can adopt, not identical domestic implementation. ([mddi.gov.sg](https://www.mddi.gov.sg/newsroom/singapore-contributes-regional-anti-scam-guide-and-enhanced-cable-guidelines-at-6th-asean-digital-ministers--meeting/))

6. Guidelines on Deployment of Submarine Cables into Singapore

· Singapore's deployment guidance describes telecommunications licensing and marine approvals, supporting a country-specific implementation boundary within ASEAN. ([imda.gov.sg](https://www.imda.gov.sg/-/media/Imda/Files/Regulation-Licensing-and-Consultations/Codes-of-Practice-and-Guidelines/SubCableLanding.pdf))

7. Our Network

· GCCIA describes a network combining overhead lines and submarine cables, including the Bahrain connection. Identifying the marine package separately from total grid activity is an analytical implication. ([gccia.com.sa](https://gccia.com.sa/gccia-grid/our-existing-network/))

8. All Pacific Islands Forum members now connected by undersea cables

· Australia's August xx.xx 2026 announcement identifies New Zealand and other partners supporting Pacific cable connectivity and resilience projects; it does not announce joint vessel ownership. ([ministers.dfat.gov.au](https://ministers.dfat.gov.au/minister/pat-conroy/media-release/all-pacific-islands-forum-members-now-connected-undersea-cables))

9. Joint statement, Nordic and Baltic Ministers of Digitalisation

· The Nordic-Baltic statement emphasizes secure communications-cable supply chains, laying and repair capabilities, and public-private collaboration. Contractual governance recommendations remain conditional analysis. ([norden.org](https://www.norden.org/en/declaration/joint-statement-nordic-and-baltic-ministers-digitalisation))

10. Under India's BRICS Chairship, Transport Ministers Adopt Ministerial Declaration at the 3rd BRICS Transport Ministers' Meeting in Nagpur, Maharashtra

· The July 2026 BRICS transport declaration addresses transport decarbonization and logistics supply-chain cooperation. It does not establish the collective cable-vessel purchasing conditions discussed in the analysis. ([pib.gov.in](https://www.pib.gov.in/PressReleasePage.aspx?PRID=xx.xx&lang=xx.xx®=xx.xx))

11. Ementa AC-417-2023

· ANTAQ's submarine-cable repair ruling illustrates a national authorization gate separate from transport-policy cooperation. ([juris.antaq.gov.br](https://juris.antaq.gov.br/index.php/2023/xx.xx/xx.xx/ementa-ac-xx.xx-2023/))

12. Apulia G7 Leaders' Communiqué
    - G7 leaders committed to cooperation on resilient undersea connectivity, Arctic and Pacific routes, and technical security coordination; the cited passage is a policy commitment rather than a vessel award. ([consilium.europa.eu](https://www.consilium.europa.eu/media/fttjqncg/apulia-g7-leaders-communique.pdf))
13. NATO launches 'Baltic Sentry' to increase critical infrastructure security
    - NATO's Baltic Sentry announcement concerns infrastructure protection and surveillance and identifies industry engagement through its Critical Undersea Infrastructure Network, not a cable-vessel award. ([nato.int](https://www.nato.int/en/news-and-events/articles/news/2025/xx.xx/xx.xx/nato-launches-baltic-sentry-to-increase-critical-infrastructure-security))

20.1. NATO

Table 253. NATO Cable Laying Vessel Market, by Country growth contribution, 2025-2032

Category	2025 value (USD Thousand)	2032 value (USD Thousand)	Added value (USD Thousand)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Albania	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Belgium	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Bulgaria	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Croatia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Czech Republic	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Denmark	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Estonia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Finland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Greece	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hungary	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Iceland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latvia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Lithuania	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Luxembourg	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Montenegro	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Netherlands	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North Macedonia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Norway	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Poland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 253 - continued

Category	2025 value (USD Thousand)	2032 value (USD Thousand)	Added value (USD Thousand)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Portugal	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Romania	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Slovakia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Slovenia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sweden	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Turkey	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 254. NATO Cable Laying Vessel Market Size, by Group, 2017-2032 (USD Thousand)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
Albania	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Belgium	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Bulgaria	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Croatia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Czech Republic	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Denmark	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Estonia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Finland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Greece	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hungary	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Iceland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latvia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Lithuania	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Luxembourg	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Montenegro	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Netherlands	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North Macedonia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Norway	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Poland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Portugal	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Romania	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Slovakia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Slovenia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sweden	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Turkey	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 255. NATO Cable Laying Vessel Market Size, by Vessel Platform, 2017-2032 (USD Thousand)

Vessel Platform	2023	2024	2025	2026	2027	2032	CAGR (%)
Barges	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ships	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 256. NATO Cable Laying Vessel Market Size, by Mission Configuration, 2017-2032 (USD Thousand)

Mission Configuration	2023	2024	2025	2026	2027	2032	CAGR (%)
Combined Installation and Repair Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Installation-Focused Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multipurpose Construction Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Repair-Focused Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 257. NATO Cable Laying Vessel Market Size, by Cable Compatibility, 2017-2032 (USD Thousand)

Cable Compatibility	2023	2024	2025	2026	2027	2032	CAGR (%)
Communications Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multiple Cable Families	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Power Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sensing Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 258. NATO Cable Laying Vessel Market Size, by Station-Keeping System, 2017-2032 (USD Thousand)

Station-Keeping System	2023	2024	2025	2026	2027	2032	CAGR (%)
Anchored or Moored Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Basic Automatic Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manual or Tug-Assisted Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Seabed-Supported Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 259. NATO Cable Laying Vessel Market Size, by Onboard Power Architecture, 2017-2032 (USD Thousand)

Onboard Power Architecture	2023	2024	2025	2026	2027	2032	CAGR (%)
All-Electric Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Conventional Engine-Based Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Electric Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 260. NATO Cable Laying Vessel Market Size, by Infrastructure Application, 2017-2032 (USD Thousand)

Infrastructure Application	2023	2024	2025	2026	2027	2032	CAGR (%)
Defense and Security Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Industrial Infrastructure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Infrastructure Portfolios	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Offshore Renewable Energy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Power Transmission and Distribution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scientific and Environmental Monitoring	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Telecommunications Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 261. NATO Cable Laying Vessel Market Size, by Vessel Buyer, 2017-2032 (USD Thousand)

Vessel Buyer	2023	2024	2025	2026	2027	2032	CAGR (%)
Captive Infrastructure and Public-Service Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Cable-System Suppliers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Marine Installation and Maintenance Contractors	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Vessel Owners and Leasing Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 262. NATO Cable Laying Vessel Market Size, by Construction Pathway, 2017-2032 (USD Thousand)

Construction Pathway	2023	2024	2025	2026	2027	2032	CAGR (%)
Conversions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Newbuilds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 263. NATO Cable Laying Vessel Market Size, by Operating Envelope, 2017-2032 (USD Thousand)

Operating Envelope	2023	2024	2025	2026	2027	2032	CAGR (%)
Restricted Seagoing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sheltered and Inland Waters	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unrestricted Seagoing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 264. NATO Cable Laying Vessel Market Size, by Procurement Structure, 2017-2032 (USD Thousand)

Procurement Structure	2023	2024	2025	2026	2027	2032	CAGR (%)
Buyer-Managed Package Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Prime Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 265. NATO Cable Laying Vessel Market Size, by Cable Payload Capacity, 2017-2032 (USD Thousand)

Cable Payload Capacity	2023	2024	2025	2026	2027	2032	CAGR (%)
High Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Medium Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-High Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 266. NATO Cable Laying Vessel Market Size, by Cable-Laying Depth Capability, 2017-2032 (USD Thousand)

Cable-Laying Depth Capability	2023	2024	2025	2026	2027	2032	CAGR (%)
Deepwater Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intermediate-Depth Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Shallow-Water Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-Deepwater Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

20.2. European Union

Table 267. European Union Cable Laying Vessel Market, by Country growth contribution, 2025-2032

Category	2025 value (USD Thousand)	2032 value (USD Thousand)	Added value (USD Thousand)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Austria	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Belgium	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Bulgaria	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Croatia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Cyprus	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Czech Republic	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Denmark	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Estonia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Finland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Greece	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hungary	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ireland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latvia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Lithuania	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Luxembourg	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Malta	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Netherlands	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Poland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Portugal	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Romania	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Slovakia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Slovenia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sweden	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 268. European Union Cable Laying Vessel Market Size, by Group, 2017-2032 (USD Thousand)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
Austria	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Belgium	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Bulgaria	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Croatia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Cyprus	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Czech Republic	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Denmark	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Estonia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Finland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Greece	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hungary	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ireland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latvia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Lithuania	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Luxembourg	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Malta	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Netherlands	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Poland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Portugal	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Romania	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Slovakia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Slovenia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sweden	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 269. European Union Cable Laying Vessel Market Size, by Vessel Platform, 2017-2032 (USD Thousand)

Vessel Platform	2023	2024	2025	2026	2027	2032	CAGR (%)
Barges	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ships	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 270. European Union Cable Laying Vessel Market Size, by Mission Configuration, 2017-2032 (USD Thousand)

Mission Configuration	2023	2024	2025	2026	2027	2032	CAGR (%)
Combined Installation and Repair Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Installation-Focused Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multipurpose Construction Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Repair-Focused Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 271. European Union Cable Laying Vessel Market Size, by Cable Compatibility, 2017-2032 (USD Thousand)

Cable Compatibility	2023	2024	2025	2026	2027	2032	CAGR (%)
Communications Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multiple Cable Families	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Power Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sensing Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 272. European Union Cable Laying Vessel Market Size, by Station-Keeping System, 2017-2032 (USD Thousand)

Station-Keeping System	2023	2024	2025	2026	2027	2032	CAGR (%)
Anchored or Moored Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Basic Automatic Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manual or Tug-Assisted Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Seabed-Supported Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 273. European Union Cable Laying Vessel Market Size, by Onboard Power Architecture, 2017-2032 (USD Thousand)

Onboard Power Architecture	2023	2024	2025	2026	2027	2032	CAGR (%)
All-Electric Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Conventional Engine-Based Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Electric Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 274. European Union Cable Laying Vessel Market Size, by Infrastructure Application, 2017-2032 (USD Thousand)

Infrastructure Application	2023	2024	2025	2026	2027	2032	CAGR (%)
Defense and Security Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Industrial Infrastructure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Infrastructure Portfolios	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Offshore Renewable Energy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Power Transmission and Distribution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scientific and Environmental Monitoring	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Telecommunications Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 275. European Union Cable Laying Vessel Market Size, by Vessel Buyer, 2017-2032 (USD Thousand)

Vessel Buyer	2023	2024	2025	2026	2027	2032	CAGR (%)
Captive Infrastructure and Public-Service Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Cable-System Suppliers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Marine Installation and Maintenance Contractors	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Vessel Owners and Leasing Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 276. European Union Cable Laying Vessel Market Size, by Construction Pathway, 2017-2032 (USD Thousand)

Construction Pathway	2023	2024	2025	2026	2027	2032	CAGR (%)
Conversions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Newbuilds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 277. European Union Cable Laying Vessel Market Size, by Operating Envelope, 2017-2032 (USD Thousand)

Operating Envelope	2023	2024	2025	2026	2027	2032	CAGR (%)
Restricted Seagoing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sheltered and Inland Waters	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unrestricted Seagoing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 278. European Union Cable Laying Vessel Market Size, by Procurement Structure, 2017-2032 (USD Thousand)

Procurement Structure	2023	2024	2025	2026	2027	2032	CAGR (%)
Buyer-Managed Package Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Prime Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 279. European Union Cable Laying Vessel Market Size, by Cable Payload Capacity, 2017-2032 (USD Thousand)

Cable Payload Capacity	2023	2024	2025	2026	2027	2032	CAGR (%)
High Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Medium Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-High Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 280. European Union Cable Laying Vessel Market Size, by Cable-Laying Depth Capability, 2017-2032 (USD Thousand)

Cable-Laying Depth Capability	2023	2024	2025	2026	2027	2032	CAGR (%)
Deepwater Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intermediate-Depth Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Shallow-Water Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-Deepwater Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

20.3. G7

Table 281. G7 Cable Laying Vessel Market, by Country growth contribution, 2025-2032

Category	2025 value (USD Thousand)	2032 value (USD Thousand)	Added value (USD Thousand)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 282. G7 Cable Laying Vessel Market Size, by Group, 2017-2032 (USD Thousand)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 283. G7 Cable Laying Vessel Market Size, by Vessel Platform, 2017-2032 (USD Thousand)

Vessel Platform	2023	2024	2025	2026	2027	2032	CAGR (%)
Barges	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ships	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 284. G7 Cable Laying Vessel Market Size, by Mission Configuration, 2017-2032 (USD Thousand)

Mission Configuration	2023	2024	2025	2026	2027	2032	CAGR (%)
Combined Installation and Repair Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Installation-Focused Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multipurpose Construction Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Repair-Focused Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 285. G7 Cable Laying Vessel Market Size, by Cable Compatibility, 2017-2032 (USD Thousand)

Cable Compatibility	2023	2024	2025	2026	2027	2032	CAGR (%)
Communications Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multiple Cable Families	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Power Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sensing Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 286. G7 Cable Laying Vessel Market Size, by Station-Keeping System, 2017-2032 (USD Thousand)

Station-Keeping System	2023	2024	2025	2026	2027	2032	CAGR (%)
Anchored or Moored Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Basic Automatic Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manual or Tug-Assisted Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Seabed-Supported Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 287. G7 Cable Laying Vessel Market Size, by Onboard Power Architecture, 2017-2032 (USD Thousand)

Onboard Power Architecture	2023	2024	2025	2026	2027	2032	CAGR (%)
All-Electric Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Conventional Engine-Based Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Electric Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 288. G7 Cable Laying Vessel Market Size, by Infrastructure Application, 2017-2032 (USD Thousand)

Infrastructure Application	2023	2024	2025	2026	2027	2032	CAGR (%)
Defense and Security Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Industrial Infrastructure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Infrastructure Portfolios	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Offshore Renewable Energy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Power Transmission and Distribution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scientific and Environmental Monitoring	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Telecommunications Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 289. G7 Cable Laying Vessel Market Size, by Vessel Buyer, 2017-2032 (USD Thousand)

Vessel Buyer	2023	2024	2025	2026	2027	2032	CAGR (%)
Captive Infrastructure and Public-Service Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Cable-System Suppliers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Marine Installation and Maintenance Contractors	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Vessel Owners and Leasing Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 290. G7 Cable Laying Vessel Market Size, by Construction Pathway, 2017-2032 (USD Thousand)

Construction Pathway	2023	2024	2025	2026	2027	2032	CAGR (%)
Conversions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Newbuilds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 291. G7 Cable Laying Vessel Market Size, by Operating Envelope, 2017-2032 (USD Thousand)

Operating Envelope	2023	2024	2025	2026	2027	2032	CAGR (%)
Restricted Seagoing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sheltered and Inland Waters	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unrestricted Seagoing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 292. G7 Cable Laying Vessel Market Size, by Procurement Structure, 2017-2032 (USD Thousand)

Procurement Structure	2023	2024	2025	2026	2027	2032	CAGR (%)
Buyer-Managed Package Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Prime Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 293. G7 Cable Laying Vessel Market Size, by Cable Payload Capacity, 2017-2032 (USD Thousand)

Cable Payload Capacity	2023	2024	2025	2026	2027	2032	CAGR (%)
High Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Medium Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-High Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 294. G7 Cable Laying Vessel Market Size, by Cable-Laying Depth Capability, 2017-2032 (USD Thousand)

Cable-Laying Depth Capability	2023	2024	2025	2026	2027	2032	CAGR (%)
Deepwater Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intermediate-Depth Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Shallow-Water Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-Deepwater Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

20.4. BRICS

Table 295. BRICS Cable Laying Vessel Market, by Country growth contribution, 2025-2032

Category	2025 value (USD Thousand)	2032 value (USD Thousand)	Added value (USD Thousand)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 296. BRICS Cable Laying Vessel Market Size, by Group, 2017-2032 (USD Thousand)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 297. BRICS Cable Laying Vessel Market Size, by Vessel Platform, 2017-2032 (USD Thousand)

Vessel Platform	2023	2024	2025	2026	2027	2032	CAGR (%)
Barges	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ships	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 298. BRICS Cable Laying Vessel Market Size, by Mission Configuration, 2017-2032 (USD Thousand)

Mission Configuration	2023	2024	2025	2026	2027	2032	CAGR (%)
Combined Installation and Repair Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Installation-Focused Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multipurpose Construction Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Repair-Focused Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 299. BRICS Cable Laying Vessel Market Size, by Cable Compatibility, 2017-2032 (USD Thousand)

Cable Compatibility	2023	2024	2025	2026	2027	2032	CAGR (%)
Communications Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multiple Cable Families	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Power Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sensing Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 300. BRICS Cable Laying Vessel Market Size, by Station-Keeping System, 2017-2032 (USD Thousand)

Station-Keeping System	2023	2024	2025	2026	2027	2032	CAGR (%)
Anchored or Moored Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Basic Automatic Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manual or Tug-Assisted Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Seabed-Supported Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 301. BRICS Cable Laying Vessel Market Size, by Onboard Power Architecture, 2017-2032 (USD Thousand)

Onboard Power Architecture	2023	2024	2025	2026	2027	2032	CAGR (%)
All-Electric Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Conventional Engine-Based Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Electric Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 302. BRICS Cable Laying Vessel Market Size, by Infrastructure Application, 2017-2032 (USD Thousand)

Infrastructure Application	2023	2024	2025	2026	2027	2032	CAGR (%)
Defense and Security Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Industrial Infrastructure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Infrastructure Portfolios	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Offshore Renewable Energy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Power Transmission and Distribution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scientific and Environmental Monitoring	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Telecommunications Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 303. BRICS Cable Laying Vessel Market Size, by Vessel Buyer, 2017-2032 (USD Thousand)

Vessel Buyer	2023	2024	2025	2026	2027	2032	CAGR (%)
Captive Infrastructure and Public-Service Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Cable-System Suppliers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Marine Installation and Maintenance Contractors	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Vessel Owners and Leasing Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 304. BRICS Cable Laying Vessel Market Size, by Construction Pathway, 2017-2032 (USD Thousand)

Construction Pathway	2023	2024	2025	2026	2027	2032	CAGR (%)
Conversions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Newbuilds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 305. BRICS Cable Laying Vessel Market Size, by Operating Envelope, 2017-2032 (USD Thousand)

Operating Envelope	2023	2024	2025	2026	2027	2032	CAGR (%)
Restricted Seagoing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sheltered and Inland Waters	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unrestricted Seagoing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 306. BRICS Cable Laying Vessel Market Size, by Procurement Structure, 2017-2032 (USD Thousand)

Procurement Structure	2023	2024	2025	2026	2027	2032	CAGR (%)
Buyer-Managed Package Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Prime Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 307. BRICS Cable Laying Vessel Market Size, by Cable Payload Capacity, 2017-2032 (USD Thousand)

Cable Payload Capacity	2023	2024	2025	2026	2027	2032	CAGR (%)
High Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Medium Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-High Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 308. BRICS Cable Laying Vessel Market Size, by Cable-Laying Depth Capability, 2017-2032 (USD Thousand)

Cable-Laying Depth Capability	2023	2024	2025	2026	2027	2032	CAGR (%)
Deepwater Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intermediate-Depth Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Shallow-Water Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-Deepwater Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

20.5. ASEAN

Table 309. ASEAN Cable Laying Vessel Market, by Country growth contribution, 2025-2032

Category	2025 value (USD Thousand)	2032 value (USD Thousand)	Added value (USD Thousand)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Brunei	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Cambodia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Indonesia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Lao People's Democratic Republic	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Malaysia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Myanmar	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Philippines	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Singapore	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Thailand	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Vietnam	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 310. ASEAN Cable Laying Vessel Market Size, by Group, 2017-2032 (USD Thousand)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
Brunei	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Cambodia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Indonesia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Lao People's Democratic Republic	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Malaysia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Myanmar	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Philippines	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Singapore	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Thailand	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Vietnam	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 311. ASEAN Cable Laying Vessel Market Size, by Vessel Platform, 2017-2032 (USD Thousand)

Vessel Platform	2023	2024	2025	2026	2027	2032	CAGR (%)
Barges	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ships	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 312. ASEAN Cable Laying Vessel Market Size, by Mission Configuration, 2017-2032 (USD Thousand)

Mission Configuration	2023	2024	2025	2026	2027	2032	CAGR (%)
Combined Installation and Repair Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Installation-Focused Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multipurpose Construction Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Repair-Focused Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 313. ASEAN Cable Laying Vessel Market Size, by Cable Compatibility, 2017-2032 (USD Thousand)

Cable Compatibility	2023	2024	2025	2026	2027	2032	CAGR (%)
Communications Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multiple Cable Families	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Power Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sensing Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 314. ASEAN Cable Laying Vessel Market Size, by Station-Keeping System, 2017-2032 (USD Thousand)

Station-Keeping System	2023	2024	2025	2026	2027	2032	CAGR (%)
Anchored or Moored Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Basic Automatic Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manual or Tug-Assisted Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Seabed-Supported Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 315. ASEAN Cable Laying Vessel Market Size, by Onboard Power Architecture, 2017-2032 (USD Thousand)

Onboard Power Architecture	2023	2024	2025	2026	2027	2032	CAGR (%)
All-Electric Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Conventional Engine-Based Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Electric Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 316. ASEAN Cable Laying Vessel Market Size, by Infrastructure Application, 2017-2032 (USD Thousand)

Infrastructure Application	2023	2024	2025	2026	2027	2032	CAGR (%)
Defense and Security Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Industrial Infrastructure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Infrastructure Portfolios	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Offshore Renewable Energy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Power Transmission and Distribution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scientific and Environmental Monitoring	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Telecommunications Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 317. ASEAN Cable Laying Vessel Market Size, by Vessel Buyer, 2017-2032 (USD Thousand)

Vessel Buyer	2023	2024	2025	2026	2027	2032	CAGR (%)
Captive Infrastructure and Public-Service Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Cable-System Suppliers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Marine Installation and Maintenance Contractors	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Vessel Owners and Leasing Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 318. ASEAN Cable Laying Vessel Market Size, by Construction Pathway, 2017-2032 (USD Thousand)

Construction Pathway	2023	2024	2025	2026	2027	2032	CAGR (%)
Conversions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Newbuilds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 319. ASEAN Cable Laying Vessel Market Size, by Operating Envelope, 2017-2032 (USD Thousand)

Operating Envelope	2023	2024	2025	2026	2027	2032	CAGR (%)
Restricted Seagoing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sheltered and Inland Waters	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unrestricted Seagoing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 320. ASEAN Cable Laying Vessel Market Size, by Procurement Structure, 2017-2032 (USD Thousand)

Procurement Structure	2023	2024	2025	2026	2027	2032	CAGR (%)
Buyer-Managed Package Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Prime Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 321. ASEAN Cable Laying Vessel Market Size, by Cable Payload Capacity, 2017-2032 (USD Thousand)

Cable Payload Capacity	2023	2024	2025	2026	2027	2032	CAGR (%)
High Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Medium Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-High Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 322. ASEAN Cable Laying Vessel Market Size, by Cable-Laying Depth Capability, 2017-2032 (USD Thousand)

Cable-Laying Depth Capability	2023	2024	2025	2026	2027	2032	CAGR (%)
Deepwater Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intermediate-Depth Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Shallow-Water Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-Deepwater Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

20.6. GCC

Table 323. GCC Cable Laying Vessel Market, by Country growth contribution, 2025-2032

Category	2025 value (USD Thousand)	2032 value (USD Thousand)	Added value (USD Thousand)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Bahrain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Kuwait	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oman	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Qatar	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Saudi Arabia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Arab Emirates	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 324. GCC Cable Laying Vessel Market Size, by Group, 2017-2032 (USD Thousand)

Group	2023	2024	2025	2026	2027	2032	CAGR (%)
Bahrain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Kuwait	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oman	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Qatar	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Saudi Arabia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Arab Emirates	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 325. GCC Cable Laying Vessel Market Size, by Vessel Platform, 2017-2032 (USD Thousand)

Vessel Platform	2023	2024	2025	2026	2027	2032	CAGR (%)
Barges	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ships	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 326. GCC Cable Laying Vessel Market Size, by Mission Configuration, 2017-2032 (USD Thousand)

Mission Configuration	2023	2024	2025	2026	2027	2032	CAGR (%)
Combined Installation and Repair Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Installation-Focused Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multipurpose Construction Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Repair-Focused Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 327. GCC Cable Laying Vessel Market Size, by Cable Compatibility, 2017-2032 (USD Thousand)

Cable Compatibility	2023	2024	2025	2026	2027	2032	CAGR (%)
Communications Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multiple Cable Families	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Power Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sensing Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 328. GCC Cable Laying Vessel Market Size, by Station-Keeping System, 2017-2032 (USD Thousand)

Station-Keeping System	2023	2024	2025	2026	2027	2032	CAGR (%)
Anchored or Moored Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Basic Automatic Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manual or Tug-Assisted Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Seabed-Supported Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 329. GCC Cable Laying Vessel Market Size, by Onboard Power Architecture, 2017-2032 (USD Thousand)

Onboard Power Architecture	2023	2024	2025	2026	2027	2032	CAGR (%)
All-Electric Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Conventional Engine-Based Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Electric Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 330. GCC Cable Laying Vessel Market Size, by Infrastructure Application, 2017-2032 (USD Thousand)

Infrastructure Application	2023	2024	2025	2026	2027	2032	CAGR (%)
Defense and Security Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Industrial Infrastructure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Infrastructure Portfolios	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Offshore Renewable Energy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Power Transmission and Distribution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scientific and Environmental Monitoring	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Telecommunications Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 331. GCC Cable Laying Vessel Market Size, by Vessel Buyer, 2017-2032 (USD Thousand)

Vessel Buyer	2023	2024	2025	2026	2027	2032	CAGR (%)
Captive Infrastructure and Public-Service Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Cable-System Suppliers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Marine Installation and Maintenance Contractors	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Vessel Owners and Leasing Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 332. GCC Cable Laying Vessel Market Size, by Construction Pathway, 2017-2032 (USD Thousand)

Construction Pathway	2023	2024	2025	2026	2027	2032	CAGR (%)
Conversions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Newbuilds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 333. GCC Cable Laying Vessel Market Size, by Operating Envelope, 2017-2032 (USD Thousand)

Operating Envelope	2023	2024	2025	2026	2027	2032	CAGR (%)
Restricted Seagoing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sheltered and Inland Waters	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unrestricted Seagoing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 334. GCC Cable Laying Vessel Market Size, by Procurement Structure, 2017-2032 (USD Thousand)

Procurement Structure	2023	2024	2025	2026	2027	2032	CAGR (%)
Buyer-Managed Package Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Prime Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 335. GCC Cable Laying Vessel Market Size, by Cable Payload Capacity, 2017-2032 (USD Thousand)

Cable Payload Capacity	2023	2024	2025	2026	2027	2032	CAGR (%)
High Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Medium Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-High Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 336. GCC Cable Laying Vessel Market Size, by Cable-Laying Depth Capability, 2017-2032 (USD Thousand)

Cable-Laying Depth Capability	2023	2024	2025	2026	2027	2032	CAGR (%)
Deepwater Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intermediate-Depth Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Shallow-Water Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-Deepwater Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

21. Cable Laying Vessel Market, by Country

[redacted] Canada's guidance explicitly requires a coasting trade licence for foreign-registered cable-laying vessels working in Canadian waters, while Canadian-registered, duty-paid vessels do not require that licence. Owners should compare an appropriately qualified domestic asset with a licensable foreign-vessel arrangement, not assume that geographic proximity makes either route immediately available.

United Kingdom permission depends on the activity package and location. [redacted] An international-cable exemption should not be extended to every associated activity or offshore power assignment.

[redacted] Owners should confirm the decision's application to the proposed mission and identify the authorized contracting party before promising readiness. Chartering preserves asset choice but retains an authorization dependency; membership in a regional maintenance arrangement does not itself discharge that requirement.

Singapore distinguishes system deployment from repair-vessel preparedness. [redacted] An alternative vessel may preserve availability, but its acceptance and clearance cannot simply be inherited from another asset.

[redacted] Buyers should use jurisdiction-appropriate authorization milestones rather than seek a common Australasian permit model. Neither framework establishes unrestricted vessel eligibility for every coastal or associated assignment.

Figure 44. Global Cable Laying Vessel Market Size, by Country, 2025 vs 2032 (%)

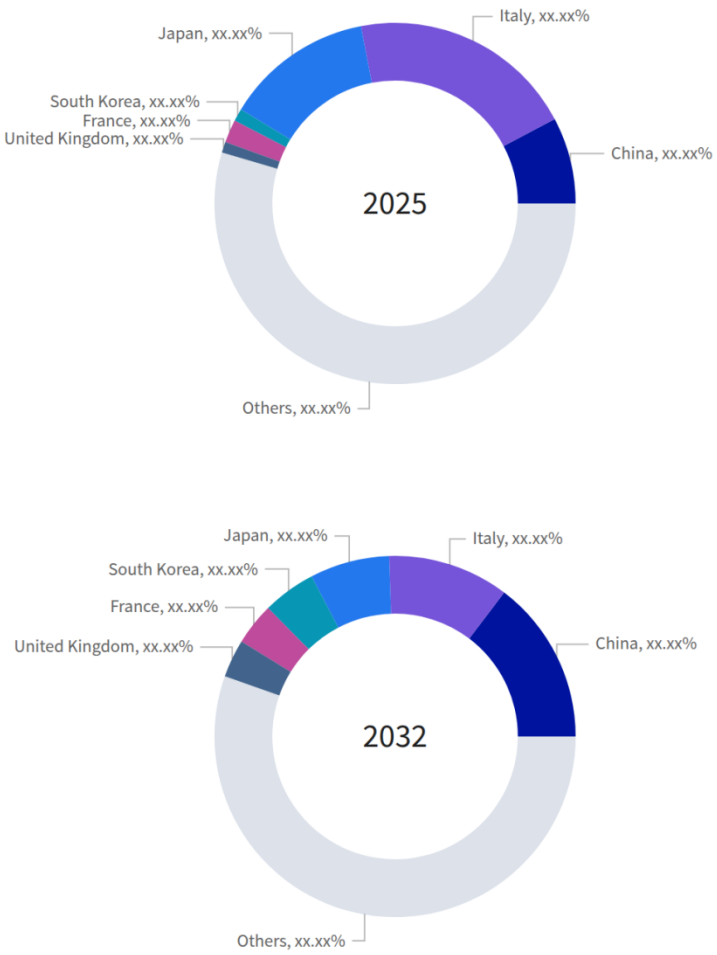

Figure 45. Global Cable Laying Vessel Market Size, by Country, 2025 vs 2026 vs 2032

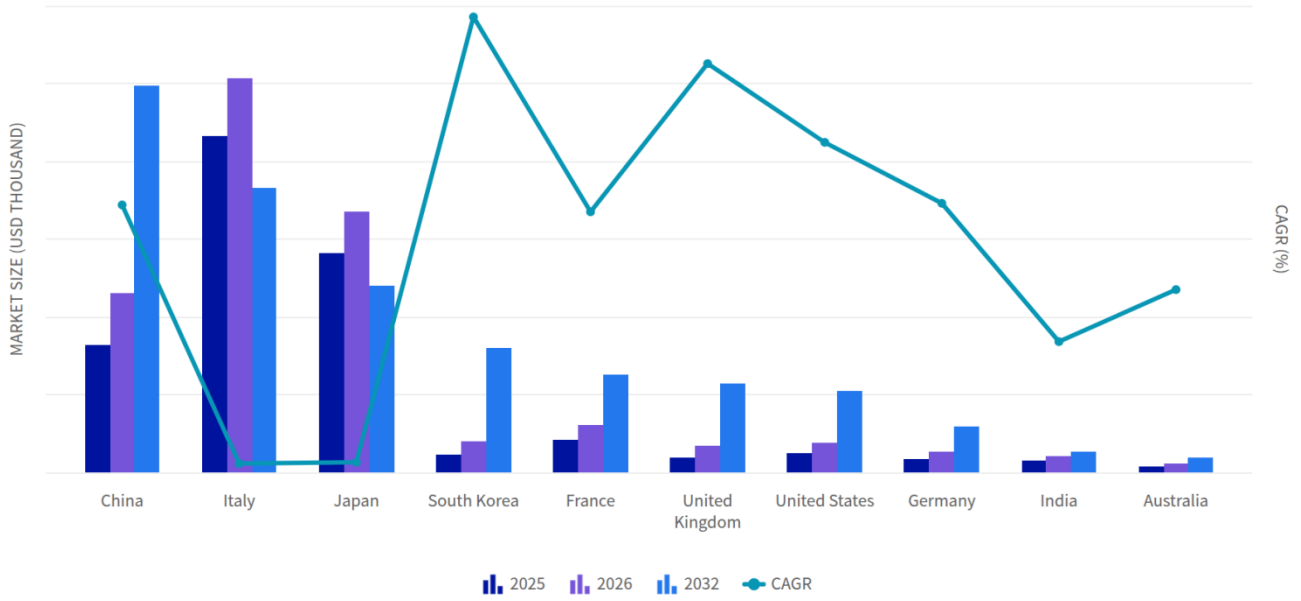

Figure 46. Global Cable Laying Vessel Market, Forecast growth by country, 2025-2032 (CAGR %)

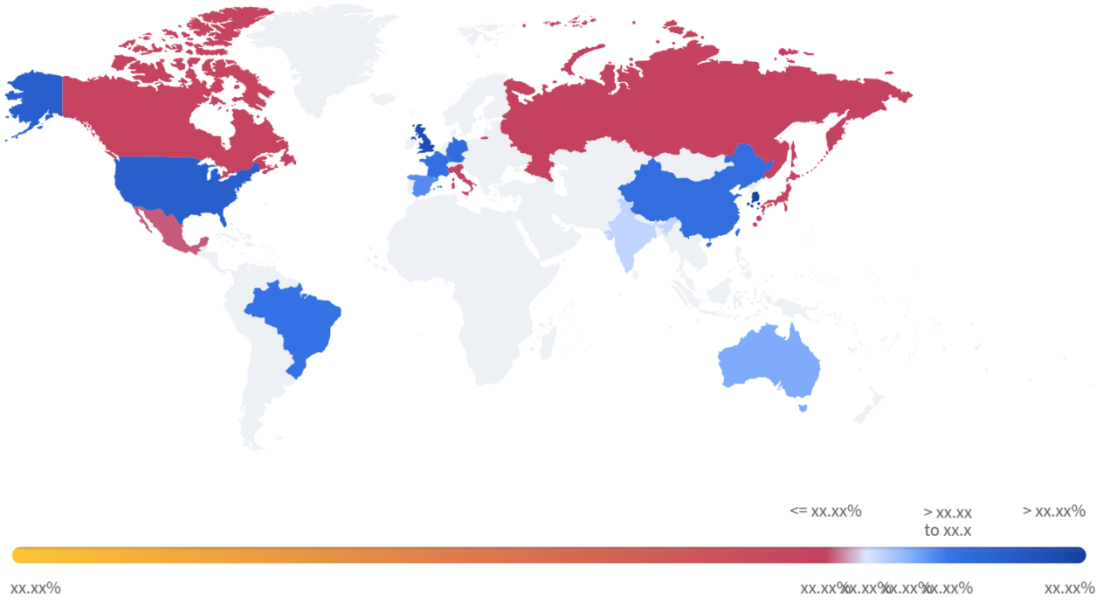

Table 337. Global Cable Laying Vessel Market, by Country growth contribution, 2025-2032

Category	2025 value (USD Thousand)	2032 value (USD Thousand)	Added value (USD Thousand)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unallocated / remaining scope	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 338. Global Cable Laying Vessel Market Size, by Country, 2017-2032 (USD Thousand)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Apply to lay cables

   · MMO distinguishes territorial cable laying, international cables outside territorial waters, associated works, and specified offshore or continental-shelf activities. These distinctions support activity-specific employment conditions. ([gov.uk](https://www.gov.uk/guidance/marine-licensing-cables))

2. Cable Security Fleet Program

   · Emergency availability accompanies participating vessels' commercial operation; unrestricted employment is therefore not established by participation alone. ([fpi.omb.gov](https://fpi.omb.gov/program/xx.xx.html))

3. Guidance library: Coasting trade activities

   · The guidance distinguishes foreign-registered cable-laying vessels requiring a licence from Canadian-registered, duty-paid vessels that do not require that licence. ([tc.canada.ca](https://tc.canada.ca/en/marine-transportation/vessel-licensing-registration/coasting-trade/coasting-trade-canada/guidance-library-coasting-trade-activities))

4. Guidelines on Deployment of Submarine Cables into Singapore

   · Cable-system deployment includes licensing and marine approval responsibilities distinct from repair-vessel preparedness. ([imda.gov.sg](https://www.imda.gov.sg/-/media/Imda/Files/Regulation-Licensing-and-Consultations/Codes-of-Practice-and-Guidelines/SubCableLanding.pdf))

5. Ementa AC-417-2023

   · The August 2023 decision required a charter-authorization certificate preceded by circularization for the cable-repair case. Application to a proposed assignment requires confirmation. ([juris.antaq.gov.br](https://juris.antaq.gov.br/index.php/2023/xx.xx/xx.xx/ementa-ac-xx.xx-2023/))

6. Guidelines on Submarine Cable Repair into Singapore
   · Singapore repair guidance advises vessel and crew pre-clearance to facilitate permitting and expressly retains agency discretion over approvals. ([imda.gov.sg](https://www.imda.gov.sg/-/media/imda/files/regulation-licensing-and-consultations/codes-of-practice-and-guidelines/subcablerepair.pdf))
7. Apply to install a submarine cable
   · Only licensed telecommunications carriers may apply for ACMA installation permits. Applicability distinguishes international and domestic cables and protection zones; coastal state and territory laws also apply. ([acma.gov.au](https://www.acma.gov.au/apply-install-submarine-cable))
8. Submarine cabling
   · New Zealand's EPA treats qualifying EEZ cable placement, removal, and maintenance as permitted activities subject to the applicable rules; placement and removal retain notification and reporting conditions. ([epa.govt.nz](https://www.epa.govt.nz/industry-areas/eez-marine-activities/undertake-an-activity-in-the-eez/submarine-cabling/))

21.1. Italy

Table 339. Italy Cable Laying Vessel Market Size, 2017-2032 (USD Thousand)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Italy	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 340. Italy Cable Laying Vessel Market Size, by Vessel Platform, 2017-2032 (USD Thousand)

Vessel Platform	2023	2024	2025	2026	2027	2032	CAGR (%)
Barges	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ships	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 341. Italy Cable Laying Vessel Market Size, by Mission Configuration, 2017-2032 (USD Thousand)

Mission Configuration	2023	2024	2025	2026	2027	2032	CAGR (%)
Combined Installation and Repair Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Installation-Focused Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multipurpose Construction Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Repair-Focused Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 342. Italy Cable Laying Vessel Market Size, by Cable Compatibility, 2017-2032 (USD Thousand)

Cable Compatibility	2023	2024	2025	2026	2027	2032	CAGR (%)
Communications Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multiple Cable Families	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Power Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sensing Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 343. Italy Cable Laying Vessel Market Size, by Station-Keeping System, 2017-2032 (USD Thousand)

Station-Keeping System	2023	2024	2025	2026	2027	2032	CAGR (%)
Anchored or Moored Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Basic Automatic Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manual or Tug-Assisted Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Seabed-Supported Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 344. Italy Cable Laying Vessel Market Size, by Onboard Power Architecture, 2017-2032 (USD Thousand)

Onboard Power Architecture	2023	2024	2025	2026	2027	2032	CAGR (%)
All-Electric Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Conventional Engine-Based Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Electric Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 345. Italy Cable Laying Vessel Market Size, by Infrastructure Application, 2017-2032 (USD Thousand)

Infrastructure Application	2023	2024	2025	2026	2027	2032	CAGR (%)
Defense and Security Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Industrial Infrastructure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Infrastructure Portfolios	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Offshore Renewable Energy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Power Transmission and Distribution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scientific and Environmental Monitoring	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Telecommunications Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 346. Italy Cable Laying Vessel Market Size, by Vessel Buyer, 2017-2032 (USD Thousand)

Vessel Buyer	2023	2024	2025	2026	2027	2032	CAGR (%)
Captive Infrastructure and Public-Service Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Cable-System Suppliers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Marine Installation and Maintenance Contractors	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Vessel Owners and Leasing Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 347. Italy Cable Laying Vessel Market Size, by Construction Pathway, 2017-2032 (USD Thousand)

Construction Pathway	2023	2024	2025	2026	2027	2032	CAGR (%)
Conversions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Newbuilds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 348. Italy Cable Laying Vessel Market Size, by Operating Envelope, 2017-2032 (USD Thousand)

Operating Envelope	2023	2024	2025	2026	2027	2032	CAGR (%)
Restricted Seagoing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sheltered and Inland Waters	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unrestricted Seagoing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 349. Italy Cable Laying Vessel Market Size, by Procurement Structure, 2017-2032 (USD Thousand)

Procurement Structure	2023	2024	2025	2026	2027	2032	CAGR (%)
Buyer-Managed Package Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Prime Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 350. Italy Cable Laying Vessel Market Size, by Cable Payload Capacity, 2017-2032 (USD Thousand)

Cable Payload Capacity	2023	2024	2025	2026	2027	2032	CAGR (%)
High Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Medium Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-High Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 351. Italy Cable Laying Vessel Market Size, by Cable-Laying Depth Capability, 2017-2032 (USD Thousand)

Cable-Laying Depth Capability	2023	2024	2025	2026	2027	2032	CAGR (%)
Deepwater Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intermediate-Depth Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Shallow-Water Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-Deepwater Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

21.2. Japan

Table 352. Japan Cable Laying Vessel Market Size, 2017-2032 (USD Thousand)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Japan	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 353. Japan Cable Laying Vessel Market Size, by Vessel Platform, 2017-2032 (USD Thousand)

Vessel Platform	2023	2024	2025	2026	2027	2032	CAGR (%)
Barges	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ships	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 354. Japan Cable Laying Vessel Market Size, by Mission Configuration, 2017-2032 (USD Thousand)

Mission Configuration	2023	2024	2025	2026	2027	2032	CAGR (%)
Combined Installation and Repair Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Installation-Focused Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multipurpose Construction Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Repair-Focused Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 355. Japan Cable Laying Vessel Market Size, by Cable Compatibility, 2017-2032 (USD Thousand)

Cable Compatibility	2023	2024	2025	2026	2027	2032	CAGR (%)
Communications Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multiple Cable Families	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Power Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sensing Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 356. Japan Cable Laying Vessel Market Size, by Station-Keeping System, 2017-2032 (USD Thousand)

Station-Keeping System	2023	2024	2025	2026	2027	2032	CAGR (%)
Anchored or Moored Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Basic Automatic Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manual or Tug-Assisted Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Seabed-Supported Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 357. Japan Cable Laying Vessel Market Size, by Onboard Power Architecture, 2017-2032 (USD Thousand)

Onboard Power Architecture	2023	2024	2025	2026	2027	2032	CAGR (%)
All-Electric Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Conventional Engine-Based Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Electric Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 358. Japan Cable Laying Vessel Market Size, by Infrastructure Application, 2017-2032 (USD Thousand)

Infrastructure Application	2023	2024	2025	2026	2027	2032	CAGR (%)
Defense and Security Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Industrial Infrastructure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Infrastructure Portfolios	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Offshore Renewable Energy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Power Transmission and Distribution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scientific and Environmental Monitoring	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Telecommunications Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 359. Japan Cable Laying Vessel Market Size, by Vessel Buyer, 2017-2032 (USD Thousand)

Vessel Buyer	2023	2024	2025	2026	2027	2032	CAGR (%)
Captive Infrastructure and Public-Service Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Cable-System Suppliers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Marine Installation and Maintenance Contractors	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Vessel Owners and Leasing Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 360. Japan Cable Laying Vessel Market Size, by Construction Pathway, 2017-2032 (USD Thousand)

Construction Pathway	2023	2024	2025	2026	2027	2032	CAGR (%)
Conversions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Newbuilds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 361. Japan Cable Laying Vessel Market Size, by Operating Envelope, 2017-2032 (USD Thousand)

Operating Envelope	2023	2024	2025	2026	2027	2032	CAGR (%)
Restricted Seagoing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sheltered and Inland Waters	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unrestricted Seagoing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 362. Japan Cable Laying Vessel Market Size, by Procurement Structure, 2017-2032 (USD Thousand)

Procurement Structure	2023	2024	2025	2026	2027	2032	CAGR (%)
Buyer-Managed Package Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Prime Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 363. Japan Cable Laying Vessel Market Size, by Cable Payload Capacity, 2017-2032 (USD Thousand)

Cable Payload Capacity	2023	2024	2025	2026	2027	2032	CAGR (%)
High Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Medium Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-High Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 364. Japan Cable Laying Vessel Market Size, by Cable-Laying Depth Capability, 2017-2032 (USD Thousand)

Cable-Laying Depth Capability	2023	2024	2025	2026	2027	2032	CAGR (%)
Deepwater Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intermediate-Depth Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Shallow-Water Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-Deepwater Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

21.3. China

Table 365. China Cable Laying Vessel Market Size, 2017-2032 (USD Thousand)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
China	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 366. China Cable Laying Vessel Market Size, by Vessel Platform, 2017-2032 (USD Thousand)

Vessel Platform	2023	2024	2025	2026	2027	2032	CAGR (%)
Barges	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ships	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 367. China Cable Laying Vessel Market Size, by Mission Configuration, 2017-2032 (USD Thousand)

Mission Configuration	2023	2024	2025	2026	2027	2032	CAGR (%)
Combined Installation and Repair Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Installation-Focused Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multipurpose Construction Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Repair-Focused Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 368. China Cable Laying Vessel Market Size, by Cable Compatibility, 2017-2032 (USD Thousand)

Cable Compatibility	2023	2024	2025	2026	2027	2032	CAGR (%)
Communications Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multiple Cable Families	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Power Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sensing Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 369. China Cable Laying Vessel Market Size, by Station-Keeping System, 2017-2032 (USD Thousand)

Station-Keeping System	2023	2024	2025	2026	2027	2032	CAGR (%)
Anchored or Moored Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Basic Automatic Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manual or Tug-Assisted Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Seabed-Supported Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 370. China Cable Laying Vessel Market Size, by Onboard Power Architecture, 2017-2032 (USD Thousand)

Onboard Power Architecture	2023	2024	2025	2026	2027	2032	CAGR (%)
All-Electric Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Conventional Engine-Based Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Electric Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 371. China Cable Laying Vessel Market Size, by Infrastructure Application, 2017-2032 (USD Thousand)

Infrastructure Application	2023	2024	2025	2026	2027	2032	CAGR (%)
Defense and Security Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Industrial Infrastructure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Infrastructure Portfolios	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Offshore Renewable Energy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Power Transmission and Distribution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scientific and Environmental Monitoring	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Telecommunications Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 372. China Cable Laying Vessel Market Size, by Vessel Buyer, 2017-2032 (USD Thousand)

Vessel Buyer	2023	2024	2025	2026	2027	2032	CAGR (%)
Captive Infrastructure and Public-Service Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Cable-System Suppliers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Marine Installation and Maintenance Contractors	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Vessel Owners and Leasing Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 373. China Cable Laying Vessel Market Size, by Construction Pathway, 2017-2032 (USD Thousand)

Construction Pathway	2023	2024	2025	2026	2027	2032	CAGR (%)
Conversions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Newbuilds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 374. China Cable Laying Vessel Market Size, by Operating Envelope, 2017-2032 (USD Thousand)

Operating Envelope	2023	2024	2025	2026	2027	2032	CAGR (%)
Restricted Seagoing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sheltered and Inland Waters	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unrestricted Seagoing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 375. China Cable Laying Vessel Market Size, by Procurement Structure, 2017-2032 (USD Thousand)

Procurement Structure	2023	2024	2025	2026	2027	2032	CAGR (%)
Buyer-Managed Package Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Prime Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 376. China Cable Laying Vessel Market Size, by Cable Payload Capacity, 2017-2032 (USD Thousand)

Cable Payload Capacity	2023	2024	2025	2026	2027	2032	CAGR (%)
High Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Medium Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-High Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 377. China Cable Laying Vessel Market Size, by Cable-Laying Depth Capability, 2017-2032 (USD Thousand)

Cable-Laying Depth Capability	2023	2024	2025	2026	2027	2032	CAGR (%)
Deepwater Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intermediate-Depth Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Shallow-Water Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-Deepwater Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

21.4. France

Table 378. France Cable Laying Vessel Market Size, 2017-2032 (USD Thousand)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
France	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 379. France Cable Laying Vessel Market Size, by Vessel Platform, 2017-2032 (USD Thousand)

Vessel Platform	2023	2024	2025	2026	2027	2032	CAGR (%)
Barges	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ships	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 380. France Cable Laying Vessel Market Size, by Mission Configuration, 2017-2032 (USD Thousand)

Mission Configuration	2023	2024	2025	2026	2027	2032	CAGR (%)
Combined Installation and Repair Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Installation-Focused Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multipurpose Construction Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Repair-Focused Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 381. France Cable Laying Vessel Market Size, by Cable Compatibility, 2017-2032 (USD Thousand)

Cable Compatibility	2023	2024	2025	2026	2027	2032	CAGR (%)
Communications Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multiple Cable Families	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Power Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sensing Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 382. France Cable Laying Vessel Market Size, by Station-Keeping System, 2017-2032 (USD Thousand)

Station-Keeping System	2023	2024	2025	2026	2027	2032	CAGR (%)
Anchored or Moored Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Basic Automatic Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manual or Tug-Assisted Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Seabed-Supported Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 383. France Cable Laying Vessel Market Size, by Onboard Power Architecture, 2017-2032 (USD Thousand)

Onboard Power Architecture	2023	2024	2025	2026	2027	2032	CAGR (%)
All-Electric Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Conventional Engine-Based Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Electric Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 384. France Cable Laying Vessel Market Size, by Infrastructure Application, 2017-2032 (USD Thousand)

Infrastructure Application	2023	2024	2025	2026	2027	2032	CAGR (%)
Defense and Security Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Industrial Infrastructure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Infrastructure Portfolios	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Offshore Renewable Energy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Power Transmission and Distribution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scientific and Environmental Monitoring	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Telecommunications Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 385. France Cable Laying Vessel Market Size, by Vessel Buyer, 2017-2032 (USD Thousand)

Vessel Buyer	2023	2024	2025	2026	2027	2032	CAGR (%)
Captive Infrastructure and Public-Service Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Cable-System Suppliers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Marine Installation and Maintenance Contractors	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Vessel Owners and Leasing Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 386. France Cable Laying Vessel Market Size, by Construction Pathway, 2017-2032 (USD Thousand)

Construction Pathway	2023	2024	2025	2026	2027	2032	CAGR (%)
Conversions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Newbuilds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 387. France Cable Laying Vessel Market Size, by Operating Envelope, 2017-2032 (USD Thousand)

Operating Envelope	2023	2024	2025	2026	2027	2032	CAGR (%)
Restricted Seagoing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sheltered and Inland Waters	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unrestricted Seagoing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 388. France Cable Laying Vessel Market Size, by Procurement Structure, 2017-2032 (USD Thousand)

Procurement Structure	2023	2024	2025	2026	2027	2032	CAGR (%)
Buyer-Managed Package Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Prime Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 389. France Cable Laying Vessel Market Size, by Cable Payload Capacity, 2017-2032 (USD Thousand)

Cable Payload Capacity	2023	2024	2025	2026	2027	2032	CAGR (%)
High Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Medium Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-High Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 390. France Cable Laying Vessel Market Size, by Cable-Laying Depth Capability, 2017-2032 (USD Thousand)

Cable-Laying Depth Capability	2023	2024	2025	2026	2027	2032	CAGR (%)
Deepwater Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intermediate-Depth Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Shallow-Water Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-Deepwater Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

21.5. United States

Table 391. United States Cable Laying Vessel Market Size, 2017-2032 (USD Thousand)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
United States	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 392. United States Cable Laying Vessel Market Size, by Vessel Platform, 2017-2032 (USD Thousand)

Vessel Platform	2023	2024	2025	2026	2027	2032	CAGR (%)
Barges	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ships	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 393. United States Cable Laying Vessel Market Size, by Mission Configuration, 2017-2032 (USD Thousand)

Mission Configuration	2023	2024	2025	2026	2027	2032	CAGR (%)
Combined Installation and Repair Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Installation-Focused Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multipurpose Construction Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Repair-Focused Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 394. United States Cable Laying Vessel Market Size, by Cable Compatibility, 2017-2032 (USD Thousand)

Cable Compatibility	2023	2024	2025	2026	2027	2032	CAGR (%)
Communications Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multiple Cable Families	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Power Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sensing Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 395. United States Cable Laying Vessel Market Size, by Station-Keeping System, 2017-2032 (USD Thousand)

Station-Keeping System	2023	2024	2025	2026	2027	2032	CAGR (%)
Anchored or Moored Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Basic Automatic Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manual or Tug-Assisted Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Seabed-Supported Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 396. United States Cable Laying Vessel Market Size, by Onboard Power Architecture, 2017-2032 (USD Thousand)

Onboard Power Architecture	2023	2024	2025	2026	2027	2032	CAGR (%)
All-Electric Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Conventional Engine-Based Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Electric Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 397. United States Cable Laying Vessel Market Size, by Infrastructure Application, 2017-2032 (USD Thousand)

Infrastructure Application	2023	2024	2025	2026	2027	2032	CAGR (%)
Defense and Security Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Industrial Infrastructure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Infrastructure Portfolios	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Offshore Renewable Energy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Power Transmission and Distribution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scientific and Environmental Monitoring	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Telecommunications Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 398. United States Cable Laying Vessel Market Size, by Vessel Buyer, 2017-2032 (USD Thousand)

Vessel Buyer	2023	2024	2025	2026	2027	2032	CAGR (%)
Captive Infrastructure and Public-Service Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Cable-System Suppliers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Marine Installation and Maintenance Contractors	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Vessel Owners and Leasing Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 399. United States Cable Laying Vessel Market Size, by Construction Pathway, 2017-2032 (USD Thousand)

Construction Pathway	2023	2024	2025	2026	2027	2032	CAGR (%)
Conversions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Newbuilds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 400. United States Cable Laying Vessel Market Size, by Operating Envelope, 2017-2032 (USD Thousand)

Operating Envelope	2023	2024	2025	2026	2027	2032	CAGR (%)
Restricted Seagoing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sheltered and Inland Waters	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unrestricted Seagoing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 401. United States Cable Laying Vessel Market Size, by Procurement Structure, 2017-2032 (USD Thousand)

Procurement Structure	2023	2024	2025	2026	2027	2032	CAGR (%)
Buyer-Managed Package Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Prime Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 402. United States Cable Laying Vessel Market Size, by Cable Payload Capacity, 2017-2032 (USD Thousand)

Cable Payload Capacity	2023	2024	2025	2026	2027	2032	CAGR (%)
High Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Medium Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-High Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 403. United States Cable Laying Vessel Market Size, by Cable-Laying Depth Capability, 2017-2032 (USD Thousand)

Cable-Laying Depth Capability	2023	2024	2025	2026	2027	2032	CAGR (%)
Deepwater Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intermediate-Depth Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Shallow-Water Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-Deepwater Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

21.6. South Korea

Table 404. South Korea Cable Laying Vessel Market Size, 2017-2032 (USD Thousand)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
South Korea	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 405. South Korea Cable Laying Vessel Market Size, by Vessel Platform, 2017-2032 (USD Thousand)

Vessel Platform	2023	2024	2025	2026	2027	2032	CAGR (%)
Barges	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ships	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 406. South Korea Cable Laying Vessel Market Size, by Mission Configuration, 2017-2032 (USD Thousand)

Mission Configuration	2023	2024	2025	2026	2027	2032	CAGR (%)
Combined Installation and Repair Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Installation-Focused Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multipurpose Construction Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Repair-Focused Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 407. South Korea Cable Laying Vessel Market Size, by Cable Compatibility, 2017-2032 (USD Thousand)

Cable Compatibility	2023	2024	2025	2026	2027	2032	CAGR (%)
Communications Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multiple Cable Families	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Power Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sensing Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 408. South Korea Cable Laying Vessel Market Size, by Station-Keeping System, 2017-2032 (USD Thousand)

Station-Keeping System	2023	2024	2025	2026	2027	2032	CAGR (%)
Anchored or Moored Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Basic Automatic Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manual or Tug-Assisted Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Seabed-Supported Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 409. South Korea Cable Laying Vessel Market Size, by Onboard Power Architecture, 2017-2032 (USD Thousand)

Onboard Power Architecture	2023	2024	2025	2026	2027	2032	CAGR (%)
All-Electric Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Conventional Engine-Based Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Electric Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 410. South Korea Cable Laying Vessel Market Size, by Infrastructure Application, 2017-2032 (USD Thousand)

Infrastructure Application	2023	2024	2025	2026	2027	2032	CAGR (%)
Defense and Security Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Industrial Infrastructure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Infrastructure Portfolios	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Offshore Renewable Energy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Power Transmission and Distribution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scientific and Environmental Monitoring	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Telecommunications Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 411. South Korea Cable Laying Vessel Market Size, by Vessel Buyer, 2017-2032 (USD Thousand)

Vessel Buyer	2023	2024	2025	2026	2027	2032	CAGR (%)
Captive Infrastructure and Public-Service Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Cable-System Suppliers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Marine Installation and Maintenance Contractors	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Vessel Owners and Leasing Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 412. South Korea Cable Laying Vessel Market Size, by Construction Pathway, 2017-2032 (USD Thousand)

Construction Pathway	2023	2024	2025	2026	2027	2032	CAGR (%)
Conversions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Newbuilds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 413. South Korea Cable Laying Vessel Market Size, by Operating Envelope, 2017-2032 (USD Thousand)

Operating Envelope	2023	2024	2025	2026	2027	2032	CAGR (%)
Restricted Seagoing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sheltered and Inland Waters	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unrestricted Seagoing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 414. South Korea Cable Laying Vessel Market Size, by Procurement Structure, 2017-2032 (USD Thousand)

Procurement Structure	2023	2024	2025	2026	2027	2032	CAGR (%)
Buyer-Managed Package Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Prime Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 415. South Korea Cable Laying Vessel Market Size, by Cable Payload Capacity, 2017-2032 (USD Thousand)

Cable Payload Capacity	2023	2024	2025	2026	2027	2032	CAGR (%)
High Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Medium Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-High Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 416. South Korea Cable Laying Vessel Market Size, by Cable-Laying Depth Capability, 2017-2032 (USD Thousand)

Cable-Laying Depth Capability	2023	2024	2025	2026	2027	2032	CAGR (%)
Deepwater Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intermediate-Depth Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Shallow-Water Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-Deepwater Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

21.7. Canada

Table 417. Canada Cable Laying Vessel Market Size, 2017-2032 (USD Thousand)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Canada	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 418. Canada Cable Laying Vessel Market Size, by Vessel Platform, 2017-2032 (USD Thousand)

Vessel Platform	2023	2024	2025	2026	2027	2032	CAGR (%)
Barges	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ships	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 419. Canada Cable Laying Vessel Market Size, by Mission Configuration, 2017-2032 (USD Thousand)

Mission Configuration	2023	2024	2025	2026	2027	2032	CAGR (%)
Combined Installation and Repair Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Installation-Focused Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multipurpose Construction Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Repair-Focused Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 420. Canada Cable Laying Vessel Market Size, by Cable Compatibility, 2017-2032 (USD Thousand)

Cable Compatibility	2023	2024	2025	2026	2027	2032	CAGR (%)
Communications Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multiple Cable Families	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Power Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sensing Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 421. Canada Cable Laying Vessel Market Size, by Station-Keeping System, 2017-2032 (USD Thousand)

Station-Keeping System	2023	2024	2025	2026	2027	2032	CAGR (%)
Anchored or Moored Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Basic Automatic Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manual or Tug-Assisted Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Seabed-Supported Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 422. Canada Cable Laying Vessel Market Size, by Onboard Power Architecture, 2017-2032 (USD Thousand)

Onboard Power Architecture	2023	2024	2025	2026	2027	2032	CAGR (%)
All-Electric Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Conventional Engine-Based Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Electric Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 423. Canada Cable Laying Vessel Market Size, by Infrastructure Application, 2017-2032 (USD Thousand)

Infrastructure Application	2023	2024	2025	2026	2027	2032	CAGR (%)
Defense and Security Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Industrial Infrastructure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Infrastructure Portfolios	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Offshore Renewable Energy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Power Transmission and Distribution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scientific and Environmental Monitoring	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Telecommunications Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 424. Canada Cable Laying Vessel Market Size, by Vessel Buyer, 2017-2032 (USD Thousand)

Vessel Buyer	2023	2024	2025	2026	2027	2032	CAGR (%)
Captive Infrastructure and Public-Service Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Cable-System Suppliers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Marine Installation and Maintenance Contractors	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Vessel Owners and Leasing Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 425. Canada Cable Laying Vessel Market Size, by Construction Pathway, 2017-2032 (USD Thousand)

Construction Pathway	2023	2024	2025	2026	2027	2032	CAGR (%)
Conversions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Newbuilds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 426. Canada Cable Laying Vessel Market Size, by Operating Envelope, 2017-2032 (USD Thousand)

Operating Envelope	2023	2024	2025	2026	2027	2032	CAGR (%)
Restricted Seagoing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sheltered and Inland Waters	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unrestricted Seagoing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 427. Canada Cable Laying Vessel Market Size, by Procurement Structure, 2017-2032 (USD Thousand)

Procurement Structure	2023	2024	2025	2026	2027	2032	CAGR (%)
Buyer-Managed Package Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Prime Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 428. Canada Cable Laying Vessel Market Size, by Cable Payload Capacity, 2017-2032 (USD Thousand)

Cable Payload Capacity	2023	2024	2025	2026	2027	2032	CAGR (%)
High Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Medium Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-High Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 429. Canada Cable Laying Vessel Market Size, by Cable-Laying Depth Capability, 2017-2032 (USD Thousand)

Cable-Laying Depth Capability	2023	2024	2025	2026	2027	2032	CAGR (%)
Deepwater Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intermediate-Depth Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Shallow-Water Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-Deepwater Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

21.8. United Kingdom

Table 430. United Kingdom Cable Laying Vessel Market Size, 2017-2032 (USD Thousand)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
United Kingdom	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 431. United Kingdom Cable Laying Vessel Market Size, by Vessel Platform, 2017-2032 (USD Thousand)

Vessel Platform	2023	2024	2025	2026	2027	2032	CAGR (%)
Barges	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ships	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 432. United Kingdom Cable Laying Vessel Market Size, by Mission Configuration, 2017-2032 (USD Thousand)

Mission Configuration	2023	2024	2025	2026	2027	2032	CAGR (%)
Combined Installation and Repair Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Installation-Focused Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multipurpose Construction Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Repair-Focused Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 433. United Kingdom Cable Laying Vessel Market Size, by Cable Compatibility, 2017-2032 (USD Thousand)

Cable Compatibility	2023	2024	2025	2026	2027	2032	CAGR (%)
Communications Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multiple Cable Families	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Power Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sensing Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 434. United Kingdom Cable Laying Vessel Market Size, by Station-Keeping System, 2017-2032 (USD Thousand)

Station-Keeping System	2023	2024	2025	2026	2027	2032	CAGR (%)
Anchored or Moored Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Basic Automatic Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manual or Tug-Assisted Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Seabed-Supported Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 435. United Kingdom Cable Laying Vessel Market Size, by Onboard Power Architecture, 2017-2032 (USD Thousand)

Onboard Power Architecture	2023	2024	2025	2026	2027	2032	CAGR (%)
All-Electric Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Conventional Engine-Based Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Electric Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 436. United Kingdom Cable Laying Vessel Market Size, by Infrastructure Application, 2017-2032 (USD Thousand)

Infrastructure Application	2023	2024	2025	2026	2027	2032	CAGR (%)
Defense and Security Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Industrial Infrastructure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Infrastructure Portfolios	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Offshore Renewable Energy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Power Transmission and Distribution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scientific and Environmental Monitoring	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Telecommunications Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 437. United Kingdom Cable Laying Vessel Market Size, by Vessel Buyer, 2017-2032 (USD Thousand)

Vessel Buyer	2023	2024	2025	2026	2027	2032	CAGR (%)
Captive Infrastructure and Public-Service Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Cable-System Suppliers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Marine Installation and Maintenance Contractors	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Vessel Owners and Leasing Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 438. United Kingdom Cable Laying Vessel Market Size, by Construction Pathway, 2017-2032 (USD Thousand)

Construction Pathway	2023	2024	2025	2026	2027	2032	CAGR (%)
Conversions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Newbuilds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 439. United Kingdom Cable Laying Vessel Market Size, by Operating Envelope, 2017-2032 (USD Thousand)

Operating Envelope	2023	2024	2025	2026	2027	2032	CAGR (%)
Restricted Seagoing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sheltered and Inland Waters	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unrestricted Seagoing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 440. United Kingdom Cable Laying Vessel Market Size, by Procurement Structure, 2017-2032 (USD Thousand)

Procurement Structure	2023	2024	2025	2026	2027	2032	CAGR (%)
Buyer-Managed Package Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Prime Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 441. United Kingdom Cable Laying Vessel Market Size, by Cable Payload Capacity, 2017-2032 (USD Thousand)

Cable Payload Capacity	2023	2024	2025	2026	2027	2032	CAGR (%)
High Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Medium Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-High Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 442. United Kingdom Cable Laying Vessel Market Size, by Cable-Laying Depth Capability, 2017-2032 (USD Thousand)

Cable-Laying Depth Capability	2023	2024	2025	2026	2027	2032	CAGR (%)
Deepwater Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intermediate-Depth Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Shallow-Water Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-Deepwater Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

21.9. Germany

Table 443. Germany Cable Laying Vessel Market Size, 2017-2032 (USD Thousand)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Germany	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 444. Germany Cable Laying Vessel Market Size, by Vessel Platform, 2017-2032 (USD Thousand)

Vessel Platform	2023	2024	2025	2026	2027	2032	CAGR (%)
Barges	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ships	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 445. Germany Cable Laying Vessel Market Size, by Mission Configuration, 2017-2032 (USD Thousand)

Mission Configuration	2023	2024	2025	2026	2027	2032	CAGR (%)
Combined Installation and Repair Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Installation-Focused Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multipurpose Construction Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Repair-Focused Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 446. Germany Cable Laying Vessel Market Size, by Cable Compatibility, 2017-2032 (USD Thousand)

Cable Compatibility	2023	2024	2025	2026	2027	2032	CAGR (%)
Communications Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multiple Cable Families	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Power Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sensing Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 447. Germany Cable Laying Vessel Market Size, by Station-Keeping System, 2017-2032 (USD Thousand)

Station-Keeping System	2023	2024	2025	2026	2027	2032	CAGR (%)
Anchored or Moored Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Basic Automatic Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manual or Tug-Assisted Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Seabed-Supported Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 448. Germany Cable Laying Vessel Market Size, by Onboard Power Architecture, 2017-2032 (USD Thousand)

Onboard Power Architecture	2023	2024	2025	2026	2027	2032	CAGR (%)
All-Electric Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Conventional Engine-Based Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Electric Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 449. Germany Cable Laying Vessel Market Size, by Infrastructure Application, 2017-2032 (USD Thousand)

Infrastructure Application	2023	2024	2025	2026	2027	2032	CAGR (%)
Defense and Security Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Industrial Infrastructure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Infrastructure Portfolios	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Offshore Renewable Energy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Power Transmission and Distribution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scientific and Environmental Monitoring	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Telecommunications Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 450. Germany Cable Laying Vessel Market Size, by Vessel Buyer, 2017-2032 (USD Thousand)

Vessel Buyer	2023	2024	2025	2026	2027	2032	CAGR (%)
Captive Infrastructure and Public-Service Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Cable-System Suppliers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Marine Installation and Maintenance Contractors	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Vessel Owners and Leasing Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 451. Germany Cable Laying Vessel Market Size, by Construction Pathway, 2017-2032 (USD Thousand)

Construction Pathway	2023	2024	2025	2026	2027	2032	CAGR (%)
Conversions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Newbuilds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 452. Germany Cable Laying Vessel Market Size, by Operating Envelope, 2017-2032 (USD Thousand)

Operating Envelope	2023	2024	2025	2026	2027	2032	CAGR (%)
Restricted Seagoing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sheltered and Inland Waters	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unrestricted Seagoing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 453. Germany Cable Laying Vessel Market Size, by Procurement Structure, 2017-2032 (USD Thousand)

Procurement Structure	2023	2024	2025	2026	2027	2032	CAGR (%)
Buyer-Managed Package Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Prime Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 454. Germany Cable Laying Vessel Market Size, by Cable Payload Capacity, 2017-2032 (USD Thousand)

Cable Payload Capacity	2023	2024	2025	2026	2027	2032	CAGR (%)
High Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Medium Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-High Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 455. Germany Cable Laying Vessel Market Size, by Cable-Laying Depth Capability, 2017-2032 (USD Thousand)

Cable-Laying Depth Capability	2023	2024	2025	2026	2027	2032	CAGR (%)
Deepwater Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intermediate-Depth Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Shallow-Water Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-Deepwater Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

21.10. India

Table 456. India Cable Laying Vessel Market Size, 2017-2032 (USD Thousand)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
India	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 457. India Cable Laying Vessel Market Size, by Vessel Platform, 2017-2032 (USD Thousand)

Vessel Platform	2023	2024	2025	2026	2027	2032	CAGR (%)
Barges	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ships	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 458. India Cable Laying Vessel Market Size, by Mission Configuration, 2017-2032 (USD Thousand)

Mission Configuration	2023	2024	2025	2026	2027	2032	CAGR (%)
Combined Installation and Repair Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Installation-Focused Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multipurpose Construction Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Repair-Focused Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 459. India Cable Laying Vessel Market Size, by Cable Compatibility, 2017-2032 (USD Thousand)

Cable Compatibility	2023	2024	2025	2026	2027	2032	CAGR (%)
Communications Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multiple Cable Families	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Power Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sensing Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 460. India Cable Laying Vessel Market Size, by Station-Keeping System, 2017-2032 (USD Thousand)

Station-Keeping System	2023	2024	2025	2026	2027	2032	CAGR (%)
Anchored or Moored Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Basic Automatic Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manual or Tug-Assisted Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Seabed-Supported Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 461. India Cable Laying Vessel Market Size, by Onboard Power Architecture, 2017-2032 (USD Thousand)

Onboard Power Architecture	2023	2024	2025	2026	2027	2032	CAGR (%)
All-Electric Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Conventional Engine-Based Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Electric Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 462. India Cable Laying Vessel Market Size, by Infrastructure Application, 2017-2032 (USD Thousand)

Infrastructure Application	2023	2024	2025	2026	2027	2032	CAGR (%)
Defense and Security Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Industrial Infrastructure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Infrastructure Portfolios	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Offshore Renewable Energy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Power Transmission and Distribution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scientific and Environmental Monitoring	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Telecommunications Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 463. India Cable Laying Vessel Market Size, by Vessel Buyer, 2017-2032 (USD Thousand)

Vessel Buyer	2023	2024	2025	2026	2027	2032	CAGR (%)
Captive Infrastructure and Public-Service Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Cable-System Suppliers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Marine Installation and Maintenance Contractors	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Vessel Owners and Leasing Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 464. India Cable Laying Vessel Market Size, by Construction Pathway, 2017-2032 (USD Thousand)

Construction Pathway	2023	2024	2025	2026	2027	2032	CAGR (%)
Conversions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Newbuilds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 465. India Cable Laying Vessel Market Size, by Operating Envelope, 2017-2032 (USD Thousand)

Operating Envelope	2023	2024	2025	2026	2027	2032	CAGR (%)
Restricted Seagoing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sheltered and Inland Waters	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unrestricted Seagoing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 466. India Cable Laying Vessel Market Size, by Procurement Structure, 2017-2032 (USD Thousand)

Procurement Structure	2023	2024	2025	2026	2027	2032	CAGR (%)
Buyer-Managed Package Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Prime Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 467. India Cable Laying Vessel Market Size, by Cable Payload Capacity, 2017-2032 (USD Thousand)

Cable Payload Capacity	2023	2024	2025	2026	2027	2032	CAGR (%)
High Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Medium Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-High Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 468. India Cable Laying Vessel Market Size, by Cable-Laying Depth Capability, 2017-2032 (USD Thousand)

Cable-Laying Depth Capability	2023	2024	2025	2026	2027	2032	CAGR (%)
Deepwater Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intermediate-Depth Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Shallow-Water Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-Deepwater Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

21.11. Russia

Table 469. Russia Cable Laying Vessel Market Size, 2017-2032 (USD Thousand)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Russia	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 470. Russia Cable Laying Vessel Market Size, by Vessel Platform, 2017-2032 (USD Thousand)

Vessel Platform	2023	2024	2025	2026	2027	2032	CAGR (%)
Barges	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ships	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 471. Russia Cable Laying Vessel Market Size, by Mission Configuration, 2017-2032 (USD Thousand)

Mission Configuration	2023	2024	2025	2026	2027	2032	CAGR (%)
Combined Installation and Repair Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Installation-Focused Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multipurpose Construction Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Repair-Focused Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 472. Russia Cable Laying Vessel Market Size, by Cable Compatibility, 2017-2032 (USD Thousand)

Cable Compatibility	2023	2024	2025	2026	2027	2032	CAGR (%)
Communications Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multiple Cable Families	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Power Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sensing Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 473. Russia Cable Laying Vessel Market Size, by Station-Keeping System, 2017-2032 (USD Thousand)

Station-Keeping System	2023	2024	2025	2026	2027	2032	CAGR (%)
Anchored or Moored Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Basic Automatic Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manual or Tug-Assisted Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Seabed-Supported Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 474. Russia Cable Laying Vessel Market Size, by Onboard Power Architecture, 2017-2032 (USD Thousand)

Onboard Power Architecture	2023	2024	2025	2026	2027	2032	CAGR (%)
All-Electric Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Conventional Engine-Based Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Electric Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 475. Russia Cable Laying Vessel Market Size, by Infrastructure Application, 2017-2032 (USD Thousand)

Infrastructure Application	2023	2024	2025	2026	2027	2032	CAGR (%)
Defense and Security Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Industrial Infrastructure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Infrastructure Portfolios	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Offshore Renewable Energy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Power Transmission and Distribution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scientific and Environmental Monitoring	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Telecommunications Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 476. Russia Cable Laying Vessel Market Size, by Vessel Buyer, 2017-2032 (USD Thousand)

Vessel Buyer	2023	2024	2025	2026	2027	2032	CAGR (%)
Captive Infrastructure and Public-Service Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Cable-System Suppliers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Marine Installation and Maintenance Contractors	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Vessel Owners and Leasing Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 477. Russia Cable Laying Vessel Market Size, by Construction Pathway, 2017-2032 (USD Thousand)

Construction Pathway	2023	2024	2025	2026	2027	2032	CAGR (%)
Conversions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Newbuilds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 478. Russia Cable Laying Vessel Market Size, by Operating Envelope, 2017-2032 (USD Thousand)

Operating Envelope	2023	2024	2025	2026	2027	2032	CAGR (%)
Restricted Seagoing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sheltered and Inland Waters	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unrestricted Seagoing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 479. Russia Cable Laying Vessel Market Size, by Procurement Structure, 2017-2032 (USD Thousand)

Procurement Structure	2023	2024	2025	2026	2027	2032	CAGR (%)
Buyer-Managed Package Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Prime Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 480. Russia Cable Laying Vessel Market Size, by Cable Payload Capacity, 2017-2032 (USD Thousand)

Cable Payload Capacity	2023	2024	2025	2026	2027	2032	CAGR (%)
High Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Medium Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-High Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 481. Russia Cable Laying Vessel Market Size, by Cable-Laying Depth Capability, 2017-2032 (USD Thousand)

Cable-Laying Depth Capability	2023	2024	2025	2026	2027	2032	CAGR (%)
Deepwater Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intermediate-Depth Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Shallow-Water Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-Deepwater Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

21.12. Australia

Table 482. Australia Cable Laying Vessel Market Size, 2017-2032 (USD Thousand)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Australia	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 483. Australia Cable Laying Vessel Market Size, by Vessel Platform, 2017-2032 (USD Thousand)

Vessel Platform	2023	2024	2025	2026	2027	2032	CAGR (%)
Barges	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ships	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 484. Australia Cable Laying Vessel Market Size, by Mission Configuration, 2017-2032 (USD Thousand)

Mission Configuration	2023	2024	2025	2026	2027	2032	CAGR (%)
Combined Installation and Repair Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Installation-Focused Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multipurpose Construction Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Repair-Focused Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 485. Australia Cable Laying Vessel Market Size, by Cable Compatibility, 2017-2032 (USD Thousand)

Cable Compatibility	2023	2024	2025	2026	2027	2032	CAGR (%)
Communications Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multiple Cable Families	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Power Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sensing Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 486. Australia Cable Laying Vessel Market Size, by Station-Keeping System, 2017-2032 (USD Thousand)

Station-Keeping System	2023	2024	2025	2026	2027	2032	CAGR (%)
Anchored or Moored Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Basic Automatic Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manual or Tug-Assisted Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Seabed-Supported Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 487. Australia Cable Laying Vessel Market Size, by Onboard Power Architecture, 2017-2032 (USD Thousand)

Onboard Power Architecture	2023	2024	2025	2026	2027	2032	CAGR (%)
All-Electric Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Conventional Engine-Based Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Electric Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 488. Australia Cable Laying Vessel Market Size, by Infrastructure Application, 2017-2032 (USD Thousand)

Infrastructure Application	2023	2024	2025	2026	2027	2032	CAGR (%)
Defense and Security Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Industrial Infrastructure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Infrastructure Portfolios	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Offshore Renewable Energy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Power Transmission and Distribution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scientific and Environmental Monitoring	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Telecommunications Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 489. Australia Cable Laying Vessel Market Size, by Vessel Buyer, 2017-2032 (USD Thousand)

Vessel Buyer	2023	2024	2025	2026	2027	2032	CAGR (%)
Captive Infrastructure and Public-Service Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Cable-System Suppliers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Marine Installation and Maintenance Contractors	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Vessel Owners and Leasing Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 490. Australia Cable Laying Vessel Market Size, by Construction Pathway, 2017-2032 (USD Thousand)

Construction Pathway	2023	2024	2025	2026	2027	2032	CAGR (%)
Conversions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Newbuilds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 491. Australia Cable Laying Vessel Market Size, by Operating Envelope, 2017-2032 (USD Thousand)

Operating Envelope	2023	2024	2025	2026	2027	2032	CAGR (%)
Restricted Seagoing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sheltered and Inland Waters	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unrestricted Seagoing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 492. Australia Cable Laying Vessel Market Size, by Procurement Structure, 2017-2032 (USD Thousand)

Procurement Structure	2023	2024	2025	2026	2027	2032	CAGR (%)
Buyer-Managed Package Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Prime Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 493. Australia Cable Laying Vessel Market Size, by Cable Payload Capacity, 2017-2032 (USD Thousand)

Cable Payload Capacity	2023	2024	2025	2026	2027	2032	CAGR (%)
High Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Medium Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-High Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 494. Australia Cable Laying Vessel Market Size, by Cable-Laying Depth Capability, 2017-2032 (USD Thousand)

Cable-Laying Depth Capability	2023	2024	2025	2026	2027	2032	CAGR (%)
Deepwater Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intermediate-Depth Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Shallow-Water Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-Deepwater Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

21.13. Brazil

Table 495. Brazil Cable Laying Vessel Market Size, 2017-2032 (USD Thousand)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Brazil	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 496. Brazil Cable Laying Vessel Market Size, by Vessel Platform, 2017-2032 (USD Thousand)

Vessel Platform	2023	2024	2025	2026	2027	2032	CAGR (%)
Barges	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ships	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 497. Brazil Cable Laying Vessel Market Size, by Mission Configuration, 2017-2032 (USD Thousand)

Mission Configuration	2023	2024	2025	2026	2027	2032	CAGR (%)
Combined Installation and Repair Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Installation-Focused Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multipurpose Construction Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Repair-Focused Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 498. Brazil Cable Laying Vessel Market Size, by Cable Compatibility, 2017-2032 (USD Thousand)

Cable Compatibility	2023	2024	2025	2026	2027	2032	CAGR (%)
Communications Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multiple Cable Families	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Power Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sensing Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 499. Brazil Cable Laying Vessel Market Size, by Station-Keeping System, 2017-2032 (USD Thousand)

Station-Keeping System	2023	2024	2025	2026	2027	2032	CAGR (%)
Anchored or Moored Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Basic Automatic Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manual or Tug-Assisted Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Seabed-Supported Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 500. Brazil Cable Laying Vessel Market Size, by Onboard Power Architecture, 2017-2032 (USD Thousand)

Onboard Power Architecture	2023	2024	2025	2026	2027	2032	CAGR (%)
All-Electric Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Conventional Engine-Based Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Electric Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 501. Brazil Cable Laying Vessel Market Size, by Infrastructure Application, 2017-2032 (USD Thousand)

Infrastructure Application	2023	2024	2025	2026	2027	2032	CAGR (%)
Defense and Security Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Industrial Infrastructure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Infrastructure Portfolios	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Offshore Renewable Energy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Power Transmission and Distribution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scientific and Environmental Monitoring	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Telecommunications Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 502. Brazil Cable Laying Vessel Market Size, by Vessel Buyer, 2017-2032 (USD Thousand)

Vessel Buyer	2023	2024	2025	2026	2027	2032	CAGR (%)
Captive Infrastructure and Public-Service Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Cable-System Suppliers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Marine Installation and Maintenance Contractors	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Vessel Owners and Leasing Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 503. Brazil Cable Laying Vessel Market Size, by Construction Pathway, 2017-2032 (USD Thousand)

Construction Pathway	2023	2024	2025	2026	2027	2032	CAGR (%)
Conversions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Newbuilds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 504. Brazil Cable Laying Vessel Market Size, by Operating Envelope, 2017-2032 (USD Thousand)

Operating Envelope	2023	2024	2025	2026	2027	2032	CAGR (%)
Restricted Seagoing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sheltered and Inland Waters	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unrestricted Seagoing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 505. Brazil Cable Laying Vessel Market Size, by Procurement Structure, 2017-2032 (USD Thousand)

Procurement Structure	2023	2024	2025	2026	2027	2032	CAGR (%)
Buyer-Managed Package Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Prime Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 506. Brazil Cable Laying Vessel Market Size, by Cable Payload Capacity, 2017-2032 (USD Thousand)

Cable Payload Capacity	2023	2024	2025	2026	2027	2032	CAGR (%)
High Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Medium Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-High Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 507. Brazil Cable Laying Vessel Market Size, by Cable-Laying Depth Capability, 2017-2032 (USD Thousand)

Cable-Laying Depth Capability	2023	2024	2025	2026	2027	2032	CAGR (%)
Deepwater Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intermediate-Depth Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Shallow-Water Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-Deepwater Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

21.14. Spain

Table 508. Spain Cable Laying Vessel Market Size, 2017-2032 (USD Thousand)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Spain	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 509. Spain Cable Laying Vessel Market Size, by Vessel Platform, 2017-2032 (USD Thousand)

Vessel Platform	2023	2024	2025	2026	2027	2032	CAGR (%)
Barges	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ships	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 510. Spain Cable Laying Vessel Market Size, by Mission Configuration, 2017-2032 (USD Thousand)

Mission Configuration	2023	2024	2025	2026	2027	2032	CAGR (%)
Combined Installation and Repair Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Installation-Focused Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multipurpose Construction Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Repair-Focused Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 511. Spain Cable Laying Vessel Market Size, by Cable Compatibility, 2017-2032 (USD Thousand)

Cable Compatibility	2023	2024	2025	2026	2027	2032	CAGR (%)
Communications Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multiple Cable Families	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Power Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sensing Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 512. Spain Cable Laying Vessel Market Size, by Station-Keeping System, 2017-2032 (USD Thousand)

Station-Keeping System	2023	2024	2025	2026	2027	2032	CAGR (%)
Anchored or Moored Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Basic Automatic Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manual or Tug-Assisted Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Seabed-Supported Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 513. Spain Cable Laying Vessel Market Size, by Onboard Power Architecture, 2017-2032 (USD Thousand)

Onboard Power Architecture	2023	2024	2025	2026	2027	2032	CAGR (%)
All-Electric Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Conventional Engine-Based Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Electric Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 514. Spain Cable Laying Vessel Market Size, by Infrastructure Application, 2017-2032 (USD Thousand)

Infrastructure Application	2023	2024	2025	2026	2027	2032	CAGR (%)
Defense and Security Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Industrial Infrastructure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Infrastructure Portfolios	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Offshore Renewable Energy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Power Transmission and Distribution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scientific and Environmental Monitoring	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Telecommunications Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 515. Spain Cable Laying Vessel Market Size, by Vessel Buyer, 2017-2032 (USD Thousand)

Vessel Buyer	2023	2024	2025	2026	2027	2032	CAGR (%)
Captive Infrastructure and Public-Service Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Cable-System Suppliers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Marine Installation and Maintenance Contractors	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Vessel Owners and Leasing Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 516. Spain Cable Laying Vessel Market Size, by Construction Pathway, 2017-2032 (USD Thousand)

Construction Pathway	2023	2024	2025	2026	2027	2032	CAGR (%)
Conversions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Newbuilds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 517. Spain Cable Laying Vessel Market Size, by Operating Envelope, 2017-2032 (USD Thousand)

Operating Envelope	2023	2024	2025	2026	2027	2032	CAGR (%)
Restricted Seagoing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sheltered and Inland Waters	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unrestricted Seagoing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 518. Spain Cable Laying Vessel Market Size, by Procurement Structure, 2017-2032 (USD Thousand)

Procurement Structure	2023	2024	2025	2026	2027	2032	CAGR (%)
Buyer-Managed Package Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Prime Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 519. Spain Cable Laying Vessel Market Size, by Cable Payload Capacity, 2017-2032 (USD Thousand)

Cable Payload Capacity	2023	2024	2025	2026	2027	2032	CAGR (%)
High Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Medium Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-High Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 520. Spain Cable Laying Vessel Market Size, by Cable-Laying Depth Capability, 2017-2032 (USD Thousand)

Cable-Laying Depth Capability	2023	2024	2025	2026	2027	2032	CAGR (%)
Deepwater Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intermediate-Depth Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Shallow-Water Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-Deepwater Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

21.15. Mexico

Table 521. Mexico Cable Laying Vessel Market Size, 2017-2032 (USD Thousand)

Country	2023	2024	2025	2026	2027	2032	CAGR (%)
Mexico	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 522. Mexico Cable Laying Vessel Market Size, by Vessel Platform, 2017-2032 (USD Thousand)

Vessel Platform	2023	2024	2025	2026	2027	2032	CAGR (%)
Barges	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ships	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 523. Mexico Cable Laying Vessel Market Size, by Mission Configuration, 2017-2032 (USD Thousand)

Mission Configuration	2023	2024	2025	2026	2027	2032	CAGR (%)
Combined Installation and Repair Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Installation-Focused Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multipurpose Construction Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Repair-Focused Vessels	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 524. Mexico Cable Laying Vessel Market Size, by Cable Compatibility, 2017-2032 (USD Thousand)

Cable Compatibility	2023	2024	2025	2026	2027	2032	CAGR (%)
Communications Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multiple Cable Families	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Power Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sensing Cables Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 525. Mexico Cable Laying Vessel Market Size, by Station-Keeping System, 2017-2032 (USD Thousand)

Station-Keeping System	2023	2024	2025	2026	2027	2032	CAGR (%)
Anchored or Moored Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Basic Automatic Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DP Class xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manual or Tug-Assisted Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Seabed-Supported Positioning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 526. Mexico Cable Laying Vessel Market Size, by Onboard Power Architecture, 2017-2032 (USD Thousand)

Onboard Power Architecture	2023	2024	2025	2026	2027	2032	CAGR (%)
All-Electric Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Conventional Engine-Based Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Electric Power	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 527. Mexico Cable Laying Vessel Market Size, by Infrastructure Application, 2017-2032 (USD Thousand)

Infrastructure Application	2023	2024	2025	2026	2027	2032	CAGR (%)
Defense and Security Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Industrial Infrastructure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Infrastructure Portfolios	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Offshore Renewable Energy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Power Transmission and Distribution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scientific and Environmental Monitoring	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Telecommunications Networks	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 528. Mexico Cable Laying Vessel Market Size, by Vessel Buyer, 2017-2032 (USD Thousand)

Vessel Buyer	2023	2024	2025	2026	2027	2032	CAGR (%)
Captive Infrastructure and Public-Service Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Cable-System Suppliers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Marine Installation and Maintenance Contractors	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Vessel Owners and Leasing Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 529. Mexico Cable Laying Vessel Market Size, by Construction Pathway, 2017-2032 (USD Thousand)

Construction Pathway	2023	2024	2025	2026	2027	2032	CAGR (%)
Conversions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Newbuilds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 530. Mexico Cable Laying Vessel Market Size, by Operating Envelope, 2017-2032 (USD Thousand)

Operating Envelope	2023	2024	2025	2026	2027	2032	CAGR (%)
Restricted Seagoing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sheltered and Inland Waters	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unrestricted Seagoing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 531. Mexico Cable Laying Vessel Market Size, by Procurement Structure, 2017-2032 (USD Thousand)

Procurement Structure	2023	2024	2025	2026	2027	2032	CAGR (%)
Buyer-Managed Package Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Prime Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 532. Mexico Cable Laying Vessel Market Size, by Cable Payload Capacity, 2017-2032 (USD Thousand)

Cable Payload Capacity	2023	2024	2025	2026	2027	2032	CAGR (%)
High Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Medium Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-High Cable Payload	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 533. Mexico Cable Laying Vessel Market Size, by Cable-Laying Depth Capability, 2017-2032 (USD Thousand)

Cable-Laying Depth Capability	2023	2024	2025	2026	2027	2032	CAGR (%)
Deepwater Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intermediate-Depth Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Shallow-Water Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-Deepwater Capability	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

22. Competitive Landscape

22.1. Market Share Analysis, 2025

[illegible] These relationships support an incumbent qualification advantage through demonstrated collaboration, but do not establish exclusive customer preference. A competing builder must substantiate the proposed cable mission, integration scope, and acceptance responsibilities; a general offshore-vessel reference is insufficient for a like-for-like comparison.

Account access also depends on which packages the acquiring organization retains. Prysmian's Leonardo da Vinci arrangement separated its cable-equipment responsibility from VARD's naval platform, whereas Ulstein described Electra as turnkey vessel delivery. [illegible]

Cable-system suppliers and marine installers are not interchangeable competitors for every purchasing decision. Hornsea xx.xx separates NKT's cable manufacture from Jan De Nul's transport and installation responsibilities. [illegible]

Specialist-led construction provides an evidenced route for a yard that does not independently supply the cable mission system. Royal IHC's OMS program combines its platform and integrated mission equipment with construction at partner yard Pacific Shipbuilding in Vietnam. [illegible]

Figure 47. Global Cable Laying Vessel Market Share, by Key Player, 2025

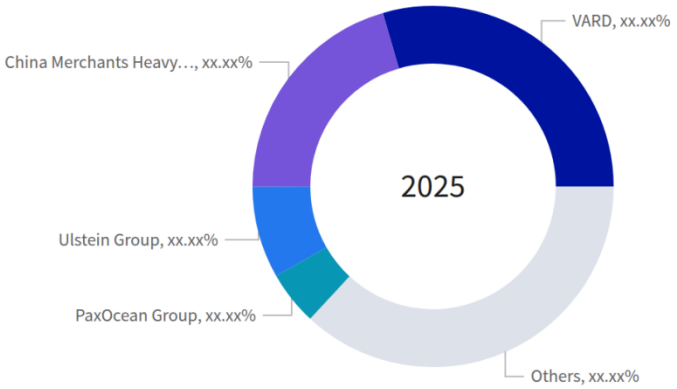

Table 534. Global Cable Laying Vessel Market Share, by Key Player, 2025

Key Player	Share (%)
China Merchants Heavy Industry	xx.xx
Colombo Dockyard PLC	xx.xx
Dimension Consultants	xx.xx
Freire Shipyard	xx.xx
Jiangsu Huatai Shipbuilding	xx.xx
LAD Services	xx.xx
Nantong Xiangyu Shipbuilding & Offshore Engineering	xx.xx
Neptune Marine	xx.xx
Pacific Shipbuilding Joint Stock Company	xx.xx
PaxOcean Group	xx.xx
Royal IHC	xx.xx
Sefine Shipyard	xx.xx
Tersan Shipyard Inc.	xx.xx
Ulstein Group	xx.xx
VARD	xx.xx
Others	xx.xx

Sources & Evidence

1. Ulstein Verft delivers the cable-laying vessel Nexans Electra

   · Ulstein records Electra's May xx.xx 2026 delivery, its earlier Aurora construction relationship with Nexans, and turnkey vessel delivery responsibility.
   ([ulstein.com](https://ulstein.com/news/ulstein-verft-delivers-the-cable-laying-vessel-nexans-electra))

2. Interview with Dario Brivio
   · Prysmian identifies its cable-laying-equipment responsibility on Leonardo da Vinci's VARD naval platform, supporting a buyer-managed package route. ([prysmian.com](https://www.prysmian.com/en/insight/projects/interview-dario-brivio))
3. VARD secures contract for one cable laying vessel for Prysmian Group
   · VARD's November xx.xx 2022 announcement records a repeat Prysmian construction order following Leonardo da Vinci's delivery in 2021; it establishes a delivery relationship, not exclusivity. ([vard.com](https://www.vard.com/articles/vard-secures-contract-for-one-cable-laying-vessel-for-prysmian-group-xx.xx))
4. Dynamic positioning (DP)
   · DNV describes interconnected positioning systems and assurance involving owners, customers, and charterers; equipment-switching consequences are configuration-dependent implications. ([dnv.com](https://www.dnv.com/services/dynamic-positioning-xx.xx/))
5. ASN and OMS Group selected by Intra-Asia Marine Networks Co., Ltd. to build the Intra-Asia Marine (I-AM) Cable System
   · The January xx.xx 2026 signed I-AM announcement assigns submarine-system supply to ASN and marine installation leadership to OMS, demonstrating separate contractual functions. ([asn.com](https://www.asn.com/wp-content/uploads/2026/xx.xx/ASN-Press-Release-Intra-Asia-Marine-Cable.pdf))
6. Offshore meets onshore: Hornsea 3's export cable arrives on land
   · Ørsted identifies NKT as Hornsea xx.xx's cable manufacturer and Jan De Nul as transport and installation contractor, supporting an independent marine-delivery route. ([orsted.co.uk](https://orsted.co.uk/media/newsroom/news/2026/xx.xx/offshore-meets-onshore-hornsea-xx.xx-export-cable-arrives-on-land))
7. Construction begins on CS GENESIS and CS TRIUMPH for OMS Group
   · Royal IHC identifies its platform and integrated mission equipment and construction at partner yard Pacific Shipbuilding for OMS; the program remains construction-stage. ([royalihc.com](https://www.royalihc.com/news/construction-begins-cs-genesis-and-cs-triumph-oms-group))

22.2. Market Concentration Analysis, 2025

Commercial control rests partly with the party authorized to commit a qualified vessel window, not necessarily the entity presenting the ship in its fleet. DeepOcean's announced Orient Adventurer charter from Dong Fang Offshore specifies employment from early 2026 through the end of 2027. ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪

Maintenance arrangements create a different control point: dispatch priority and permission to undertake competing work. Global Marine's published zone model covers scheduled cables, excludes certain shallow-water and beach-joint work unless separately contracted, and requires authority approval for some outside installation assignments. ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪

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Sources & Evidence

1. Interview with Dario Brivio
   · The platform-mission responsibility split establishes retained equipment control; sourcing leverage and interface exposure are conditional commercial implications.
   ([prysmian.com](https://www.prysmian.com/en/insight/projects/interview-dario-brivio))
2. Subsea Cable Maintenance
   · Global Marine describes scheduled-cable maintenance, shallow-water and beach-joint exclusions unless contracted, and approval requirements for some outside installation work. These are access controls, not unrestricted vessel availability.
   ([globalmarine.co.uk](https://globalmarine.co.uk/services/subsea-cable-maintenance/))
3. Dynamic positioning (DP)
   · Integrated mechanical, electrical, and electronic positioning interfaces support treating substitution as an assurance issue, not solely a sourcing choice.
   ([dnv.com](https://www.dnv.com/services/dynamic-positioning-xx.xx/))
4. VARD ONCE AGAIN PROVED WORTHY OF TRUST
   · VARD identifies Colombo Dockyard as builder of its designs for Orange Marine, establishing specialist design delivery through a separately identified yard.
   ([vard.com](https://www.vard.com/press-releases/vard-once-again-proved-worthy-of-trust))
5. Maintenance - Baltic Offshore
   · Baltic Offshore describes some repair and maintenance contracts as first-come, first-served and separately offers tailored mobilization, service, spread, and storage arrangements.
   ([balticoffshore.se](https://balticoffshore.se/services/mainteinance/))
6. Østensjø Rederi Secures Multiple New Contracts
   · Østensjø's January xx.xx 2025 announcement extends Edda Freya's DeepOcean employment through 2026, establishing separate owner and contractor roles over the named vessel.
   ([ostensjo.no](https://ostensjo.no/ostensjo-rederi-secures-multiple-new-contracts/))
7. DeepOcean Adds Orient Adventurer to Its Advanced Subsea Fleet
   · DeepOcean's January xx.xx 2025 announcement records a Dong Fang Offshore charter for Orient Adventurer from early 2026 through the end of 2027; actual release and booking rights require contractual verification.
   ([deepoceangroup.com](https://www.deepoceangroup.com/articles/deepocean-adds-orient-adventurer-to-its-advanced-subsea-fleet))

22.3. Recent Developments & Impact Analysis, 2025

Completed readiness milestones change the alternatives available for qualification differently from construction progress. Nexans' June xx.xx 2026 announcement identifies Electra as fully commissioned following its June xx.xx inauguration and joining the operational fleet. ■■

[illegible]

Global Marine's July xx.xx 2026 announcement distinguishes its recent CS Clipper acquisition from a separately contracted Colombo Dockyard maintenance newbuild scheduled for the fourth quarter of 2029. Solstad's earlier sale announcement identifies Global Marine as the existing charterer and records the ship's prior cable-laying employment. [illegible]

[illegible] Developers should compare this conditional route with the partners' existing project-specific services and cable supply. Reliance should follow binding approvals, vessel commitments, and allocation of prime responsibility; prospective integration does not establish delivered capability or acceptance across other cable applications.

Investment announcements can also cease before construction. [illegible] Any subsequent Kalypso restart requires a funded construction or charter commitment and delivery evidence before inclusion in a binding campaign schedule; the dated finding should not be generalized into withdrawal of all U.S. cable-vessel activity.

Sources & Evidence

1. **Commercial Shipbuilding: Selected Offshore Wind Projects Used a Mix of U.S. and Foreign Vessels, Spurring Some Shipbuilding Investments**
   - GAO's March xx.xx 2026 report states that Kalypso's proposed investment did not occur and construction was no longer proceeding as of December 2025. It does not establish a subsequent restart. ([files.gao.gov](https://files.gao.gov/reports/GAO-xx.xx-xx.xx/index.html))
   - GAO separately identifies Marmac xx.xx working at Empire Wind on export-cable installation and trenching, providing a realized partnered-barge counterexample to the discontinued initiative. ([files.gao.gov](https://files.gao.gov/reports/GAO-xx.xx-xx.xx/index.html))

2. CLV Nexans Electra: officially inaugurated
   · Nexans' June xx.xx 2026 announcement records the June xx.xx inauguration and identifies Electra as fully commissioned and joining its operational fleet; it does not reserve an individual campaign window. ([nexans.com](https://www.nexans.com/news/clv-nexans-electra-officially-inaugurated/))
3. NKT Eleonora på plass hos VARD Brattvåg
   · Remøy's August xx.xx 2026 update records Eleonora's arrival for outfitting, integration, and completion, with delivery planned for the first half of 2027. ([remoy-management.no](https://remoy-management.no/news/nkt-eleonora-pa-plass-hos-vard-brattvag/))
4. Introducing Our Next-Generation Cable Maintenance Vessel
   · Global Marine's July xx.xx 2026 announcement describes CS Clipper as recently acquired and separately schedules a Colombo Dockyard maintenance newbuild for the fourth quarter of 2029. ([globalmarine.co.uk](https://globalmarine.co.uk/introducing-our-next-generation-cable-maintenance-vessel/))
5. Solstad Maritime ASA - Sale of CSV Normand Clipper
   · Solstad's December xx.xx 2025 announcement identifies Global Marine as Normand Clipper's existing charterer exercising a purchase option and records prior cable-laying employment since 2020. ([solstad.com](https://www.solstad.com/solstad-maritime-asa-sale-of-csv-normand-clipper/))
6. DeepOcean and TFKable Group to develop integrated inter-array cable offering with cable-laying vessel
   · The September xx.xx 2026 agreement proposes integrated inter-array delivery and a dedicated vessel, retains competition approval and closing conditions, and places vessel development before project sanction. Existing project-specific services continue. ([deepoceangroup.com](https://www.deepoceangroup.com/articles/deepocean-and-tfkable-group-to-develop-integrated-inter-array-cable-offering-with-cable-laying-vessel))

22.4. Product Portfolio Analysis, 2025

Dedicated power-cable, telecommunications-repair, and combined installation-and-repair vessels serve different procurement requirements. ■■■■■■ ■■■■■■■■■ ■■■■■ ■■■■ ■■■■■■■■ ■ ■■■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■ ■■■ ■■■■ ■ ■■ ■■■■■■■ ■■■■■ ■■ ■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■ ■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■ ■■■■■ ■■ ■■■■■■■■ ■■■ ■■ ■■■■■■■■ ■■■■■■■ ■■■ ■■■■ ■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■■■■ ■■ ■ ■■■■■■■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■ ■■■■■■■■■■ ■■■■■■■ ■■ ■■■■■ ■■■■■■■■ ■■■ ■■■■■■■ ■■ ■■■■■■■■ ■■■■■■■■■■■■ A buyer should establish whether installation, recurring repair readiness, or combined employment governs the vessel specification rather than interpret portfolio breadth as interchangeable capability.

Barges and compact multipurpose ships offer access-oriented alternatives to dedicated offshore cable ships. Caldwell's Potomac River reference used a sectional, anchored cable-lay barge to accommodate restricted bridge clearance. ■■■■■■■■■■■■ ■■■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■ ■■■■■■■■■■■ ■■■ ■■■■■■ ■■■■■■■ ■■■■■■■■ ■ ■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■■■■■■ ■■■■■■■■■■■ ■■■■ ■■■■ ■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■ ■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■■ ■■■■ ■■ ■■■ ■■■■■■■■■ ■■■■■■■■■■■ ■■■■ ■■ ■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■ ■■■■■■ ■■■■■■ ■■■■■ ■■■■■■■ ■■■■■■■■■■■■■ ■■■■■ ■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■ ■■■■■■■■■ ■■■■■ ■■■■■■■ ■■ ■■■ ■■■■■■ ■■■■■■■■■■■■

Conversion provides another competitive pathway without eliminating integration requirements. Green Yard Kleven's delivered VEGA II conversion combined Marin Teknikk engineering with Parkburn cable-handling equipment for NTT's communications installation

and repair missions. ■■■■ ■■■■■■■■■■■■ ■ ■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■ ■■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■ ■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■ ■ ■■■■■■■■ ■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■ ■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■ ■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■■■■■■■■■■ ■■■■■■■■■■■■■■■■■

Modularity changes the procurement perimeter rather than proving universal vessel adaptability. Damen combines common platform elements with customer-specific mission equipment, while Huisman offers modular and fully integrated cable-lay systems. ■ ■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■ ■■■■■ ■■■■ ■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■ ■■■■■■■■■ ■ ■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■ ■■■■■■■ ■■■■■■■■ ■■ ■ ■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■ ■■■■■■ ■■■■■■■■■■■■ ■■■■ ■■ ■■■ ■■■■■■■ ■■■■■ ■■■■■■■■■■■ ■■■■■■ ■■■■■■■■■ ■■■■■■ ■■■ ■■ ■■■■■■■■■■ ■■ ■■■■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■■■■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■■■■ ■■■■■■■ ■■■■■■ ■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■ ■■■■ ■■■■■■■■■■■■ ■■■■■ ■■■■■ ■■■ ■■■■■■■■■■■■■■■■■■ ■■■■■■■■■■■■

Sources & Evidence

1. The Damen CLV: a new generation of cable layer
   · Damen describes common platform elements, customer-specific mission equipment, and a hybrid cable-vessel offering; these establish configuration choices rather than universal accepted adaptability. ([damen.com](https://www.damen.com/insights-center/articles/the-damen-clv-a-new-generation-of-cable-layer))
2. Conversion
   · DNV identifies existing structures, potentially limited original documentation, and class-yard-designer coordination as conversion constraints. ([dnv.com](https://www.dnv.com/services/ship-classification-fleet-in-service/conversion/))
3. Monna Lisa
   · VARD records Monna Lisa as a purpose-built Prysmian cable-laying vessel delivered in February 2025, supporting a dedicated power-cable construction comparison. ([vard.com](https://www.vard.com/shipbuilding/references/monna-lisa))
4. Construction begins on CS GENESIS and CS TRIUMPH for OMS Group
   · CS GENESIS and CS TRIUMPH are intended for fiber-optic cable laying and maintenance, with hybrid diesel-electric architecture; delivery is planned for 2027 and 2028 respectively. ([royalihc.com](https://www.royalihc.com/news/construction-begins-cs-genesis-and-cs-triumph-oms-group))
5. Green Yard Kleven leverer stort ombyggingsprosjekt med fokus på bærekraft
   · Green Yard Kleven reports VEGA II's delivered September 2024 conversion for NTT, with Marin Teknikk engineering and Parkburn cable-handling equipment, demonstrating an existing-hull cable-vessel pathway. ([greenyard.no](https://greenyard.no/nyhende-artiklar/green-yard-kleven-leverer-stort-ombyggingsprosjekt-med-fokus-p-brekraft))
6. VARD ONCE AGAIN PROVED WORTHY OF TRUST
   · VARD xx.xx xx.xx is designed for submarine fiber-optic maintenance; Sophie Germain was delivered by Colombo Dockyard on July xx.xx 2023, while the additional orders remain separate commitments. ([vard.com](https://www.vard.com/press-releases/vard-once-again-proved-worthy-of-trust))

7. Marine Construction Services | Caldwell Marine International
   · Caldwell's 2019 Potomac project describes a sectional cable-lay barge selected for restricted bridge clearance and anchored installation. It is a historical access-specific reference, not current availability evidence. ([caldwellmarine.com](https://www.caldwellmarine.com/marine-construction-services/))
8. Cable-Lay Systems
   · Huisman distinguishes modular cable-lay equipment from fully integrated systems for inter-array, export, and interconnector applications. Host integration and acceptance requirements are conditional procurement implications. ([huismanequipment.com](https://www.huismanequipment.com/en/products/renewables/offshore_wind/cable-lay-systems))
9. Briggs Marine Takes Delivery of New Maintenance Support Vessel from Freire Shipyard
   · Briggs records Forth Constructor's March xx.xx 2025 delivery from Freire, credits Cintranaval's design, and distinguishes its primary maintenance-support role from additional inshore cable-laying capability. ([briggsmarine.com](https://www.briggsmarine.com/media/news-insights/forth-constructor-delivery/))

22.5. Benchmarking Analysis, 2025

Benchmarking should separate construction counterparties from designers, equipment suppliers, owners, and installation contractors. VARD's Monna Lisa and Ulstein's Nexans Electra provide delivered construction references, but qualification still attaches to the proposed mission and contracted package. [redacted]

Installed capability must be distinguished from design provision. [redacted] Cable payload and laying-depth categories likewise require consistent specification boundaries and mission-specific acceptance, not reliance on tier labels alone.

Customer-confirmed execution and resilience under disruption are separate benchmarking questions. [redacted] The defensible comparison is therefore the contractor's committed spread, accepted equipment, substitution arrangements, and disruption responsibility-not an assumption that broader integration removes execution exposure or that a completed array-cable reference qualifies every export-cable mission.

[redacted] Buyers should obtain contracting identity, ownership or charter authority, operating responsibility, and relevant acceptance records before an asset-dependent award. Unresolved attribution is a qualification issue, not evidence of zero participation.

Sources & Evidence

1. The Damen CLV: a new generation of cable layer
   · Damen distinguishes preparation for DP2 installation from reserved space for DP3, supporting separation of design provision from installed capability. ([damen.com](https://www.damen.com/insights-center/articles/the-damen-clv-a-new-generation-of-cable-layer))
2. Ulstein Verft delivers the cable-laying vessel Nexans Electra
   · Ulstein identifies Electra as a delivered DP3 cable-laying vessel; the reference supports construction and installed-configuration comparison, not universal mission acceptance. ([ulstein.com](https://ulstein.com/news/ulstein-verft-delivers-the-cable-laying-vessel-nexans-electra))
3. Conversion
   · DNV's conversion guidance supports assessing the existing vessel record and agreed approval scope as additional qualification requirements. ([dnv.com](https://www.dnv.com/services/ship-classification-fleet-in-service/conversion/))
4. Dynamic positioning (DP)
   · DNV's vessel and charter-suitability assurance supports configuration-specific benchmarking rather than reliance on a positioning label alone. ([dnv.com](https://www.dnv.com/services/dynamic-positioning-xx.xx/))
5. Monna Lisa
   · Monna Lisa's named delivery and identified construction participants provide attributable construction evidence, not assurance of another order's acceptance or availability. ([vard.com](https://www.vard.com/shipbuilding/references/monna-lisa))
6. Van Oord completes work at RWE’s flagship 1.4 GW Sofia Offshore Wind Farm
   · RWE's September xx.xx 2025 announcement confirms completion of Van Oord's Sofia array-cable scope and identifies Calypso plus Boka Ocean contracted and managed through Van Oord. ([uk.rwe.com](https://uk.rwe.com/press-and-news/2025-xx.xx-xx.xx-van-oord-completes-work-at-rwes-flagship-xx.xx-xx.xx-gw-sofia-offshore-wind-farm/))
7. Van Oord Annual Report 2025 - Offshore Energy
   · Van Oord's offshore-energy review reports project delays associated with GPS jamming and spoofing and key supplier-equipment breakdowns. These are portfolio-level observations, not solely Sofia or cable-project outcomes. ([annualreport.vanoord.com](https://annualreport.vanoord.com/annual-report/world-of-van-oord/offshore-energy-xx.xx))
8. Royal IHC Annual Report 2024
   · Royal IHC's 2024 annual report names NCTI as a fiber-optic repair-spread customer. The cited passage does not identify a unique legal entity, vessel, or marine operating responsibility. ([royalihc.com](https://www.royalihc.com/sites/default/files/documents/Royal%20IHC%20Annual%20Report%xx.xx.pdf))

23. Company Profiles

23.1. Prysmian

Prysmian combines submarine power-cable supply with engineering, installation, protection, and inspection, maintenance, and repair services. ■■■ ■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■ ■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■ ■■■■ ■■ ■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■ For utilities, the relevant capability is integrated cable-system delivery; for shipbuilders and equipment suppliers, Prysmian is an asset buyer whose vessel requirements follow its cable-delivery obligations.

Asset status must remain vessel-specific. VARD records Monna Lisa as delivered in February 2025, while Prysmian's stated operational target for Alessandro Volta is early 2027. ■ ■■■■■■■■■ ■■■■■■■ ■■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■ ■■ ■■■■■■■■ ■■■■■■ ■■■ ■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■ ■■■■ ■■■ ■■■■ ■■■■ ■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■ ■■■■■■■■■■■ ■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■ ■■■ ■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■■■■ ■■ ■■■■■■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■■ ■■■ ■ ■■■■■■■■■ ■■■■■■■■■■■■■

Buyers considering an integrated Prysmian package should align the manufacturing reservation, nominated installation assets, shore-end responsibilities, and project approvals. This can centralize agreed delivery interfaces, but reduces the buyer's freedom to select marine packages independently. ■ ■■■■■ ■■■■■■■■■■■ ■■■■■■■ ■■ ■■■■■■■■■■■ ■■■■■ ■■■ ■■■■■ ■■■ ■■■■■■ ■■■■■■■■■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■

Sources & Evidence

1. New Installation capabilities for Submarine Cables
   · Prysmian offers engineering, installation, protection, and inspection, maintenance, and repair services and identifies Cable Enterprise and Ulisse as cable-laying barges alongside its cable ships. These offerings support configuration-specific package evaluation, not unrestricted vessel availability. ([prysmian.com](https://www.prysmian.com/en/markets/transmission/submarine-power/installation-capabilities))
2. Monna Lisa
   · VARD identifies Prysmian as Monna Lisa's owner and records delivery in February 2025. ([vard.com](https://www.vard.com/shipbuilding/references/monna-lisa))
3. Prysmian celebrates the Italian contribution to global innovation heritage with its new vessels
   · Prysmian states that Alessandro Volta is intended to become operational at the beginning of 2027; the statement is a target rather than evidence of completed acceptance. ([prysmian.com](https://www.prysmian.com/en/insight/transmission/prysmian-celebrates-the-italian-contribution-to-global-innovation-heritage-with-its-new-vessels))
4. Transpower secures cable supply for Cook Strait electricity link upgrade
   · On June xx.xx 2026, Transpower confirmed a Prysmian contract combining cable manufacture and vessel-based installation planned for 2031. Environmental approvals for physical works remained to be sought, supporting separation of contracted resources from completed deployment. ([transpower.co.nz](https://www.transpower.co.nz/news/transpower-secures-cable-supply-cook-strait-electricity-link-upgrade))

23.2. Nexans

Nexans offers engineering, procurement, construction, and installation of high-voltage cable systems using its own cable-laying vessels. Its offshore capability addresses interconnectors and offshore wind connections, supported by a separate inspection, maintenance, and repair offering. ▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪

Nexans Electra is a commissioned asset, not merely an announced addition. The May xx.xx 2026 handover was followed by final commissioning; Nexans' June announcement identifies the vessel as fully commissioned and joining its operational fleet following the June xx.xx inauguration. ▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪

Sources & Evidence

1. Official handover of CLV Nexans Electra
   - Nexans records Electra's operational handover on May xx.xx 2026, followed by final commissioning. ([nexans.com](https://www.nexans.com/press-releases/official-handover-of-clv-nexans-electra/))
2. High-voltage power transmission solutions
   - Nexans offers integrated high-voltage cable-system delivery using its own installation vessels and separately describes inspection, maintenance, and repair services. Contract-specific accountability and service availability are analytical verification requirements, not established outcomes. ([nexans.com](https://www.nexans.com/electrification-solutions/markets/transmission/))
3. CLV Nexans Electra: officially inaugurated
   - Nexans' June xx.xx 2026 announcement records the June xx.xx inauguration and identifies Electra as fully commissioned and joining the operational fleet. It describes hybrid power and offshore-wind and interconnector installation capability, without establishing availability for an individual assignment. ([nexans.com](https://www.nexans.com/news/clv-nexans-electra-officially-inaugurated/))

23.3. NKT

NKT links high-voltage cable manufacture with marine installation capability through NKT Victoria. ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪ ▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪ Additional equipment and customer acceptance still need to match the proposed assignment.

NKT's delivery model can also separate cable supply from marine execution. ▪▪ ▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪ ▪▪ ▪▪▪ ▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪

■■■■■■■■■■ ■■ ■■■■■ ■■■ ■■■■■■■ Buyers should determine whether installation is included, subcontracted, or separately contracted before comparing responsibility and schedule exposure.

NKT Eleonora represents staged future capability. NKT's annual report targets service entry in 2027, and the vessel manager's August xx.xx 2026 update records arrival in Norway for outfitting, integration, and completion, with delivery planned for the first half of 2027. ■ ■■■■■ ■■■■■■■■■ ■■■■ ■■■■■■ ■■■■■■■ ■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■■ ■■ ■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■ ■■■■■■■■■■ ■■ ■■■■■■■■■■■■■■■ ■■ ■■■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■ ■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■ ■■■■■■■ ■■■■■■■ ■■■■■■■■■■

Sources & Evidence

1. NKT Victoria: purpose built cable-laying vessel
   · NKT Victoria's technical documentation describes HVAC and HVDC cable handling, fiber-optic accommodation, and DP3 positioning. These establish documented vessel characteristics, not acceptance for every proposed mission. ([nkt.widen.net](https://nkt.widen.net/content/elisibu8iv/pdf/Vessel_technical_sheetHV_HV_DS_EN.pdf?u=gj0n1y))
2. NKT Annual Report 2025
   · NKT's annual report describes coordinated high-voltage production investment and NKT Eleonora construction, with the new vessel expected to enter service in 2027. ([investors.nkt.com](https://investors.nkt.com/files/AGM/2026/en/nkt-annual-report-2025.pdf))
3. NKT Eleonora på plass hos VARD Brattvåg
   · The vessel manager's August xx.xx 2026 update records Eleonora's arrival at VARD Brattvåg for outfitting, system integration, testing, and completion, with delivery planned for the first half of 2027. ([remoy-management.no](https://remoy-management.no/news/nkt-eleonora-pa-plass-hos-vard-brattvag/))
4. Offshore meets onshore: Hornsea 3's export cable arrives on land
   · Ørsted's 2026 update identifies NKT as the Hornsea xx.xx export-cable manufacturer and Jan De Nul as the transport and installation contractor, demonstrating a split supply-and-installation arrangement. ([orsted.co.uk](https://orsted.co.uk/media/newsroom/news/2026/xx.xx/offshore-meets-onshore-hornsea-xx.xx-export-cable-arrives-on-land))

23.4. Alcatel Submarine Networks

Alcatel Submarine Networks combines submarine communications-system supply with European manufacturing and a dedicated cable-ship fleet. ■■■■■■■■■ ■■■■ ■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■ ■■■ ■■■■■■■ ■■■■■■■■■ ■■■ ■■■ ■■■■■■■■■■■■■■ ■■■■ ■■■ ■■■ ■■■■■■■■■ ■■■■■■ ■■■■■■■■■■ The reference supports regional participation, not automatic authorization for another project.

■■■ ■■■■■■■ ■■■ ■■■■ ■■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■ ■■■■■■ ■■ ■■■ ■■■ ■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■ ■■ ■■■ ■■■■■ ■■ ■■■■■■■■■■■■■ ■■■■■■■ ■■■■■■ ■■■■■■■■ ■■■ ■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■ ■■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■ ASN's fleet creates an internal delivery option, but a system award neither guarantees captive-vessel deployment nor establishes a new vessel purchase. Partner-led delivery preserves an additional contractual interface.

Sources & Evidence

1. ASN and OMS Group selected by Intra-Asia Marine Networks Co., Ltd. to build the Intra-Asia Marine (I-AM) Cable System
   · The January xx.xx 2026 I-AM announcement assigns system supply to ASN and marine installation leadership to OMS Group, while describing ASN's European manufacturing and dedicated fleet. ([asn.com](https://www.asn.com/wp-content/uploads/2026/xx.xx/ASN-Press-Release-Intra-Asia-Marine-Cable.pdf))
2. Resolución N° 745/020
   · Uruguay's July 2020 authorization identifies ASN as the turnkey installer of the Santos-Punta del Este system and the contractor for its extension toward Las Toninas, Argentina. This is a project-specific regional reference. ([impo.com.uy](https://www.impo.com.uy/bases/resoluciones-originales/xx.xx-2020))

23.5. SubCom

SubCom supplies integrated submarine fiber-optic networks, coupling manufacturing in Newington, New Hampshire, with vessel-based installation. ■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■ ■■ ■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■ ■■■■■■■■ ■ ■■■■■■■■ ■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■ ■■ ■■■■■■■■■ ■■■■ ■■■■■■■■■■ These capabilities position SubCom as a cable-system supplier and marine operator, rather than simply a source of vessel access.

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SubCom also offers repairs, depot storage, spare-inventory management, and marine maintenance support for its own and alternatively supplied systems. This creates a support-only route for existing cable owners, conditional on compatibility and contractual coverage. ■■ ■■■■■■ ■■■■■■■■■ ■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■ ■■ ■■■ ■■■■■■■■ ■■■■■■ ■■■■■■■■■ ■■■ ■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■ ■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■■■■■■

Sources & Evidence

1. SubCom-OverviewFlyer-2025-web
   · SubCom offers marine repairs, depot storage, spare-inventory management, and maintenance support, and states that support services are available for SubCom and alternatively supplied systems. Compatibility and contractual coverage require buyer verification. ([subcom.com](https://www.subcom.com/documents/SubCom-OverviewFlyer-2025-web.pdf))
2. Buque que instala un nuevo cable de fibra óptica en el cono sur, opera en el puerto de Montevideo
   · Uruguay's port authority identifies SubCom as Google's contracted Firmina installer and describes installation participation in Uruguay, Argentina, and Brazil. ([anp.com.uy](https://www.anp.com.uy/index.php/es/inicio/comunicacion/noticias/buque-que-instala-un-nuevo-cable-de-fibra-optica-en-el-cono-sur-opera-en-el-puerto-de-montevideo))

3. Space Norway and SubCom Announce Contract-in-Force for Arctic Way Cable System
   · The May xx.xx 2025 Arctic Way contract-in-force announcement assigns manufacturing in Newington and installation using a polar-certified Reliance-class ship. It gives a second-quarter 2028 ready-for-service target, not a completed deployment.
   ([subcom.com](https://subcom.com/documents/2025/Arctic_Way_Space_Norway_SubCom_CIF_April2025_1MAY2025.pdf))

23.6. Orange Marine

Orange Marine provides cable installation and maintenance through its represented marine business, including Italian subsidiary Elettra TLC. Orange identifies maintenance responsibilities spanning the Atlantic, Indian Ocean, Mediterranean, Black Sea, and Red Sea, with existing vessels based in South Africa and Italy. ■■■ ■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■ ■■ ■■■■■■■ ■■■■ ■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■ ■■■■ ■■■■■■■■ ■■■■■■■■ ■■ ■■■■ ■■■ ■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■ ■■ ■■■■■■■ ■■■ ■■ ■■■■■■■ ■■ ■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■ ■■ ■■■■■■ ■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■■

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Sources & Evidence

1. Orange Marine modernizes its fleet of cable ships to secure digital infrastructure in Europe, Africa and the Middle East
   · Orange identifies Elettra TLC within the represented marine business and describes existing maintenance responsibilities and South African and Italian vessel bases. Ordered replacement vessels are expected in 2028 and 2029, rather than being operating additions.
   ([orange.com](https://www.orange.com/assets/document/xx.xx/download))
2. Global Marine partners with Orange Marine to deploy next-generation Alpha ROV on new cable maintenance vessel
   · The September xx.xx 2026 collaboration assigns design and manufacture of a customized Alpha ROV to Orange Marine for Global Marine's future maintenance vessel. The announcement establishes a supply route, not completed deployment or fleet-wide power-cable capability.
   ([globalmarine.co.uk](https://globalmarine.co.uk/global-marine-selects-orange-marines-next-generation-alpha-rov/))

23.7. Global Marine Group

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distinguish access to this service organization from ownership of every vessel attributed to the represented fleet, including joint-venture and charter arrangements.

The published maintenance model covers scheduled cables and contains important package boundaries. Shallow-water work and beach joints are excluded unless specifically contracted, while some maintenance vessels can undertake third-party installation only with the relevant maintenance authority's approval. ■■■■■ ■■■■■■ ■■■■■■ ■■■■■■ ■■■■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■ ■■■■■■ ■■■■■■ ■■■■■■■ ■■■■■■■■■ ■■■■■■ ■■■■■■■■ ■■■■■■■■■■■ ■■■■■■ ■■ ■■■■■■ ■■■■■■■■■■ ■■■■■■■■■

Fleet renewal also contains different commercial events. ■■■■■■■■■ ■■■■■■■■ ■■■■■ ■■■■■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■■ ■■■■■ ■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■ ■ ■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■ ■■■■ ■■■ ■■■■ ■■■■■■■■■■■■ ■■■■■■■■■ ■■ ■■■■■■■■ ■■ ■ ■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■■■ ■■■■■ ■■■■■■■■ ■■■ ■■■■ ■■■ ■■■■ ■■■ ■■■■■■■ ■■■■■■ ■■■■■■■■■■■ ■■ ■■■ ■■■■■■■■■■■■ The separately contracted, purpose-built maintenance vessel is scheduled for delivery in the fourth quarter of 2029 and should remain distinct from operating assets until accepted.

Sources & Evidence

1. Subsea Cable Maintenance
   · Global Marine's maintenance scope excludes shallow-water work and beach joints unless specifically contracted. Its published zone arrangements require authority approval for certain third-party installation work and specify spares and response obligations. ([globalmarine.co.uk](https://globalmarine.co.uk/services/subsea-cable-maintenance/))
2. About Global Marine
   · Global Marine identifies itself as part of Global Marine Group, with UK and Singapore offices, installation and emergency-repair services, long-term charters, depots, and a joint venture supporting regional maintenance. ([globalmarine.co.uk](https://globalmarine.co.uk/about-us/about-global-marine/))
3. Introducing Our Next-Generation Cable Maintenance Vessel
   · Global Marine's July xx.xx 2026 announcement describes CS Clipper as recently acquired and separately schedules a purpose-built maintenance newbuild for fourth-quarter 2029 delivery. ([globalmarine.co.uk](https://globalmarine.co.uk/introducing-our-next-generation-cable-maintenance-vessel/))
4. Solstad Maritime ASA - Sale of CSV Normand Clipper
   · Solstad's December xx.xx 2025 notice identifies Global Marine Group as Normand Clipper's charterer exercising a purchase option and states that the vessel had supported its cable-laying operations since 2020. ([solstad.com](https://www.solstad.com/solstad-maritime-asa-sale-of-csv-normand-clipper/))

23.8. Jan De Nul

Jan De Nul provides a marine-contractor route for power-cable projects that can combine seabed preparation, transport, installation, and protection. Ørsted's Hornsea xx.xx award names Isaac Newton and Connector for cable transport and installation and Simon Stevin for complementary rock protection. ■■■■■■■■ ■■■■ ■■■■■■ ■■■■■■■■ ■■■ ■■■■■ ■■■■■■ ■■■■■ ■■■■■■■■ ■■■■■ ■■■ ■■■■■■■■■■ ■■■ ■■ ■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■ ■■ ■■■■■■■■■ ■■■■■■■■■

Hornsea xx.xx also separates NKT's cable-manufacturing role from Jan De Nul's marine package. This offers buyers a demonstrated alternative to procuring installation through the

cable supplier, particularly where preparation and protection need coordinated marine responsibility. ■■■ ■■■■■■■■■ ■■ ■ ■■■■■■■■ ■■■■■■■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■ ■■■■■■■■■■■■ ■■■■■■ ■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■ ■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■ ■■■■■■■■ ■■■ ■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■■■■ ■■ ■■■■■■■■■■■ ■■■■■■■ ■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■ ■ ■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■ ■■■■ ■■■■■■■■■■■ ■ ■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■■■

Sources & Evidence

1. Ørsted’s Hornsea 3 export cable contract awarded to Jan De Nul
   · Ørsted's Hornsea xx.xx award assigns seabed preparation, transport, installation, and protection to Jan De Nul, naming Isaac Newton and Connector for cable work and Simon Stevin for complementary rock protection. ([orsted.co.uk](https://orsted.co.uk/media/newsroom/news/2024/xx.xx/hornsea-xx.xx-export-cable))
2. Offshore meets onshore: Hornsea 3's export cable arrives on land
   · The update reports the first offshore export cable reaching shore and identifies Jan De Nul's continuing installation role, corroborating execution participation rather than only an awarded contract. ([orsted.co.uk](https://orsted.co.uk/media/newsroom/news/2026/xx.xx/offshore-meets-onshore-hornsea-xx.xx-export-cable-arrives-on-land))
3. Jan De Nul’s Fleeming Jenkin Begins Sea Trials Ahead of TenneT Assignment
   · September xx.xx 2026 reporting describes Fleeming Jenkin entering sea trials and presents delivery and the initial TenneT assignment as subsequent steps. It corroborates a dated construction event, not accepted installation readiness. ([oceannews.com](https://oceannews.com/news/subsea-cable/jan-de-nuls-fleeming-jenkin-begins-sea-trials-ahead-of-tennet-assignment/))

23.9. Van Oord

Van Oord is relevant to offshore-wind developers seeking coordinated cable and foundation installation rather than vessel access alone. Its cable-laying assets include Nexus and Calypso. ■■■ ■■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■ ■■ ■■■■■■■ ■■■ ■■■■■ ■■■■■■■■■■ ■ ■■■■■■■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■■■ ■■■ ■■■■■■ ■■■■■■■ ■■■■■■■■■ ■■■■ ■■■■■■■■■■■■■ ■■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■ ■■■ ■■■■■■■■■■■■■■ ■■■■■■■■■ ■■ ■■■■■■■■■ ■■■■■■■■

RWE confirmed completion of Van Oord's Sofia array-cable scope on September xx.xx 2025. Calypso performed much of the work, while Boka Ocean completed the remaining cables under an arrangement contracted and managed through Van Oord. ■■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■ ■ ■■■■■■■■■■■■ ■■■ ■■■■■ ■■■■■■■■ ■■■■■■■■■■■ ■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■■ ■■■■ ■■■■■■ ■■■■■■ ■■■■■ ■■■■■■■■■ ■■ ■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■ ■■■■■■■■■■■■ ■■ ■■■■■ ■■■■■■■■■■■■

The wider installation offering can consolidate customer interfaces, but execution risk remains. ■■■ ■■■■■■ ■■■■ ■■■■■■■■■■■■■■■ ■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■

[illegible] A broader prime contract can transfer agreed coordination tasks; a buyer-managed package preserves more direct supplier control but also retains those interfaces.

Sources & Evidence

1. Van Oord's cable-laying vessel Calypso makes its debut and is now fully operational
   - Van Oord reported Calypso fully operational on October xx.xx 2024, and identified Nexus as another cable-laying vessel.
   - Calypso is described for inter-array and export cables, including HVDC applications, with compatible trenchers, hybrid power, battery storage, and a shore connection.
2. Van Oord completes work at RWE's flagship 1.4 GW Sofia Offshore Wind Farm
   - RWE confirmed completion of Van Oord's Sofia array-cable scope on September xx.xx 2025.
   - RWE identified Calypso's participation and stated that Boka Ocean completed remaining cables under an arrangement contracted and managed through Van Oord.
3. Van Oord Annual Report 2025 - Offshore Energy
   - Van Oord's 2025 offshore-energy review identifies GPS jamming and spoofing and key supplier-equipment breakdowns as causes of project delays.
   - The review describes offshore-wind scopes combining foundation installation, scour protection, cable laying, and turbine installation; the reported disruption causes are portfolio-level observations.

23.10. DEME Group

DEME Group offers a power-cable construction package extending beyond cable laying. Its offshore offering covers cable and accessory supply, route preparation, landfalls, installation, burial, protection, and final electrical acceptance activities. [illegible]

DEME's September xx.xx 2025 announcement described an ordered offshore construction vessel intended to combine cable laying, trenching, and burial, with hybrid power and a methanol-ready design. [illegible] A wider DEME package can reduce buyer-managed handoffs, whereas separately procuring cables and marine installation preserves supplier choice but requires explicit allocation of cable, landfall, and protection responsibilities.

Sources & Evidence

1. Offshore | DEME Group
   - DEME describes power-cable supply and construction services covering accessories, route preparation, landfalls, laying, burial, protection, and final electrical acceptance activities.
   - The page identifies Living Stone as a cable-installation and multipurpose vessel and presents execution references in the United Kingdom and Belgium.

2. DEME orders Offshore Construction Vessel to strengthen subsea cable installation capacity
   - DEME's September xx.xx 2025 announcement identifies Living Stone and Viking Neptun as existing cable-installation vessels.
   - The ordered offshore construction vessel is intended for cable laying, trenching, and burial, with hybrid power and a methanol-ready design; the announcement does not establish completed delivery.

23.11. Boskalis

Boskalis is suited to power-cable projects where cable laying must be coordinated with seabed preparation and protection. Its offering includes export, interconnector, and inter-array installation, supported by survey, dredging, rock placement, engineering, and repair services. ■■■ ■■■■■ ■■■■■ ■■■ ■■■■■■■■■ ■■■■ ■■■■■ ■■ ■■■■■■■■■ ■■ ■■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■ ■ ■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■ ■■■■■ ■ ■■■ ■■■■ ■■■■■■■■■■■■ ■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■ ■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■ ■■■■■■ ■■■■■■ ■■■ ■■ ■■■■■■■ ■■ ■■■■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■

The 2019-2020 Öresund replacement provides a concrete example of the integrated approach. Delivered through a consortium with NKT, the work combined cable replacement with dredging, burial, and rock protection under a restricted outage window between Sweden and Denmark. ■■■ ■■■■■■■■■■ ■■■■■■ ■■ ■■■■ ■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■ ■■■■■■■■ ■■ ■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■

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Sources & Evidence

1. Subsea Cables | Boskalis
   - Boskalis offers export, interconnector, and inter-array installation with survey, seabed preparation, dredging, rock placement, engineering, and repair services.
   - The page distinguishes Boka Ocean and Ndurance cable-laying roles, Giant xx.xx and Boka Constructor nearshore barge roles, and Ndeavor's trenching-support role.
2. Öresund - Replacement of the Öresund Connection
   - The Öresund project sheet identifies a 2019-2020 cable-replacement assignment between Sweden and Denmark delivered by a Boskalis-NKT consortium, with NKT supplying cables.
   - The documented marine package combined replacement, dredging, burial, and rock protection within a restricted outage period.

23.12. Seaway7

Seaway7 offers offshore-energy cable installation, repair, and maintenance through a combination of cable-laying vessels and complementary support services. ■■■■■■ ■■■■■■■ ■■ ■■■■■■■■■ ■■ ■■ ■■■■■■■■■■■ ■■■ ■■■■■■ ■■■■■■ ■■■■ ■ ■■■■■■■■■ ■■■■■■■■ ■■■■ ■■■ ■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■ ■■ ■■■■ ■■■■■■■■■■ ■■ ■■■ ■■■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■ ■■■■■ ■■■■■■ ■ ■■■■■■■■■ ■■■■■■■■ ■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■■■ ■■

RESEARCH SAMPLE REPORT

[redacted] A buyer should assess the combined installation system rather than assume that support-vessel availability establishes cable-laying capability.

Seaway7 offers related survey, route-clearance, intervention, and protection services either within turnkey projects or as separate packages. Its Eemshaven marine base provides cable and accessory storage. [redacted]

[redacted] The award establishes contracting exposure, not completed marine work or unrestricted vessel availability. Before committing, customers should obtain the proposed regional delivery organization, accepted vessel assignment, and firm campaign commitment.

Sources & Evidence

1. Cable Laying Services | Seaway7
   - Seaway7 offers cable and umbilical installation, repair, maintenance, and related survey, clearance, intervention, and protection services, either within turnkey projects or separately.
   - The page identifies Seaway Aimery, Seaway Moxie's offshore-personnel access role, and cable and accessory storage at the Eemshaven marine base.
2. Cable Lay Archives | Seaway7
   - Seaway7 presents Seaway Phoenix as a cable-installation, repair, and maintenance vessel for offshore renewables and oil-and-gas applications.
   - Its described equipment includes a sheltered cable-handling deck, work-class ROVs, and a trenching ROV.
3. Subsea7 awarded cable installation contract in Taiwan
   - Subsea7 announced Seaway7's Formosa xx.xx inter-array cable transport and installation award in Taiwan on September xx.xx 2025.
   - The announcement expected offshore work to commence in 2028; it establishes an award and planned execution timing, not completed marine work.

23.13. LD Armateurs

LD Armateurs provides a ship-management and marine-operating route for cable-system suppliers and vessel owners. Its cable-ship offering identifies management relationships with ASN and OMS, supported by specialist crews and worldwide deployment experience. [redacted]

Cable Vigilance illustrates the conversion-to-operation capability. [redacted]

RESEARCH SAMPLE REPORT

[redacted] This is an evidenced alternative for an owner that wants to retain the asset while obtaining specialist conversion and management support; it is not proof that all approval or system-delivery obligations transfer to LDA.

[redacted] Owners and system suppliers should distinguish that project role from ship management and specify the responsible contracting entity, equipment interfaces, acceptance obligations, and dispatch authority. Outsourcing these functions provides specialist execution support, while retaining separate packages preserves control but increases the owner's coordination burden.

Sources & Evidence

1. Cable Ships | LD Armateurs
   - LD Armateurs identifies cable-ship management relationships with ASN and OMS and describes specialist crews and worldwide deployment capability.
   - These management relationships support distinguishing the ship manager from the asset owner and commercial installation counterparty.
2. Cable laying & maintenance | LD Armateurs
   - LD TravOcean's described services include submarine cable installation and protection across fiber-optic cables, electrical cables, and umbilicals.
   - The page describes worldwide equipment deployment on project-adapted chartered support vessels and services extending from route selection to maintenance and repair.
3. Entrée en flotte du nouveau navire câblier Cable Vigilance
   - LD Armateurs reported Cable Vigilance's entry into OMS's fleet in July 2022 following conversion, for European telecommunications installation and maintenance under French-flag operation.
   - LDA described acquisition assistance, design, shipyard tendering and supervision, and vessel operation as its project contributions.

23.14. OMS Group Sdn Bhd

OMS Group Sdn Bhd combines telecommunications marine installation and maintenance with cable-landing and terrestrial connectivity capabilities in Southeast Asia. Its published vessel portfolio includes Ile de Re, Lodbrog, Cable Vigilance, and Teneo for installation or repair missions, alongside cable-laying barges and supporting tugboats. [redacted]

The January xx.xx 2026 I-AM contract demonstrates a cable-system supplier partnership: ASN supplies the submarine system and associated equipment, while OMS leads marine installation. This is a concrete option for suppliers seeking contracted marine execution rather than relying exclusively on captive ships. [redacted]

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Sources & Evidence

1. ASN and OMS Group selected by Intra-Asia Marine Networks Co., Ltd. to build the Intra-Asia Marine (I-AM) Cable System
   - The January xx.xx 2026 I-AM announcement identifies a signed supply-and-installation contract.
   - ASN supplies the submarine cable system and associated equipment, while OMS leads marine installation; the announcement establishes contractual roles rather than completed installation.
2. Cable Ships | LD Armateurs
   - LD Armateurs describes management of OMS cable ships, including Cable Vigilance, supporting separate identification of OMS's commercial marine role and the ship-management role.
3. About | OMS Group Sdn Bhd
   - OMS describes telecommunications installation and maintenance, shore-end work, engineering, surveys, and project support.
   - Its stated capabilities include cable-landing stations and terrestrial connectivity infrastructure in Southeast Asia.
4. Vessels | OMS Group Sdn Bhd
   - OMS's vessel portfolio presents Ile de Re, Lodbrog, Cable Vigilance, and Teneo for installation or repair missions.
   - The portfolio separately presents cable-laying barges and supporting tugboats, supporting a differentiated offshore and shore-approach asset assessment.
5. Construction begins on CS GENESIS and CS TRIUMPH for OMS Group
   - Royal IHC reported the start of construction of OMS's CS GENESIS and CS TRIUMPH on December xx.xx 2025.
   - Deliveries were planned for 2027 and 2028, respectively; the announced designs combine cable installation and maintenance with integrated mission equipment and hybrid diesel-electric power.

23.15. S. B. Submarine Systems

S. B. Submarine Systems offers installation and maintenance across telecommunications and power-cable applications, with additional offshore-energy exposure. ■■■ ■■■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■ ■■■■ ■■ ■■ ■■■■ ■■■ ■■■■ ■■■■■■■■ ■■ ■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■■ ■■■■■■■■■■■■■■■ ■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■ ■■■■■■■■■ ■■■■■ ■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■ ■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■ Cross-family participation does not establish that every listed vessel is accepted for every cable type or mission.

The Wujing cable depot in Shanghai provides a complementary readiness capability. ■■■■ ■■■■■■■■■ ■■■■■■ ■■■■■■■■■■■■■■■■■ ■■■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■ ■■■ ■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■ ■■■ ■■■■■■ ■■■■■ ■■■■■■ ■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■■ ■■■■■■ ■■■■ ■■■■■■■■■■■■■ ■■■■■■■ ■■■■■ ■■■■■ ■■■ ■■■■■■■■ ■ ■■■■■■■■■■■ ■■■■■■■■■■■ ■■■■ ■■■■■■■■ ■■■■ ■■■■■■■■■ ■■■ ■■■■ ■■■■■■ Buyers should

verify that the relevant spare equipment is held, releasable, and compatible with the contracted repair scope; depot presence does not guarantee immediate vessel dispatch.

SBSS's reported Brazilian telecommunications work involving Bold Maverick demonstrates overseas project participation beyond its depot location. ■■ ■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■ ■■■■■■■■■■■■ ■■ ■■■■■■ ■■■ ■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■■■■■■■■■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■■■ ■■■■■■■ ■■■■■■ ■■■ ■■■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■■ ■ ■■■■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■ ■■■ ■ ■■■■■■■■ ■■■■■■■■■■■ ■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■■■■■ Consolidating logistics and marine work can simplify coordination, but ties readiness to the agreed storage location and service obligations.

Sources & Evidence

1. SBSS-About us
   - SBSS describes submarine cable installation and maintenance for fiber-optic and power applications, serving telecommunications, power utilities, oil and gas, and renewables.
   - The page identifies the legal company name as S. B. Submarine Systems Co., Ltd.
2. SBSS - Fleet
   - SBSS identifies Fu Tai, CS Fu Hai, and Bold Maverick as DP2 vessels specializing in submarine cable installation and maintenance.
   - The fleet page describes different onboard subsea equipment for the named vessels, supporting vessel-specific rather than fleet-wide equipment assumptions.
3. SBSS - Subsea Power Interconnector Matters
   - SBSS's power-utility offering includes planning, permitting and survey, shore ends, protection, inspection, and repair.
   - The company identifies power-cable project experience in China and overseas markets, including Australia, South Korea, and Bangladesh.
4. SBSS - Wujing Cable Depot
   - SBSS describes owning and managing the Wujing cable depot in Shanghai.
   - The depot includes bonded telecommunications cable storage, covered storage for system equipment, and storage areas for reeled power cables and umbilicals.
5. SBSS-History
   - SBSS's history reports Bold Maverick's Brazilian telecommunications work supporting offshore oil-and-gas digitalization.
   - This is a company-reported overseas deployment reference, not evidence of unrestricted global availability or a complete ownership and charter attribution.

23.16. KDDI Cableships & Subsea Engineering Inc.

KDDI Cableships & Subsea Engineering Inc. is a KDDI-owned Japanese contractor combining cable installation, maintenance, survey, and related engineering capabilities. ■■■■ ■■■■■ ■■■■■■■■ ■■ ■■■■■■■■■ ■■■ ■■■■■■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■■■■■ ■■■■ ■■■■■ ■■■■ ■■■■■■■■■ ■■■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■■■■ These references support combined installation-and-repair participation, while power-cable procurement still requires acceptance of the particular cable and mission rather than reliance on a broad compatibility statement.

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[redacted] This is a mobilization-stage statement, not a guarantee of departure or fault restoration within the same period. Nearshore repair can involve partner-company barges, making partner availability and responsibility part of the service package.

Universal Jointing Consortium participation, component supply, and jointer training are complementary capabilities relevant to optical-cable repair. [redacted] The published service description does not establish the precise response obligations of an individual contract.

Sources & Evidence

1. Corporate Profile and Organization | KDDI Cableships & Subsea Engineering Inc.
   - KCS's corporate profile identifies KDDI ownership and submarine cable installation and maintenance activities.
   - Its listed activities also include telecommunications construction, oceanographic surveys, and related consulting.
2. KDDI CABLE INFINITY | KDDI Cableships & Subsea Engineering Inc.
   - KCS presents KDDI CABLE INFINITY for telecommunications cable construction and repair in domestic and international networks.
   - The vessel description also states power-cable compatibility; it does not establish acceptance for every power-cable project.
3. KDDI OCEAN LINK | KDDI Cableships & Subsea Engineering Inc.
   - KCS presents KDDI OCEAN LINK for optical-cable laying, burial, repair, maintenance, and recovery.
   - The vessel page identifies KCS as its owner, without establishing complete attribution of every asset used in the wider service offering.
4. Submarine Cable Maintenance | KDDI Cableships & Subsea Engineering Inc.
   - KCS describes Asia-Pacific-focused maintenance with standby ships, crews, and engineers.
   - The company states that loading required spare plant begins within xx.xx hours of a repair request and departure follows completion of loading; this is not a stated xx.xx-hour restoration guarantee.
   - The service description includes partner-company barges for some shallow-water and shore-end repairs.
5. Universal Joint | KDDI Cableships & Subsea Engineering Inc.
   - KCS identifies participation in the Universal Jointing Consortium, supply of consortium products, and jointer training.
   - The page describes consortium-certified initial, upgrade, and requalification training, supporting assessment of personnel qualifications as a capability separate from vessel access.

23.17. NTT WORLD ENGINEERING MARINE, Inc.

[redacted] The vessel-specific description of VEGA II identifies Philippine maintenance operations supported by dynamic

positioning and an ROV. These references support mission-specific selection rather than treating the fleet as interchangeable.

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VEGA II also illustrates a conversion procurement pathway. ■■■■■ ■■■■ ■■■■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■ ■■■■■■■■■■ ■■■ ■■■■■ ■■■■■ ■■■■■ ■■■■■ ■■■■ ■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■ ■■■■■ ■■■■■ ■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■ ■■■■■■■■■■■■ ■■ ■ ■■■ ■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■ ■■ ■■ ■■■■■■■■■ ■■■■■■ The fleet overview retains older VEGA wording, so vessel identity, legal ownership and operating responsibility should be confirmed from vessel-specific documentation before contracting.

Sources & Evidence

1. NTT World Engineering Marine Corporation - Cable-Laying Vessel
   - NTT associates Nagasaki-based KIZUNA with surveys, cable laying and repair, and SUBARU with surveys, laying, burial and repair.
   - The fleet overview has a VEGAII heading but retains VEGA in its descriptive text.
2. Cable-Laying Vessel VEGA II
   - The VEGA II vessel page states that it is mainly operated as a maintenance vessel in the Philippines and identifies dynamic positioning and an ROV.
   - The page identifies Batangas, Philippines, as the port of registration.
3. Launch of the Submarine Cable Laying Vessel 'CS VEGA II'
   - NTT's March xx.xx 2025 release scheduled introduction of CS VEGA II in April 2025 for Philippine and nearby international telecommunications-cable maintenance.
   - The release described Philippine registration, Filipino crew and Filipino/Japanese engineering personnel; its new-vessel wording does not independently establish the construction pathway.
4. Green Yard Kleven leverer stort ombyggingsprosjekt med fokus på bærekraft
   - Green Yard Kleven's September xx.xx 2024 announcement reported delivery of an existing vessel converted for NTT's fiber-optic cable laying and repair.
   - The announcement identifies the project as NTT VEGA II and states that VEGA II would replace VEGA.
   - Separating conversion handover from the subsequent operator introduction is an analytical interpretation of the distinct milestones.

23.18. LS Marine Solution

LS Marine Solution combines an existing coastal cable-installation asset with a separately developing seagoing newbuild. ■■■ ■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■ ■■ ■■■■■ ■■■ ■■■■■■■■■ ■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■ ■■ ■■■■■ ■ ■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■ ■■■■■■■■ ■■■■■■■ ■■ ■■■■ ■■■ ■■■■ ■■■ ■■■■■■■■■■ ■■■ ■■■■■ ■■ ■■■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■ ■■■■■■■■ Buyers should therefore assess mobilization arrangements and coastal mission acceptance rather than interpreting its positioning class as evidence of unrestricted seagoing capability.

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The proposed connection with LS GreenLink's planned U.S. cable production creates a potential integrated supply-and-installation route. ■■■■ ■■■■■ ■■■■■■■ ■■ ■■■■ ■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■ ■■■■■■■■■■■■ ■■■■■■ ■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■ ■■■■■■■■ ■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■ Near-term procurement should distinguish GL2030's demonstrated configuration from the future newbuild and confirm the marine contracting entity and project-specific responsibilities.

Sources & Evidence

1. GL2030 - DP2 Cable Laying Barge
   - LS Marine Solution's GL2030 brochure identifies the company as owner.
   - The brochure describes GL2030 as a nonpropelled cable-laying barge with a DP2 class notation, supporting separate assessment of positioning and transit arrangements.
2. LS마린솔루션, GL2030 확대 개조...대규모 해저 사업 본격 투입
   - The July xx.xx 2026 announcement reports completion of GL2030's upgrade.
   - It describes GL2030 as optimized for shallow coastal waters and distinguishes that role from the intended long-distance role of the developing newbuild.
3. TERSAN SHIPYARD HOLD STEEL CUTTING CEREMONY FOR NEXT GENERATION CABLE LAYING VESSEL NB1139
   - Tersan reported steel cutting for LS Marine Solution's NB1139 on June xx.xx 2026.
   - The intended vessel configuration includes installation of AC and DC power cables and fiber-optic cables; these are planned newbuild capabilities, not completed operational outcomes.
4. LS Marine Solution Begins Full-Scale Construction of Next-Generation Submarine Cable Laying Vessel
   - The July xx.xx 2026 announcement targets newbuild delivery in the first half of 2028.
   - It describes a proposed turnkey connection with LS GreenLink's planned U.S. commercial production in 2028.
   - Dependence on both factory commissioning and vessel acceptance is an analytical implication, not an established delivery outcome.

23.19. Taihan Cable & Solution Co., Ltd.

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Skandi Connector's transition should be assessed through transaction and deployment milestones. DOF announced a sale agreement on May xx.xx 2026 with handover planned for the third quarter of 2026. ■■■■■■■■ ■■■■■■ ■■■■ ■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■■

[redacted] A turnkey customer should verify that cable supply, transport, vessel operation and installation acceptance sit within the agreed prime scope. A charter customer retains more control over cable and project procurement, but must establish vessel availability, crewing, equipment support and interfaces with its separately appointed installation team.

Sources & Evidence

1. Taihan Cable & Solution - Submarine Cable System
   - Taihan identifies PALOS and Skandi Connector as owned cable-laying vessels and Taihan Ocean Works as the installation subsidiary operating its fleet.
   - The company dates subsidiary incorporation to July 2025 and offers cable design, manufacture, transportation and installation, with expansion into chartering.
   - Taihan describes beaching capability relevant to shallow Korean coastal waters; project suitability remains vessel- and contract-specific.
2. DOF Group ASA - Sale of vessel
   - DOF's May xx.xx 2026 announcement records an agreement to sell Skandi Connector.
   - The announcement planned delivery to the new owners in the third quarter of 2026; it establishes an announced transaction milestone rather than completed project deployment.
3. Taihan Holds Safe Operations Ceremony for CLV Skandi Connector
   - Taihan's August 2026 announcement describes a safe-operations ceremony before full-scale offshore wind deployment.
   - It identifies intended August deployment of Skandi Connector to Yeonggwang Nakwol for submarine cable burial, not completion of that assignment.

23.20. Ningbo Orient Wires & Cables Co. Ltd

[redacted] Its 2026 interim filing identifies a wholly owned engineering subsidiary in Ningbo and reports continuing marine-engineering activity. This provides a corporate link between the protected company identity and engineering delivery, while leaving individual vessel-holding and operating responsibilities to be established separately.

The filing also identifies European and Hong Kong subsidiaries and describes an international engineering-service team taking shape. These assets support an international commercial organization, but do not by themselves establish a regional maintenance base or assured vessel mobilization. [redacted]

[redacted] Separating cable supply from marine

installation preserves contractor choice but leaves the buyer coordinating cable-handling, scheduling and acceptance interfaces. A system-level award should not substitute for a vessel-specific commitment, particularly when comparing an integrated offer with an independently contracted marine package.

Sources & Evidence

1. Company Profile
   - Orient's official profile connects the Orient Cable name with Ningbo Orient Wires & Cables Co. Ltd.
   - The company describes cable-system design, manufacturing, installation and maintenance services.
   - Evaluating an integrated engineering offer separately from a dedicated vessel commitment is an analytical implication.
2. 宁波东方电缆股份有限公司 2026 年半年度报告
   - The 2026 interim report identifies 宁波海缆研究院工程有限公司 as a wholly owned subsidiary and reports continuing marine-engineering activity.
   - The filing identifies European and Hong Kong subsidiaries and describes an international engineering-service team taking shape.
   - Those disclosures establish corporate and service capabilities, not a named vessel allocation, legal vessel title or regional repair-mobilization commitment.

23.21. Hengtong Group Co., Ltd.

Hengtong's relevant capability is an integrated submarine-cable and offshore-construction proposition delivered through a group and consortium structure. ■■■ ■■■■■■■■■ ■■■ ■■■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■ ■■■■■■■■■■ ■■■■■ ■■■■■ ■■■ ■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■ ■ ■■■■■■■■ ■■■■■ ■■■■■■■■ ■■■■■ ■■■■■ ■■■■■■■■■■ ■■■■■ ■■■■■■■■ ■■■■■■ ■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■■■ The award supports a combined delivery proposition, but does not establish that every activity is performed by Hengtong itself or that the project has been completed.

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A consortium route can combine complementary cable and offshore-construction resources, but its value depends on explicit interface and acceptance responsibilities. ■■■■■■ ■■■■■■ ■■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■ ■■■■■ ■■■ ■■■■■■■■ ■■■■■ ■■■ ■■■■■■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■ Separately procuring cable and installation retains supplier choice while transferring coordination exposure to the buyer; the Hengtong brand or EPCI label alone does not settle that trade-off.

Sources & Evidence

1. Hengtong Has Secured the EPCI Contract for the Liaoning Huadian Dandong Donggang Phase I Offshore Wind Project
   - Hengtong's September xx.xx 2025 announcement reports a consortium EPCI award for Liaoning Huadian Dandong Donggang Phase I.
   - The stated scope includes cable supply, cable laying and turbine installation.
   - The consortium award does not allocate every member's obligations or establish completed delivery; verification of prime and interface responsibilities is an analytical implication.
2. Hengtong Joined GWEC as a Global Player
   - Hengtong's December xx.xx 2023 article describes submarine-cable design, manufacture, delivery and installation and states that the company has its own cable-laying vessel.
   - The disclosure supplies historical asset-participation support without naming a current vessel or resolving its holding and operating entity.

23.22. ZTT Group

ZTT combines submarine-cable supply with offshore construction using its own marine-engineering assets. [redacted] That reference supports an established marine role, not an unchanged current fleet or automatic equivalence between lifting assets and cable-laying vessels.

LanHaiLingHang represents a separate readiness question. ZTT announced its launch on August xx.xx 2026 as a self-propelled vessel described with DP2 and power-cable installation capabilities. [redacted]

Power-cable buyers can investigate ZTT's integrated construction offer against the proposed vessel, equipment and operating entity. Commitments relying on LanHaiLingHang should require formal delivery and mission acceptance, while existing marine resources require their own allocation and qualification. [redacted]

Sources & Evidence

1. Marine System Solutions - Offshore Wind Transmission Solutions
   - ZTT's offshore wind offering combines system design, submarine cables and accessories with construction using its own marine-engineering assets.
   - The stated construction scope includes cable laying and burial as well as complementary lifting and installation.
   - Distinguishing cable-laying assets from other construction resources is an analytical implication of the different stated functions.

2. Landmark Event! "ZHONGTIAN 5" Cable Ship Sailed to Offshore Site
   - ZTT's September xx.xx 2018 announcement reports ZHONGTIAN xx.xx's delivery on September xx.xx and departure for a submarine power-cable project in Dafeng.
   - This is a historical vessel-backed installation reference, not confirmation of an unchanged current fleet.
3. ZTT Successfully Launches China's Advanced Self-Propelled Cable Laying Vessel - LanHaiLingHang
   - ZTT announced LanHaiLingHang's launch on August xx.xx 2026, describing a self-propelled DP2 cable-laying vessel for submarine power-cable applications.
   - The announcement places offshore wind installation after formal delivery.
   - Launch alone does not establish formal handover, accepted mission capability or campaign availability.

23.23. NEC Corporation

NEC participates principally as an optical submarine-cable system integrator and purchaser of marine delivery capability. ■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■■■ ■■■■ ■■■■■■ ■■■■■■■■ ■■■■■ ■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■ ■■ ■■■ ■■■■ ■■■■■■■■■■ ■■■■■ ■■■■■■ ■■ ■■■■■■■■■ ■■ ■■■ ■■■■■■■■■ ■■■■■■ ■■ ■■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■ ■■ ■■■ ■■■ ■■■■■ That completed system reference supports telecommunications project delivery, but does not establish ownership of the vessels used.

NEC's published Normand Clipper arrangement separates branding, chartering and asset ownership. Its October xx.xx 2022 announcement identified Global Marine Systems Limited as charter counterparty and Solstad Rederi AS as the vessel owner at that time. ■■■ ■■■■■■ ■■■■■■■ ■■■■■■ ■■■ ■■■■ ■■■■■■■■■ ■■■■ ■■■■■■■ ■■■ ■■■■■ ■■■■■■■■■■■■ ■■ ■■■■■■■■■■■■ ■■■■■■ ■■■■■ ■■■ ■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■ ■■■■ ■■ ■■■ ■■■■■ ■■■■ ■■ ■■■■■■■■■■ ■■■■■■■■■

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Sources & Evidence

1. NEC signs long-term charter contract with Global Marine Systems Limited for optical submarine cable-laying ship
   - NEC's October xx.xx 2022 release names Normand Clipper, Global Marine Systems Limited as charter counterparty and Solstad Rederi AS as the then-owner.
   - The published charter period is September 2022 through May 2026.
   - The record does not establish continuation or replacement vessel access after May 2026.
2. The high level of commitment embodied by the NEC logo
   - NEC describes equipment manufacturing together with marine surveys, route design, installation and system delivery.
   - Its November xx.xx 2022 account distinguishes dedicated charter access from the company's system-integration and manufacturing capabilities.

3. NEC completes construction of EMCS submarine cable linking Pacific island nations
   - NEC's May xx.xx 2026 release reports completion and handover of the East Micronesia Cable System.
   - The named receiving operators serve the Federated States of Micronesia, Kiribati and Nauru.
   - System handover supports project-delivery capability but does not establish ownership or future availability of installation vessels.

23.24. VARD

VARD is a vessel design and construction supplier with power-cable and telecommunications references, rather than an operator inferred from its customers' fleets. Its Prysmian construction model allocated naval design to Norway, hull construction to Vard Tulcea in Romania, and final outfitting, commissioning and delivery to Norway. [redacted]

VARD also supplies design capability through independent shipyards. [redacted] The additional orders establish a continuing design relationship, not completed delivery of the newly ordered vessels.

[redacted] Buyer-managed equipment preserves configuration control but retains integration exposure. A broader prime package is preferable only where commissioning, cable-equipment interfaces, warranty and post-delivery support are expressly assigned; group membership does not replace those obligations.

Sources & Evidence

1. Interview with Dario Brivio
   - Prysmian describes Leonardo da Vinci as based on a VARD naval platform while Prysmian retains responsibility for cable-laying equipment.
   - The example supports distinguishing platform construction from mission-equipment accountability; procurement and support recommendations are conditional analytical implications.
2. VARD secures contract for one cable laying vessel for Prysmian Group
   - VARD's November xx.xx 2022 Prysmian contract announcement allocates design to Norway, hull construction to Vard Tulcea in Romania and final outfitting, commissioning and delivery to Norway.
   - The allocation demonstrates a distributed construction model rather than a single-site delivery perimeter.
3. VARD ONCE AGAIN PROVED WORTHY OF TRUST
   - VARD's February xx.xx 2026 announcement identifies additional Orange Marine vessels using the VARD xx.xx xx.xx design for construction at Colombo Dockyard.
   - The announcement identifies CS Sophie Germain as an earlier vessel of that design delivered by Colombo Dockyard on July xx.xx 2023.
   - The additional orders are design and construction commitments, not completed delivery references.

23.25. Ulstein Group

Ulstein Group offers cable-vessel design and engineering through Ulstein Design & Solutions, alongside shipbuilding at Ulstein Verft in Norway. Its portfolio addresses power-cable installation, fiber-optic installation, and cable maintenance, with owner-specific mission layouts, electrical integration, and site support. ■■■■■■■ ■■■■ ■■■■■■■■ ■■■■■ ■■■■■■■■ ■■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■ ■■■ ■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■

Nexans Electra provides a concrete construction reference: Nexans identifies Ulstein Verft as its builder and records operational handover on May xx.xx 2026. ■■■ ■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■■ ■■■ ■■■■■■ ■■■■■■ ■■■■■■ ■■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■■ ■■■ ■■■■■■■■■■ ■■■■■ ■■■■■■■■■■■■■ ■■■■■■ ■■ ■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■ ■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■ ■■■■ ■■■■■■■ ■ ■■■■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■ ■■■■■ ■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■ ■■■■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■ ■■ ■■■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■■ ■■■■■■■■ External-yard flexibility preserves construction-location choice, while requiring explicit allocation of responsibilities that a broader prime package may centralize.

Sources & Evidence

1. Official handover of CLV Nexans Electra
   - Nexans identifies Ulstein Verft as Nexans Electra's builder and records operational handover on May xx.xx 2026.
   - The vessel has DP3 positioning and hybrid power; Nexans distinguishes handover from the subsequent final commissioning phase.
2. Cable lay and repair
   - Ulstein offers power and fiber-optic cable-laying and maintenance designs, owner-specific configurations, engineering, electrical integration, site support, and turnkey shipbuilding.
   - Ulstein identifies its Norwegian yard and collaboration with external yards; the comparison of delivery responsibilities is a conditional procurement implication.

23.26. Colombo Dockyard PLC

Colombo Dockyard PLC offers specialized cable-vessel construction from Sri Lanka through established owner and designer relationships. ■■■■ ■■■■■■■■ ■■■■■■ ■■■■■■ ■■■■■■ ■■■■■■ ■■■■■ ■■■ ■■■■■■■■■■■■■■ ■■■■■■ ■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■ ■■■■■■ ■■■■■■■■ ■■ ■■■■■■ ■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■ ■ ■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■ ■■■■■■■■■■ ■■■■■ ■■■ ■■■■ ■■■■ ■■■■■ ■■■■■■ ■■ ■■■■■■■■■■■■■■ ■■■■■■■■■■■ Global Marine has separately contracted a fiber-optic maintenance vessel with delivery scheduled for the fourth quarter of 2029; that commitment remains a future delivery.

Mazagon Dock Shipbuilders obtained control on January xx.xx 2026. Colombo Dockyard's management reports that the parent's support in obtaining international bank guarantees enabled the Orange Marine contracts, addressing a previously constrained export-order requirement. ■■■■■■ ■■■■■■ ■■■■■■■■ ■■■■ ■■■■■■■■■ ■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■ ■■■■■■ ■■■ ■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■

[illegible]

Sources & Evidence

1. Introducing Our Next-Generation Cable Maintenance Vessel
   - Global Marine announces a signed construction contract with Colombo Dockyard for a purpose-built fiber-optic cable maintenance vessel.
   - Delivery is scheduled for the fourth quarter of 2029, rather than reported as completed.
2. VARD ONCE AGAIN PROVED WORTHY OF TRUST
   - VARD identifies Colombo Dockyard as builder for repeat Orange Marine orders using a fiber-optic maintenance design.
   - VARD records Sophie Germain's delivery from Colombo Dockyard in 2023 and describes its continuing design collaboration with the yard.
3. Colombo Dockyard PLC Annual Report for the Fifteen Months Period Ended 31st March 2026
   - The financial statements establish that Mazagon Dock Shipbuilders obtained control of Colombo Dockyard on January xx.xx 2026.
   - Management reports that parent support in obtaining international bank guarantees enabled the Orange Marine contracts after earlier constraints; buyer-specific guarantee coverage remains a contractual verification.

23.27. Damen Shipyards Group

Damen Shipyards Group offers dedicated cable-laying designs for offshore power-cable installation and repair, using a modular approach that combines common platform elements with owner-specific mission equipment. Its current offering includes hybrid propulsion and positioning options. [illegible] A standardized foundation can support customization without proving shorter completion times for an individual order. Before selection, the owner should establish the contracting yard, mission-package integration responsibility, alternative-fuel conversion scope, and support obligations; retaining equipment choice also retains coordination exposure unless transferred explicitly.

Sources & Evidence

1. The Damen CLV: a new generation of cable layer
   - Damen's October xx.xx 2024 design description combines common platform elements with client-specific mission equipment and future methanol conversion provisions.
   - It distinguishes preparation for DP2 installation from space reserved for DP3, supporting verification of installed capability rather than design reservation.

2. Offshore Carriers - Cable Laying Vessels - Damen
   - Damen offers dedicated vessels for offshore export, inter-array, and floating power-cable installation and repair.
   - The catalog describes hybrid propulsion, mission-equipment flexibility, and selectable DP2 or DP3 configurations; these descriptions are offered configurations rather than vessel-specific acceptance records.
3. The story behind the Maersk Connector's planned beaching - Damen
   - Damen records Maersk Connector's construction at Damen Shipyards Galati in Romania and delivery in February 2016.
   - The account identifies subsequent cable-carousel installation, supporting separation of platform delivery from mission-equipment completion in that example.

23.28. Royal IHC

Royal IHC participates through both integrated cable-vessel offerings and separately supplied mission systems. ■■■ ■■■■■■■■■■■ ■■■■■■ ■■■■■■■■■■■ ■■■■■■■■ ■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■ ■■ ■ ■■■■■■■■ ■■■■■■■■ ■■■ ■■■■ ■■■■■■■ ■■■■■■■ ■■■■■■■ ■ ■■■■■■■■■■■■■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■ ■■■■■■ ■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■ ■■■■■■■■■■ The same report distinguishes this vessel business from modular spread commissioning for Boskalis and mission-equipment provision to N-Sea.

A telecommunications vessel buyer can assess Royal IHC as an integrated supplier, while an owner retaining an existing or separately procured platform can investigate mission-system supply instead. ■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■ ■■■ ■■■■■■■■■■■ ■■■■■■■■■■■■■■■ ■■■■■■■■■ ■■■ ■ ■■■■■■■ ■■■■■■ ■■■■■ ■■■■ ■■■ ■■■■■■■■■■ ■■■■■ ■■■■■■■■■■■ ■■■■■■■ ■■■■■■■ ■■■■■■■ ■■■■■ ■■■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■ Broader integration may centralize interface responsibility, but preserving preferred equipment or an existing platform can require a narrower purchase and additional owner-managed coordination.

Sources & Evidence

1. Fibre optic cable lay vessels | Royal IHC
   - Royal IHC describes a tailored fiber-optic cable-vessel offering combining vessel design, mission equipment, automation, and lifecycle support.
   - Centralizing interface responsibility is a conditional implication of the proposed integrated package, not independently established performance superiority.
2. Royal IHC Annual Report 2024
   - Royal IHC reports a 2024 Optic Marine design-build-delivery award including cable-laying and burial equipment.
   - It separately reports modular cable-spread commissioning for Boskalis and mission-equipment provision to N-Sea, establishing distinct vessel and equipment delivery roles.

23.29. Shanghai Zhenhua Heavy Industries Co., Ltd.

Shanghai Zhenhua Heavy Industries Co., Ltd. has a documented cable-platform construction reference in Ndurance. Boskalis's equipment sheet names both Samsung C&T and ZPMC in the builder field for the asset constructed in 2013, and describes DP2, mooring, and beaching

capabilities. ■■■■ ■■■■■■■■■■■ ■■■■■■ ■■■■■■■■■■■■■ ■■ ■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■ ■■■ ■■■ ■■■■ ■■■■■■■■■■■■■■ ■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■

A company announcement published on April xx.xx 2026 reports the launch of a multipurpose offshore vessel built at Zhenhua Marine for CNOOC's Shenzhen marine-engineering business. ■■■ ■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■ ■■■■■■■■■ ■■■ ■ ■■■■■■■ ■■■■■ ■■■■■■■■■ ■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■ ■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■ ■■ ■■■ ■■■■■■■■ ■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■ ■■■■ ■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■ ■■■ ■■■■■ ■■ ■ ■■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■ Multipurpose capability offers employment flexibility, but its cable mission must be qualified separately rather than inferred from the broader offshore-vessel description.

Sources & Evidence

1. Ndurance - Cable Laying Vessel
   - Boskalis's Ndurance sheet lists Samsung C&T and ZPMC in the builder field and records construction in 2013.
   - The sheet describes DP2, mooring, and beaching capabilities; it does not allocate sole turnkey responsibility to ZPMC.
2. 我国自主研制的新一代深水多功能海洋工程船成功吉水
   - ZPMC's April xx.xx 2026 announcement reports launch at Zhenhua Marine of a multipurpose offshore vessel for CNOOC's Shenzhen marine-engineering business.
   - The described configuration includes DP2 and a planned powered cable-carousel arrangement; the launch announcement does not establish final cable-system commissioning or acceptance.

23.30. N-Sea

N-Sea offers contracted submarine power-cable transport, installation, repair, and EPCI execution, supported by modular cable equipment and in-house survey, diving, and remotely operated vehicle capabilities. It presents Curo as a shallow-draft cable vessel able to work using DP2 or anchors. ■■■ ■■■■■■■■■■■ ■■■■■■ ■■■■■■■■■ ■■ ■■■ ■■■■■ ■■■ ■■■■ ■■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■ ■■■■■■■■ ■■■■■■■ ■■■■ ■■■■■■■ ■■■■■■ ■■■ ■■■■■ ■■■■■■ ■■■■■■■

Altera has a project reference beyond its earlier planned commissioning timetable. ■■■■ ■■■■■■ ■■■■■■■■■ ■■■ ■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■ ■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■ ■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■■■ This supports a deployment assessment, but does not settle the formal commissioning date, asset ownership, or charter terms.

Infrastructure operators seeking repair readiness should evaluate N-Sea's proposed engineering, vessel access, jointing capability, supporting plant, and mobilization obligations together. ■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■ ■ ■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■ ■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■ ■■■■■■■■ ■■ ■■■■■■■■■■■■■ ■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■■ Buyers should distinguish procurement of an installation or

maintenance package from acquisition of the vessel and verify the assets committed to the particular campaign.

Sources & Evidence

1. Cable repair & installation - N-Sea
   - N-Sea offers submarine power-cable transport and installation, repair, and EPCI, with modular equipment and in-house survey, diving, and ROV capabilities.
   - It describes Curo as shallow-draft with DP2 or anchored operation and advertises customer-specific repair frameworks and mobilization commitments.
2. Gwynt-y-Môr offshore wind farm export cable repairs - N-Sea
   - N-Sea's Gwynt-y-Môr project account covers export-cable repairs in the Irish Sea during 2022-2025.
   - The account identifies deployment of Curo alongside externally sourced jack-up solutions, supporting assessment of the complete service package rather than the cable vessel alone.
3. Inch Cape Weekly Notice of Operations 39/2026
   - Inch Cape's notice issued September xx.xx 2026 identifies Altera for N-Sea's continuing inter-array cable-laying operations.
   - It assigns burial and supporting activities to separate vessels. The notice supports a project-deployment reference, not a formal commissioning date or ownership determination.

23.31. Caldwell Marine International, LLC

Caldwell Marine International, LLC's documented commercial role is submarine power- and fiber-optic cable installation and repair, including shore-end and inland-water work. Its Champlain Hudson Power Express reference identifies marine phases awarded by NKT and pairs Caldwell's cable-laying capability with sister company Huxted Trenchless's shore-end drilling expertise. ■■■■ ■■■■■■■■■■■ ■■ ■■■■■■■■ ■■ ■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■■■■■■ ■■ ■■■ ■■■■■■■ ■■■■■■■■

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Sources & Evidence

1. Submarine Cable Installation Services | Caldwell Marine International
   - Caldwell offers power- and fiber-optic cable installation, repair, shore-end work, and marine survey services.
   - Its Champlain Hudson Power Express project description identifies marine phases awarded by NKT and complementary cable-laying and Huxted Trenchless shore-end drilling capabilities.
2. Marine Construction Services | Caldwell Marine International
   - Caldwell's Vancouver project account identifies use of its DP2 cable-lay barge in 2009.
   - Its 2019 Potomac River account describes a sectional anchored barge selected for restricted bridge access; these historical references do not establish a complete current asset inventory.

23.32. International Cableship Pte Ltd

International Cableship Pte Ltd is best assessed as a cable-ship owning and chartering joint venture supporting regional telecommunications maintenance, rather than as the entire Global Marine operating fleet. ▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ Together, these roles connect asset provision to an established maintenance arrangement without establishing independent responsibility for every associated marine service.

For telecommunications customers and vessel-financing partners, the relevant choice is access to an identified maintenance asset and its contractual availability. ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪ ▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪ ▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ The arrangement offers an established regional maintenance context, but installation flexibility and replacement-vessel access require explicit contractual confirmation.

Sources & Evidence

1. About Global Marine
   - Global Marine identifies ICPL as a joint venture supporting SEAIOCMA repair, reinstatement, and preventive maintenance of scheduled cables.
   - Global Marine describes its wider contracting fleet separately; attributing that entire fleet to ICPL is not established by the venture description.
2. Singtel Annual Report 2026
   - Singtel's financial statements for the year ended March xx.xx 2026 identify International Cableship Pte Ltd as a Singapore joint venture with principal activities of cable-ship ownership and chartering.

23.33. Samsung C&T Corporation

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Samsung C&T's Project Lightning disclosure establishes a different role: contracted construction of converter stations and substations and supply of subsea HVDC cables in the United Arab Emirates. ▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪ ▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪

RESEARCH SAMPLE REPORT

[redacted] Its historical reference is useful for qualification discussions; neither that reference nor its subsea infrastructure scope settles the package available for a new vessel purchase.

Sources & Evidence

1. Ndurance - Cable Laying Vessel
   - Boskalis' Ndurance equipment sheet identifies Samsung C&T Corporation and ZPMC in its builder attribution and gives the construction year as 2013.
   - The builder attribution does not allocate the construction, procurement, integration, or project-management responsibilities between those parties.
2. Samsung C&T Corporation - Project Lightning Contract Disclosure
   - Samsung C&T discloses a signed Project Lightning contract covering onshore and offshore converter stations and substations and supply of subsea HVDC cables in the United Arab Emirates.
   - The disclosed infrastructure scope is distinct from a cable-laying-vessel delivery package.

23.34. Neptune Marine

Neptune Marine provides a documented Dutch-led construction route for a vessel designed for cable installation and repair, with Altera illustrating distributed platform and mission-equipment delivery. Neptune identifies a Polish partner yard for hull construction and its Merwede yard in Hardinxveld-Giessendam for accommodation construction, integration, and subsequent outfitting. [redacted]

Altera's advertised shallow-draft design combines DP2, mooring, and beaching capabilities, making Neptune relevant to buyers evaluating coastal flexibility alongside offshore cable work. These are configuration-specific design attributes, not proof of interchangeability with every unrestricted-seagoing cable vessel. [redacted]

An experienced vessel owner can use this route while retaining a preferred mission-equipment package; a buyer seeking single-prime accountability should explicitly include cross-package commissioning, acceptance, and defect responsibilities. The trade-off is customization and equipment control versus retained interface coordination. [redacted]

Sources & Evidence

1. Multi purpose shallow draft vessel “Altera”
   - Neptune identifies Altera as a multipurpose shallow-draft newbuild for N-Sea and describes a configuration combining DP2, mooring, and beaching capabilities.
   - The advertised configuration is design-specific and does not establish equivalent capability across every cable-vessel operating envelope.

2. Altera arrived at our Merwede yard in Hardinxveld-Giessendam
   - Neptune reports that Altera's hull came from a Polish partner shipyard and that its accommodation was constructed at Hardinxveld-Giessendam.
   - Neptune identifies hull-and-accommodation integration and subsequent outfitting at its Merwede yard for the N-Sea vessel.
3. POST | A fully integrated cable lay spread for N-Sea Group's new cable-laying vessel, Altera
   - MacArtney's December xx.xx 2025 material identifies collaboration with Subsea Cable Assets and Enersea for Altera's integrated cable-lay spread.
   - MacArtney identifies its contribution to the mission package, supporting separate assessment of platform and specialist equipment responsibilities.
4. Inch Cape successfully completes second offshore export cable
   - Inch Cape's September xx.xx 2026 project update reports array-cable laying by newbuild vessel Altera.
   - This project-owner confirmation establishes an installation assignment beyond the earlier construction announcement, without establishing unrelated mission outcomes.

23.35. Huisman

[illegible] A July xx.xx 2025 contract with Dong Fang Offshore establishes a firm order for a modular system intended for installation and repair configurations across existing and newbuild vessels, including VARD-built platforms. The contract establishes commercial implementation beyond a concept, but the announcement is not evidence of completed delivery or accepted performance.

Established cable-equipment use and newer architectures should be distinguished. [illegible] Its workability proposition includes supplier simulations; those claims should not be treated as independently demonstrated campaign outcomes or as proof that Huisman assumes complete-vessel delivery responsibility.

For an owner purchasing or reconfiguring a vessel, Huisman is therefore a candidate for the mission-system package, with the shipyard or other prime remaining explicitly identified. Modular deployment offers configuration flexibility, whereas a dedicated integrated arrangement prioritizes a coordinated vessel layout. [illegible]

Sources & Evidence

1. Cable-Lay Systems
   - Huisman's product portfolio distinguishes modular cable-lay systems from fully integrated systems for inter-array, export, and interconnector applications.
   - The modular offering is described as reconfigurable for vessel deployment and repair scope; compatibility and acceptance implications are analytical, not demonstrated outcomes.
2. Huisman awarded order for Cable-Lay System by Dong Fang Offshore
   - Huisman announced a signed Dong Fang Offshore modular cable-lay-system contract on July xx.xx 2025.
   - The intended configurations cover cable installation and repair across existing and newbuild vessels, including VARD-built platforms; the announcement establishes an order, not completed delivery.
3. Motion Compensated Cable Lay Vessel
   - The Damen-Huisman offering combines a Damen vessel platform with Huisman's motion-compensated cable-lay system.
   - The offering presents simulation-based workability claims, which do not establish independently demonstrated campaign outcomes or Huisman's sole complete-vessel responsibility.
4. Huisman Flex-Lay System successfully utilised on cable-lay works for floating wind turbine in China
   - Huisman's June xx.xx 2023 release reports Flex-Lay equipment aboard Hai Yang Shi You xx.xx used for a subsea power-cable assignment.
   - That reported equipment application is distinct from the later modular system and the Damen-Huisman motion-compensated architecture.

23.36. Crowley Wind Services

Crowley Wind Services contributes U.S. marine operation and crewing to a cable-lay barge arrangement developed with Nexans, rather than acting as the sole platform and cable-system supplier. ■■■ ■■■■ ■■■ ■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■ ■ ■■■■■■■■■■■■ ■■■■■■ ■■■■■■ ■■ ■■■■■■ ■■■■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■ ■■■■■■■■ ■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■ ■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■ ■■■ ■■■■■■■ ■ ■■■■■■■■ ■■■■ ■■■■■■■■■ ■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■■ ■■■■■■ ■■■■■■ ■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■■■■■ The Government Accountability Office subsequently reported the barge installing and trenching export cables at Empire Wind with supporting vessels.

The arrangement provides a realized U.S. power-cable reference and a nearshore complement to Nexans' cable ships. ■■ ■■ ■ ■■■■■■■■ ■■■■■■■■■■■ ■■■■■■ ■■■■ ■ ■■■■■■■■ ■■■■■■ ■■■ ■■■■■■■■■■■ ■■ ■■■■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■ ■■■■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■ ■■■■■■■■■■■■■■■■■■ ■■■ ■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■ ■■ ■■■■■■■■■■■■ ■■■■■■ A different cable family or mission should trigger fresh equipment and customer-acceptance review.

■■■■■■■■■ ■■■■■■■■■ ■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■■■■■■ ■■■■■■■■■■■■■■■ ■■■■■■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■ ■■■■■■ ■ ■■■■■■■■■ Access through the collaboration avoids treating every capability as an asset owned by Crowley, but introduces interfaces among the operator, cable-system partner, and vessel provider. The reported flag and crewing arrangement does not itself establish project authorization, exclusive deployment rights, or availability for another customer.

Sources & Evidence

1. Commercial Shipbuilding: Selected Offshore Wind Projects Used a Mix of U.S. and Foreign Vessels, Spurring Some Shipbuilding Investments
   · GAO identifies Marmac xx.xx with the Crowley-Nexans collaboration and reports it working at Empire Wind installing and trenching export cables with supporting vessels.
   · The reported deployment establishes a power-cable operating reference, not unrestricted future availability or equivalence across other missions.
2. Nexans and Crowley Wind Services Partner to Develop and Operate First-of-its-Kind Cable Lay Barge
   · Crowley's July xx.xx 2025 announcement identifies its operating and American-crewing role for a U.S.-flagged barge developed with Nexans and tested to Nexans specifications.
   · The announcement positions the barge as a nearshore complement to Nexans' cable ships and describes additional telecommunications and repair configurations rather than demonstrated outcomes for those applications.
3. Nexans, Crowley partnering on novel cable lay barge
   · WorkBoat's July xx.xx 2025 report identifies Marmac xx.xx Crowley's operation and American crewing, and a charter from McDonough Marine Service.
   · The dated report corroborates separate vessel-access and operating roles at the collaboration's announcement; it does not establish current charter duration or renewal rights.

23.37. IT International Telecom Inc.

IT International Telecom Inc. combines submarine-cable installation and maintenance services with a named vessel offering and Canadian cable bases. ■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■ ■■■■■■ ■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■■■ ■■ ■■■■■■■■ ■■■ ■■ ■■■■■■■■■■ ■■ ■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■ ■■■■■■ ■■ ■■■■■■■■■■■■■■■ ■■■■■■■ ■■■■■ ■■■■■ ■■ ■■■■■■■ ■■■ ■■■■ ■■■■■■■■ ■■■ ■■ ■■■■■■■■■■■■■■ ■■■■■■■ ■■ ■■■■■■■■■■ This provides a concrete commercial support footprint without establishing universal local deployment rights.

■■■ ■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■ ■■■■■■ ■ ■■■■■■■■■■■■■■ ■■■■■■■■■■■ ■■ ■■■■■■■■■■■ ■ ■■■■■■■■■ ■■■■■■■ ■■■■■■ ■■■■■■ ■■ ■■■■■■■■■■ ■■■■■■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■ ■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■■ ■■■■■■■■ A customer comparing this route with asset ownership should verify vessel reservation, access to stored spares, mobilization obligations, and acceptance responsibility. A published maintenance program is not itself a guarantee of immediate vessel availability.

IT Infinity's specifications describe worldwide operation and polar operating scope covering Alaska, Greenland, and Canadian waters, while identifying the vessel's flag as Barbados. ■■■■■ ■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■ ■■ ■■■ ■■■■■■■■■ ■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■■■ ■■■■■■■■■■■ ■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■■■ ■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■■■■■ ■■■■■ The published company name and operating locations also do not settle which entity holds the vessel or signs a particular installation, maintenance, or charter contract.

Sources & Evidence

1. Profile
   - IT's official profile uses the name IT International Telecom Inc. and offers desktop study, marine-route survey, engineering design, installation, and maintenance for submarine cable systems worldwide.
2. IT Infinity
   - IT publishes IT Infinity within its equipment portfolio, alongside IT Intrepid and IT Integrity.
   - Portfolio presentation establishes a named vessel offering, not the legal ownership or charter responsibility of each asset.
3. M/V IT INFINITY Specifications
   - IT Infinity's published specifications describe worldwide operation, polar operating scope including Alaska, Greenland, and Canadian waters, and a Barbados flag.
   - Published operating scope and flag attribution do not establish a Greenland contract, route-specific deployment authorization, or Canadian registration.
4. Maintenance
   - IT describes Sentinel Maintenance as customer-tailored and lists cable and kit storage, preventive maintenance, and refurbishment options.
   - Comparing the service arrangement with a captive repair asset is an analytical procurement option; contractual vessel reservation and mobilization obligations require confirmation.
5. Contact us
   - IT identifies its head office in Pointe-Claire, Quebec, cable bases in Halifax and Port Alberni, and an international office in Christ Church, Barbados.
   - These operating locations do not identify the vessel-holding entity or establish the counterparty for a particular contract.

23.38. Canpac Marine Services

Canpac Marine Services' published offering supports coastal power-cable and fiber-optic installation and repair through different vessel and equipment configurations. Canpac Valkyrie is presented as a DP2, ice-classed multipurpose vessel for cable burial, ROV campaigns, and coastal cable lays. ▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪ ▪▪ ▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪

Canpac also describes mobilized self-propelled DP2 cable-lay barges for coastal and near-coastal repairs, alongside diving, cable-handling, and ROV resources. ▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪ ▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪ Inland deployment concerns transferable equipment, not an assumption that the ocean-going vessels can reach every inland site.

Selection should connect the named vessel or barge to the cable family, shore access, repair scope, and required response commitment. A coordinated package can reduce separate marine-resource contracting only when the agreement covers the relevant interfaces, including third-party fault-location and acceptance responsibilities. ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪

RESEARCH SAMPLE REPORT

[redacted]

Sources & Evidence

1. CanPac Valkyrie
   - Canpac presents Valkyrie as a DP2, ice-classed multipurpose vessel used for cable burial, ROV campaigns, and coastal cable lays.
   - The stated ROV and cable applications are distinct and do not establish interchangeable deepwater capability.
2. CanPac Valour
   - Canpac presents Valour as Canadian flagged and suited to submarine-cable deployment and repair.
   - The vessel-specific flag description does not establish the registration or ownership of every asset in Canpac's offering.
3. Submarine Cable Installation
   - Canpac's installation offering covers HVDC and HVAC submarine power cables and fiber-optic submarine cables.
   - The company describes DP vessels and self-propelled DP2 barges within its installation capability.
4. Submarine Cable Repair
   - Canpac describes mobilized self-propelled DP2 cable-lay barges for urgent coastal and near-coastal repairs, alongside cable-handling and ROV resources.
   - The repair offering involves third-party testing companies and states that modular equipment can be shipped inland for lake and river projects.
   - Contractual response commitments and third-party acceptance interfaces require transaction-specific verification.

23.39. Kokosing Industrial

Kokosing Industrial participates through its Durocher Marine division, combining submarine-cable installation with marine-construction capabilities. [redacted] They do not establish the availability or accepted configuration of a vessel offered for a new assignment.

Kokosing advertises marine delivery across the Great Lakes, Atlantic, Gulf of Mexico, and Caribbean from Midwest and Mid-Atlantic bases. [redacted] Bundling those interfaces may simplify contractor coordination, but the historical references should not be treated as proof of an unrestricted deepwater configuration or a standardized vessel available for purchase.

Sources & Evidence

1. Submarine Cable Installation, Pensacola, FL - Kokosing
   · Kokosing's Gulf Power record attributes completed 2018 and 2019 submarine power-cable installations to Kokosing Industrial's Durocher Marine division and describes cable-barge use and associated shore-landing construction. The reference supports historical integrated execution, not present vessel availability. ([kokosing.biz](https://www.kokosing.biz/projects/gulf-power/))
2. Durocher Cable Brochure, September 2016
   · The September 2016 brochure reports Durocher Marine's development of a self-propelled DP2 cable-laying barge and integration of specialized mission equipment for the Block Island work. This establishes a historical integration reference, not a current certificate or deployment commitment. ([kokosing.biz](https://www.kokosing.biz/wp-content/uploads/2021/xx.xx/Durocher-Cable-Brochure-Sept-2016.pdf))
3. Kokosing is a Reliable Marine Construction Partner
   · Kokosing advertises submarine-cable installation and complementary marine construction, with Midwest and Mid-Atlantic bases serving the Great Lakes, Atlantic, Gulf of Mexico, and Caribbean. The combined-package selection implication is analytical and remains assignment-specific. ([kokosing.biz](https://www.kokosing.biz/our-expertise/marine/))

23.40.J.F. Brennan Company, Inc.

[redacted] Its advertised resources include vessels, barges, cable-handling equipment, ROV support, and project staging across the United States. This breadth makes Brennan relevant where the buyer must coordinate shore access, underwater construction, and cable protection, rather than procure a laying vessel in isolation.

A 2024 Coast Guard rule identifies Brennan construction barge #xx.xx alongside Marmac xx.xx in planned Revolution Wind cable operations in Narragansett Bay. The record provides a named project-associated asset reference, but it does not allocate principal laying responsibility to Brennan or establish completion of its contractual scope. [redacted]

Sources & Evidence

1. Submarine Cable Installation And Marine Support Services
   · Brennan advertises nearshore cable installation, burial, shore-end construction, surveys, diving, ROV support, protection, repair, and removal, supported by vessels, barges, cable-handling equipment, and U.S. staging resources. These are company offerings, not independently established project outcomes. ([jfbrennan.com](https://jfbrennan.com/services/energy-infrastructure/submarine-cable/))
2. Safety Zone; West Passage Narragansett Bay, Jamestown, RI
   · The August xx.xx 2024 Coast Guard rule identifies J.F. Brennan construction barge #xx.xx alongside Marmac xx.xx in planned Revolution Wind cable operations in Narragansett Bay. It does not establish Brennan's principal laying responsibility or completion of its contractual work. ([govinfo.gov](https://www.govinfo.gov/content/pkg/FR-2024-xx.xx-xx.xx/pdf/2024-xx.xx.pdf))

23.41. Kalypso Offshore Energy, LLC

[redacted] Its website nevertheless continues to describe development of a dedicated cable-laying vessel. Those representations do not establish a funded restart, delivered vessel, or available charter capacity.

[redacted] Cable owners evaluating the modular offering should require confirmation of completed equipment, host-vessel compatibility, reserved marine capacity, and enforceable response commitments. The model could provide flexibility without dependence on a dedicated ship, but it shifts procurement attention to equipment, vessel, and service interfaces; advertised portability alone does not establish repair readiness.

Sources & Evidence

1. Commercial Shipbuilding: Selected Offshore Wind Projects Used a Mix of U.S. and Foreign Vessels, Spurring Some Shipbuilding Investments
   · The government investigation reports that Kalypso's announced investment did not occur and that the company was no longer proceeding with vessel construction as of December 2025. This dated finding does not establish whether a subsequent restart occurred.
   ([files.gao.gov](https://files.gao.gov/reports/GAO-xx.xx-xx.xx/index.html))
2. Kalypso Offshore Energy Signs LOI With Royal IHC
   · Kalypso announced a letter of intent with Royal IHC on April xx.xx 2024 for a cable-laying-vessel initiative. The announcement establishes intent, not delivery or operational availability.
   ([kalypso-offshore.com](https://www.kalypso-offshore.com/post/press-statement-new-partnership-royalihc))
3. Assets | Kalypso-Offshore
   · Kalypso's assets page continues to describe cable-laying-vessel development and separately states that design and build of its Modular Cable Repair Kit are being advanced. The kit is presented for suitable host vessels or barges; delivery and demonstrated readiness are not established by that description.
   ([kalypso-offshore.com](https://www.kalypso-offshore.com/assets))
4. Services | Kalypso-Offshore
   · Kalypso advertises cable installation, repair and maintenance frameworks, and transportable repair equipment for vessels of opportunity. The publication treats these as offered services and requires contractual and asset verification rather than accepting advertised response benefits as demonstrated performance.
   ([kalypso-offshore.com](https://www.kalypso-offshore.com/services))

23.42. JMS Naval Architects

JMS Naval Architects provides vessel engineering rather than an installation-service proposition. [redacted]

[redacted] These references demonstrate experience with cable-related platform and structural interfaces, without establishing subsequent delivery of the Transmission Developers designs.

[redacted] This route preserves buyer control over requirements and yard selection, but it leaves construction, mission-equipment supply, and final acceptance with separately identified parties unless the contract allocates them otherwise. A new cable-specific engagement should establish applicable design references, approval responsibilities, and the boundary between engineering support and delivery accountability.

Sources & Evidence

1. 2019 Newsletter - JMS Naval Architects
   - JMS's 2019 newsletter documents cable-barge design for Transmission Developers Inc., including contract drawings, shipyard specifications, canal draft constraints, and provision for later conventional deck-barge use. It also documents Caldwell Marine gantry-barge engineering. The design account does not establish subsequent delivery of the Transmission Developers barges. ([jmsnet.com](https://www.jmsnet.com/wp-content/uploads/2020/xx.xx/2019.pdf))
2. Barges, Dry Docks, and Workboat Design - JMS Naval Architects
   - JMS offers complete vessel-design packages, shipyard solicitation support, technical bid evaluation, and optional owner's-representative construction oversight. Separately allocating construction and mission-equipment accountability is an analytical procurement implication of this engineering-service scope. ([jmsnet.com](https://www.jmsnet.com/dbw/))

23.43. McDonough Marine Service

[redacted] Dated July 2025 reporting identifies McDonough as the charter provider for Marmac xx.xx while the Nexans project announcement attributes the cable-delivery collaboration to Nexans and Crowley. This separates the platform lessor's contribution from the cable-system supplier's mission expertise and the operating arrangement.

McDonough's fleet landings and dock-space offering provide a U.S. mobilization footprint, including Gulf Coast and East Coast locations. A contractor seeking a configurable barge can assess charter access as an alternative to purchasing a hull, but an ordinary deck-barge specification is not an accepted cable-laying configuration. [redacted]

Sources & Evidence

1. Nexans, Crowley partnering on novel cable lay barge
   · July xx.xx 2025 reporting identifies McDonough Marine Service as Marmac xx.xx's charter provider. This supports the dated lessor role, not legal asset title or continuing availability. ([workboat.com](https://www.workboat.com/offshore/nexans-crowley-partnering-on-novel-cable-lay-barge))
2. ABS Ocean Barges - Over Sized Open Ocean Barges (ABS) | McDonough Marine Service
   · McDonough describes ABS-classed ocean barges offering open deck space and shallow-port access. These platform attributes support evaluating configurable marine capacity but do not establish an accepted cable-laying mission package. ([mcdonoughmarine.com](https://www.mcdonoughmarine.com/ocean-barges.html))
3. Barge Dock Space & Fleeting | McDonough Marine Service
   · McDonough lists U.S. fleet landings across Gulf Coast and East Coast locations and dock-space and fleeting services in Channelview, Texas, and Harvey, Louisiana. The footprint supports a mobilization-access proposition, not a promise of cable-barge availability. ([mcdonoughmarine.com](https://www.mcdonoughmarine.com/fleeting-and-dock-space.html))
4. Nexans partners with Crowley Wind Services to develop first-of-its-kind U.S. cable lay barge
   · Nexans's July xx.xx 2025 announcement identifies its cable-barge collaboration with Crowley and reports support for Empire Wind. It supports distinguishing the mission and operating collaboration from McDonough's separately reported charter-provider role. ([nexans.us](https://www.nexans.us/en/newsroom/news/details/2025/xx.xx/Nexans-Partners-with-Crowley-Wind-Services-to-Develop-First-of-its-Kind-U.S.-Cable-Lay-Barge-.html))

23.44. LAD Services

LAD Services offers custom new-barge construction, in-house engineering, structural fabrication, drydock repair, and topside repair from Louisiana. ■ ■■■■■■■■■ ■■■ ■■■■ ■■■■■■■ ■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■ ■■■■■■■■■■ ■■ ■■■■■■ ■■■■ ■■ ■■■ ■■■■■■■■■ ■■■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■ ■■ ■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■ These references support cable-barge yard participation, while leaving the legal contracting entity and precise allocation of hull construction, outfitting, and mission-equipment integration to be confirmed.

For a cable-vessel owner or installation contractor, LAD's supported role is a fabrication and outfitting counterpart within a defined delivery package. Its construction and repair offerings provide a basis for evaluating both a purpose-built barge and work on an existing platform. ■■■■■■■■■ ■■■■■■ ■■■■■■ ■■ ■ ■■■■■■■■■■■■■■ ■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■■ ■ ■■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■ ■■■■■■ ■■■■■■■ ■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■ ■■■■■ ■■■■■■■ ■■■■■ ■■■■■■■■■■■■■■ ■■■■■■ ■■ ■■■■■■■■ ■■■■ ■■■■■ ■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■ ■■■ ■■■ ■■■■■■ ■■■■■■■■■ ■■■■■ ■■■■■ ■■■ ■■■■■■■■■ ■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■ ■■ ■■■■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■

Sources & Evidence

1. Nexans, Crowley partnering on novel cable lay barge
   · The same reporting identifies LAD Shipyard in Morgan City as Marmac xx.xx's construction and outfitting yard. It corroborates a dated yard event without resolving the legal contracting identity or detailed equipment-integration responsibilities. ([workboat.com](https://www.workboat.com/offshore/nexans-crowley-partnering-on-novel-cable-lay-barge))

2. Our Marine & Barge Services | LAD Companies
   · LAD Services advertises custom new-barge construction, drydock and topside repair, steel processing, and in-house engineering for marine equipment and structures, with a Morgan City, Louisiana location. These offerings support fabrication and outfitting evaluation, not an assumed complete cable-vessel prime scope. ([ladcompanies.com](https://ladcompanies.com/services/))
3. Laying the Groundwork: Meet the Barge Delivering All-American Energy
   · Oceantic Network's September xx.xx 2025 account attributes Marmac xx.xx's outfitting in Morgan City to LAD Services. This is a dated cable-barge participation reference, not evidence of a continuing orderbook or complete-vessel warranty obligations. ([linkedin.com](https://www.linkedin.com/pulse/laying-groundwork-meet-barge-delivering-all-american-energy-0fbje/))

23.45. Dominion Diving Ltd.

Dominion Diving Ltd. provides Halifax-based marine support combining multipurpose vessels, barges, diving, ROVs, and waterfront staging. ■■■ ■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■ ■■■ ■■■■ ■■■■ ■■■■■■■■ ■■■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■ ■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■ These assets make it relevant to cable campaigns needing local marine access and underwater support, without demonstrating that every listed vessel has a cable-laying configuration.

A provincial record published August xx.xx 2026 documents Tancook Islands fiber-cable supplies being loaded at Dominion's Halifax Harbour location on July xx.xx. ■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■ ■■■■■■■■■■■■■ ■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■ ■■■ ■ ■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■ ■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■ ■■■■ ■■■■■■ ■■■■■■■■■■ ■■■■■■■ ■■ ■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■ ■■■■■■■■ ■■■■■■■ ■■ ■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■■■ Combining local support may reduce handoffs; it does not replace the need to secure the principal installation asset.

Sources & Evidence

1. Company Profile - Dominion Diving
   · Dominion identifies its Halifax Harbour base, multipurpose vessels, barges, ROVs, and supporting maintenance workshops. The profile uses these company-described assets to establish a marine-support proposition without claiming universal cable-laying capability. ([dominiondiving.com](https://dominiondiving.com/company-profile/))
2. Facility - Dominion Diving
   · Dominion's Duck Rock facility offers staging, loading and unloading, storage, vessel and equipment handling, and maintenance workshops. The resulting regional mobilization and support implication is analytical, not a demonstrated principal-installation outcome. ([dominiondiving.com](https://dominiondiving.com/facility/))
3. Our Fleet - Dominion Diving
   · Dominion's official fleet listing includes Warrior among its multipurpose support vessels. Listing the vessel does not establish its current cable-laying configuration or legal ownership. ([dominiondiving.com](https://dominiondiving.com/services/our-fleet))

4. Offshore Renewables - Dominion Diving
   · Dominion advertises seabed surveys and cable-routing support for offshore renewables. The offering supports a defined survey and marine-support role rather than an inference of principal cable laying. ([dominiondiving.com](https://dominiondiving.com/services/offshore-renewables/))
5. Loading Supplies for Tancook Islands High-Speed Internet Project
   · The provincial record published August xx.xx 2026 identifies July xx.xx loading of Tancook Islands undersea-cable supplies onto a barge at Dominion Diving in Halifax Harbour. It establishes a staging-location connection, not Dominion's contractual responsibility for principal laying. ([news.novascotia.ca](https://news.novascotia.ca/en/2026/xx.xx/xx.xx/loading-supplies-tancook-islands-high-speed-internet-project))

23.46. DEMAR Instaladora y Constructora S.A. de C.V.

DEMAR Instaladora y Constructora S.A. de C.V. advertises engineering, procurement, construction, maintenance, and installation for Mexico's oil-and-gas infrastructure, explicitly listing submarine-cable laying separately from submarine pipelines. Its material-resources offering describes prefabrication yards, a company quay, and offshore support resources serving the Sonda de Campeche. ■■■ ■■■■ ■■■■■ ■■■■■ ■■ ■■■■■■■■■ ■■■■ ■■■■■■ ■■■■■■■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■ ■■■■ ■■■■■■■■■■■ ■■■■ ■■■ ■■■■■■■■■ ■ ■■■■■■■■■■■■■■ ■■ ■■■■■■ ■■■■■■■■■■■■■■

DEMAR can therefore be evaluated for cable work integrated with industrial offshore construction, rather than having its general marine resources treated as interchangeable with a specialized cable vessel. A buyer considering a broad construction package should require a named laying platform, the applicable cable-equipment package, relevant executed cable references, and clear responsibility for marine installation and infrastructure interfaces. ■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■ ■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■ ■■■ ■■ ■■■■■■■■ ■■■■ ■■■■■■■■■ ■■ ■■■■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■ ■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■ ■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■ ■■■■■■■■■■■■ ■■■■■■ ■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■■

Sources & Evidence

1. Nosotros - DEMAR Instaladora y Constructora S.A. de C.V.
   · DEMAR describes Mexican oil-and-gas engineering, procurement, construction, maintenance, and installation, explicitly listing submarine-cable laying separately from submarine pipelines. This supports its industrial cable-contracting offering, not equivalence between pipeline and cable-vessel capability. ([demar.com.mx](https://www.demar.com.mx/nosotros/))
2. Recursos Materiales - DEMAR Instaladora y Constructora S.A. de C.V.
   · DEMAR describes prefabrication yards, a company quay, offshore support in the Sonda de Campeche, and Sara Maria's crane, accommodation, and helipad features. These support logistics and construction-resource analysis but do not establish a cable-laying equipment package. ([demar.com.mx](https://www.demar.com.mx/recursos-materiales/))

23.47. Sustentos Industriales Y Marítimos, S.A. De C.V.

Sustentos Industriales Y Marítimos, S.A. ■■ ■■■■■ ■■■■■■■■■ ■■ ■■■■■■ ■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■ ■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■

■■■■■■■■■■■ ■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■■■■■■ ■■■■■ These capabilities support a defined installation-work package, but do not establish the configuration or contractual control of a dedicated laying ship or barge.

A marine installer procuring Mexican underwater works can evaluate SUINMA for engineering and diver-supported scope, subject to relevant project references and customer qualification. Before assigning principal installation responsibility, the buyer should establish the named platform, its availability, and responsibility for cable handling, acceptance, and defects. ■■■■■■■■■ ■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■ ■■ ■■■■■■■■ ■ ■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■■■ ■■■■■■■■ ■■■■ ■■■ ■■■■■ ■■■■■■■■■■ ■■ ■■■■■■■

Sources & Evidence

1. SUINMA Empresa especializada en el area maritima, industrial, seguridad e ingeniería.
   · SUINMA advertises engineering for submarine power- and fiber-optic cable laying and diving services for underwater cable protection; the page identifies the captured legal name and Veracruz location. It does not identify a laying vessel. ([suinma.com.mx](https://suinma.com.mx/M15.html))
2. SUINMA Empresa especializada en el area maritima, industrial, seguridad e ingeniería.
   · SUINMA's services presentation includes submarine energy- and fiber-optic cable laying and identifies Sustentos Industriales Y Marítimos, S.A. De C.V. in Veracruz, Mexico. Package-versus-platform implications are analytical. ([suinma.com.mx](https://suinma.com.mx/index.html))

23.48. AQUANTICA Proyectos Marinos

AQUANTICA Proyectos Marinos advertises submarine fiber-optic and power-cable supervision, inspection, and maintenance, alongside route assessment, government and environmental permitting coordination, deployment-related work, and final cable-position records. Its oceanographic offering includes bathymetry and hydrodynamic modeling. ■■■ ■■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■ ■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■ ■■■■■■ ■■■ ■■■■■■■■■ ■■■■ ■■■■■■■■ ■ ■■■■■■■ ■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■ ■■■■■■■■■

For buyers coordinating coastal and offshore-to-shore works, AQUANTICA's commercial proposition is the combination of route studies, permitting coordination, and underwater services. Its description of a cable ship within the installation process does not establish ownership or assured access to a named vessel. ■■■■■■ ■■■■■■ ■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■ ■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■ ■■■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■ ■■■■■■ ■■■■■ ■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■■■■ ■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■

Sources & Evidence

1. Supervisión, Inspección y Mantenimiento de Cableados Submarinos | Aquantica
   · AQUANTICA advertises submarine fiber-optic and power-cable supervision, inspection, maintenance, route assessment, permitting coordination, deployment-related work, and final position records. Its installation description mentions a generic cable ship without identifying ownership or a named asset. ([aquantica.com.mx](https://www.aquantica.com.mx/servicios-costeros/supervision-inspeccion-y-mantenimiento-de-cableados-submarinos))

2. Estudios Oceanográficos | Aquantica Cancún
   · AQUANTICA offers bathymetry and hydrodynamic modeling and identifies its principal Cancún location and additional branches in Mérida and Ensenada. Office presence does not establish individual project authorization. ([aquantica.com.mx](https://www.aquantica.com.mx/estudios-oceanograficos))

23.49. Oceaneering

[redacted] Separately, Ocean Intervention is offered in North America as a U.S.-flagged, DP2 multi-service vessel supporting flowline and umbilical installation. That vessel offering should not be treated as proof of an equivalent principal power- or telecommunications-cable installation package.

A vessel owner retaining control of its cable mission can evaluate Oceaneering for ROV and survey functions rather than transferring the entire installation campaign. The attraction is access to specialist subsea capability on an existing platform; the trade-off is continued responsibility for integrating the ROV package with the vessel and installation contractor. [redacted]

Sources & Evidence

1. Ocean Intervention | Multi-Service Vessel (MSV) | Oceaneering
   · Oceaneering describes Ocean Intervention as a U.S.-flagged, DP2 multi-service vessel offered in North America for flowline and umbilical installation and related subsea services. This page does not establish a principal power- or telecommunications-cable installation package. ([oceaneering.com](https://www.oceaneering.com/products/ocean-intervention/))
2. The Isurus™ ROV reduces cost and carbon footprint while shortening project schedule | Case Study | Oceaneering
   · Oceaneering's Isurus case study describes deployment on a customer's cable-laying vessel, including touchdown monitoring and surveys. Reported outcomes are supplier claims, not independently established comparative results. ([oceaneering.com](https://www.oceaneering.com/case-studies/oceaneerings-innovative-isurus-rov-reduces-cost-and-carbon-footprint-while-shortening-project-schedule/))
3. Isurus ROV | Work Class System | Oceaneering
   · The Isurus product offering identifies cable-related renewables work, including pre- and post-lay surveys. Procuring this specialist function separately from principal installation is an analytical option, subject to vessel integration and acceptance. ([oceaneering.com](https://www.oceaneering.com/rov-services/next-generation-subsea-vehicles/isurus-rov/))

23.50. Edison Chouest Offshore

Edison Chouest Offshore combines mission-specific platform construction and conversion through yards including LaShip and Tampa Ship with subsea engineering, project management, and ROV services through C-Innovation. [redacted] For a cable-vessel buyer, these are relevant platform and support

capabilities, but a proposal still needs a separately defined cable mission package and acceptance scope.

Related-company access must be distinguished from assets contracted directly through ECO. ■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■ ■■ ■■■ ■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■■ ■■■■■ ■■■■■■■■■■ ■ ■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■ ■■■■■■■ ■■■ ■■■■■■■■ The May 2024 announcement targeted delivery in the first quarter of 2027; the February xx.xx 2026 milestone was a hull launch, not completed operational acceptance.

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Sources & Evidence

1. ECO | Shipyards
   · ECO identifies affiliated shipyards offering new construction, repair, conversion, and refit services, including LaShip, Tampa Ship, and Navship in Brazil. A cable-specific mission package is not established by general yard capability alone. ([chouest.com](https://www.chouest.com/shipyards.html))
2. ECO | Subsea Operations
   · ECO identifies C-Innovation as its subsea-services business providing ROV services, engineering, and project management. These capabilities support the profile's platform-and-subsea orientation, not a claim of completed cable-vessel delivery. ([chouest.com](https://www.chouest.com/subsea.html))
3. Our history - Island Offshore
   · Island Offshore identifies the Ulstein and Chouest families as its majority owners. This establishes a family-linked relationship, not ECO's consolidated ownership or automatic control of individual vessels. ([islandoffshore.com](https://www.islandoffshore.com/our-history))
4. Island Offshore with major investment in anniversary year
   · Island Offshore's May xx.xx 2024 order announcement describes Island Evolution as a hybrid DP2 construction vessel intended for missions including cable laying and repairs, with delivery targeted for the first quarter of 2027. These are announced configuration and delivery intentions. ([islandoffshore.com](https://www.islandoffshore.com/our-stories/island-offshore-with-major-investment-in-anniversary-year))
5. NB 977 Island Evolution successfully launched
   · Island Offshore reported Island Evolution's launch on February xx.xx 2026 and described subsequent outfitting and transfer activities. The event establishes a construction milestone, not completed operational acceptance. ([islandoffshore.com](https://www.islandoffshore.com/our-stories/launch-of-nb-xx.xx-island-evolution))

23.51. Blue Marine Telecom

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across the Santos and Campos optical-network assignments and attributes the vessel to partner SB Submarine Systems, rather than to Blue Marine Telecom.

This record demonstrates project participation with specialized partner-provided vessel capability, not an independently owned cable-ship fleet. ■■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■■ ■■■■■■■■ ■■■■■■■ ■■■ ■■■■■ ■■■ ■■■■■■■■■■ ■■■ ■■■■ ■■ ■■■ ■■■■■■■■ ■■■ ■■■ ■■■■■■■■■■ ■■■■■ ■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■ ■■■■■■■■■■■■ ■■■■■■■ ■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■ ■■■ ■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■ ■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■■■ ■■■■■■■■■■■■ ■■■■■ ■■■ ■■■■■■■■■■■■■■■■■■ ■■■■■ ■■ ■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■ ■■ ■■■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■■■■ Completion of a vessel's assignment does not establish completion of the entire network or continuing availability of that ship.

Sources & Evidence

1. SBSS - Fleet
   · SBSS markets Bold Maverick within its own fleet as a vessel specializing in submarine cable installation and maintenance. This corroborates separate vessel attribution rather than Blue Marine Telecom fleet ownership. ([sbss.com](https://www.sbss.com/en/site/asset_details/xx.xx))
2. Zmax recebe navio para instalações em águas profundas - ZMAX Group
   · Zmax's May xx.xx 2023 announcement identifies Blue Marine Telecom as the subsidiary responsible for the Santos-basin optical-network project and Blue Amazon as a separate group marine-engineering contributor, with Puerto Real mobilized for offshore installation activities. ([zmaxgroup.com.br](https://zmaxgroup.com.br/zmax-recebe-navio-instalacoes-aguas-profundas/))
3. Bold Maverick conclui seu trabalho na instalação da Malha Óptica Submarina de Campos - ZMAX Group
   · Zmax's May xx.xx 2025 announcement reports completion of Bold Maverick's assigned work for Blue Marine Telecom across the Santos and Campos optical-network projects and identifies the ship as belonging to partner SBSS. It does not establish completion of the entire network or continuing ship availability. ([zmaxgroup.com.br](https://zmaxgroup.com.br/bold-maverick-conclui-trabalho-instalacao-malha-optica-submarina-campos/?utm_source=openai))
4. SBSS-Projects
   · SBSS identifies Bold Maverick on the Brazilian Malha Óptica campaign during 2023-2025 and names HMN Tech as its customer. The differing company roles support verifying the actual prime, operator, and contractual responsibility chain. ([sbss.com](https://www.sbss.com/en/site/projects_list/xx.xx))

23.52. Prates Navegação e Logística

Prates Navegação e Logística has a documented riverine communications-cable installation role in Brazil's Amazon region. The company describes a floating platform developed for the Norte Conectado program. ■■■■■ ■■■■■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■ ■■■■■■■■■ ■■■■■■ ■■■■ ■■ ■■■ ■■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■ ■■■ ■■■■ ■■■■■ ■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■ ■■■■■■■■ ■ ■■■■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■ ■■■■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■ ■■■■■■■■■ ■■■■■■■■■

Amazonian telecommunications buyers can evaluate Prates for a combined platform, cable-deployment, and regional-logistics package. ■■■ ■■■■■■■ ■■ ■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■ ■■■■■ ■■■■■■■ ■■■■■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■■■■■■■■■■■ ■■■■■■■■■■■■■■■■ ■■■■■■ ■■■■■■■■■■■ ■■■■■■ ■■■■■■■■ ■■■

[redacted] Bundling riverine execution with logistics may reduce interfaces, but does not automatically create single-prime responsibility or establish interchangeability with seagoing power-cable vessels.

Sources & Evidence

1. Cases - Prates Navegação e Logística
   - Prates's Norte Conectado case description states that the company installs fiber-optic cable using a floating platform it developed, establishing a company-reported riverine installation offering. ([prates.log.br](https://prates.log.br/cases))
2. Anexo VI - Especificações da Infraestrutura da Infovia 00 Macapá-Santarém, Piloto do Programa Norte Conectado
   - RNP's Infovia xx.xx documentation names COMERCIO E NAVEGACAO PRATES LTDA as the executing company for navigation, handling, installation, protection, maintenance, and warranty services. RNP retained environmental-licensing responsibility, supporting a distinction between execution and whole-project accountability. ([plataforma.rnp.br](https://plataforma.rnp.br/arquivos/documents/ANEXO%20VI%xx.xx-%20Especificacoes%20da%20Infraestrutura%20da%20Infovia%2000.pdf?VersionId=GGmayDsdQC.AoXHlLqr2Gdp7IdAN9u_h))

23.53. Superfície Engenharia

[redacted] Its complementary capabilities include hydrographic surveys and port-related engineering. The Porto Alegre-based company also advertises vessel rental, including tugboats, barges, and floating accommodations, with crews and onboard equipment included.

For a crossing buyer, the distinction is between procuring a marine-platform package and commissioning engineering plus execution. [redacted] Buyers should identify the proposed platform, cable-related equipment, operating permissions, and division of responsibility before treating either procurement route as an accepted installation solution.

Sources & Evidence

1. Superfície Engenharia
   - Superfície Engenharia advertises submarine and river cable-crossing engineering and execution of data- or power-cable crossings in rivers, lakes, and estuaries, together with hydrographic and port-related services from Porto Alegre. ([superficie.eng.br](https://superficie.eng.br/superficie.php))
2. Superfície Engenharia
   - Superfície offers rental of tugboats, barges, and floating accommodations with crews and onboard equipment. Comparing platform rental with engineering-and-execution procurement is an analytical implication; the rental listing does not establish a cable-specific accepted configuration. ([superficie.eng.br](https://superficie.eng.br/aluguel-embarcacoes.php))

23.54. VSP Offshore Underwater Service

VSP Offshore Underwater Service advertises fiber-optic cable laying within underwater engineering, alongside inspection and other marine works. Its stated working environments include open sea, port areas, rivers, and lakes. ■■■ ■■■■■■■ ■■■■ ■■■■■■■■■ ■ ■■■■■■■ ■■■■■ ■■■ ■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■ ■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■ ■■■ ■■■■■■ ■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■■■ ■■■■ ■■■■■■■■■■■ ■■■■■■■■ ■ ■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■ ■■■■ ■■■■■ ■■■■■■■■ ■■■■■ ■■ ■■■■■■■■■■ ■■ ■ ■■■■■ ■■■■■■

A telecommunications contractor requiring cable work with underwater inspection can evaluate a combined VSP package after confirming delivered references, the named platform, and cable acceptance responsibilities. ■■■ ■■■■■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■ ■■■ ■■ ■■■■■■■■■■■ ■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■ ■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■ ■■■■■ ■■■■■■■■■■■■■ ■■■ ■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■ ■■■ ■■■■■■■■ ■■■■■ ■■■■■■ ■■■■■■■ ■■■ ■■■■■ ■■■■■■■■ Advertised operating environments do not establish vessel-specific authorization or unrestricted deployment rights.

Sources & Evidence

1. OBRAS SUBAQUÁTICAS | VSP OFFSHORE
   · VSP offers fiber-optic cable laying within underwater engineering and lists open-sea, port, river, and lake environments. The offering does not establish named-vessel configuration or unrestricted deployment rights. ([vspoffshore.com.br](https://www.vspoffshore.com.br/obras-subaquaticas))
2. EMBARCAÇÕES DE APOIO | VSP OFFSHORE
   · VSP describes a support-vessel fleet serving diving operations and cargo or passenger transport. These are complementary marine capabilities, not proof that the support craft are accepted cable-laying vessels. ([vspoffshore.com.br](https://www.vspoffshore.com.br/embarcacoes-de-apoio))
3. Operações Subaquáticas | VSP Offshore Underwater Service | Brasil
   · VSP's detailed service materials identify the full company name, Rio Grande location, submarine cable-laying services, support vessels, and support-barge services. Hull inspection and vessel repair are separately described and do not establish cable-repair-vessel capability. ([vspsite246.wixsite.com](https://vspsite246.wixsite.com/vspoffshore))

23.55. BENTOS

BENTOS is a Chile-based candidate for survey-led cable-project support, but dedicated-vessel supply requires separate qualification. Its advertised services connect marine surveys, route definition, logistics, laying and repair. ■■■ ■■■■■■■ ■■■■ ■■■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■■ ■■ ■■■■■■■ ■■■■■■■■■■■■■ ■■■ ■■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■ ■■■■■■ ■■■■■■■■■■■■■ ■■■ ■ ■■■ ■■■■■■■■■■■

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[redacted] Before assigning principal laying responsibility, require an identified installation platform, deployment rights, cable-handling scope, relevant recent references and the responsible legal counterparty. Survey and support assets alone do not establish a dedicated cable-laying configuration.

Sources & Evidence

1. Servicios de Bentos
   · BENTOS advertises marine surveys, cable feasibility and route definition, logistics, laying, repair and underwater inspection services, with a Santiago location. ([bentos.cl](https://bentos.cl/esp/services.php))
2. Embarcaciones de Bentos
   · The company fleet page identifies BENTOS Surveyor as a coastal vessel and BENTOS Explorer as an ocean-going tug/support vessel, supporting the distinction between published support assets and an established cable-laying configuration. ([bentos.cl](https://bentos.cl/esp/vessels.php))
3. CV BENTOS Cables Submarinos (Enero 2017)-esp
   · The January 2017 company document describes historical Chilean communications- and power-cable participation, including installation-ship preparation, logistics, installation and maintenance involvement. It does not establish vessel availability for a new assignment. ([bentos.cl](https://www.bentos.cl/esp/archivos/CVBENTOSCablesSubmarinos%28Enero2017%xx.xx-esp.pdf))

23.56. GeoMares S.A.S.

GeoMares S.A.S. offers a Colombian shore-end and seabed-protection package combining route studies, landing, installation, burial and maintenance. [redacted]

For an international cable prime requiring Colombian landing work, GeoMares presents a potential local execution and permission-coordination counterparty. [redacted] Equipment ownership should not be treated as vessel ownership, and advertised maintenance responsiveness should be converted into explicit mobilization obligations before reliance.

Sources & Evidence

1. Cables Submarinos: Estudios de Ruta y Enterramiento - Geomares
   · GeoMares describes route studies, landing, installation, burial and maintenance, owned cable-handling and burial equipment, and Bogotá and Cartagena offices. ([geomares.co](https://geomares.co/cables-submarinos/))
   · The company states that it holds a Colombian operating license and assists with DIMAR and ICANH permissions; the page does not independently establish license scope, project approval or vessel ownership. ([geomares.co](https://geomares.co/cables-submarinos/))

2. Proyectos realizados: Estudios Geofísicos, Levantamiento Batimétrico - Geomares
   · The undated company project list includes SAC SEG-H cable installation in Buenaventura and Globenet post-repair cable burial in Salgar, supporting a company-reported installation and protection role beyond surveys. ([geomares.co](https://geomares.co/proyectos/))

23.57. Power Sub Link SA (PSL)

Power Sub Link SA (PSL) presents ship-based and portable-barge capabilities suited to different procurement questions. ▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪ ▪▪▪ ▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪ ▪▪ ▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ Its MCB1 modular barge is described as transportable to remote, inland and shallow-water locations.

The 2014 Cartagena PCCS project account reports deploying the company's own MCB1 for shore-end installation and protection. That is a historical asset-specific reference, not confirmation of present ownership or availability. ▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪ ▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪

Sources & Evidence

1. About | PSL
   · PSL's own description uses Power Sub Link SA (PSL-MT), lists a Greek contact base, and describes route engineering, installation, protection, maintenance and decommissioning services. This establishes commercial name usage, not independent registry confirmation. ([powersublink.com](https://powersublink.com/about/))
2. CLV OCEAN LINK | PSL
   · PSL's October xx.xx 2022 vessel description identifies OCEAN LINK as a DP2 cable-laying vessel configured for power-cable and inter-array installations, with facilities for smaller fiber-optic installations. It is a company configuration description rather than a current acceptance certificate or availability commitment. ([powersublink.com](https://powersublink.com/assets/fleet/clv-ocean-link-xx.xx/))
3. MCB I Modular Barge | PSL
   · PSL describes MCB1 as a modular shallow-draft cable-installation barge designed for transport to remote areas, inland waters, estuaries and rivers. These characteristics support a distinct access-oriented qualification question from ship-based offshore work. ([powersublink.com](https://powersublink.com/assets/fleet/mcb-i-modular-barge/))
4. Submarine Cable Lines - Year 2014 | PSL
   · The 2014 project archive reports that PSL-MT performed PCCS shore-end installation and protection in Cartagena for Alcatel-Lucent using its own specialized MCB1 cable-lay barge. This is a historical company-reported deployment, not proof of present asset control. ([powersublink.com](https://powersublink.com/projects/submarine-cable-lines-year-2014/))

23.58. LEAD Marine Contractors Limited

LEAD Marine Contractors Limited advertises reel-lay pipe and cable services using an anchored heavy-lift crane-barge arrangement from Trinidad and Tobago. ■■■ ■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■ ■■■■■■■■■■■■ ■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■ ■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■ ■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■ ■■■■■ ■■■■ ■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■ ■■■■■ ■■ ■■■■■■■■■■ ■■ ■ ■■■■■ ■■■■ ■■■■■■■ These documents establish identifiable construction platforms, but do not attribute an installed cable-laying spread to a particular named barge.

A buyer combining cable work with platform, pipeline or lifting requirements can request qualification of a consolidated regional package. ■■■ ■■■■■■■■■■■■ ■■ ■ ■■■■■■■■■■ ■■■■■■ ■■■■ ■■■■■■■■■ ■■■■■■ ■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■ ■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■■■■■■ ■■■■ ■■■ ■■■■■■■■■■■■ ■■■ ■■■■ ■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■■■■■ ■■■■■ ■ ■■■■■■ ■■■■■■■■■ ■■ ■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■ ■■ ■■■ ■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■ Asset availability and the scope of principal cable-installation responsibility should be established before an award.

Sources & Evidence

1. Oil & Gas - LEAD Marine Contractors Limited
   · LEAD advertises reel-lay pipe and cable services using a heavy-lift crane barge with an anchor spread, and describes a Trinidad and Tobago fabrication yard. The offering does not nominate a particular cable-equipped barge. ([leadmarine.org](https://www.leadmarine.org/markets/oil-gas/))
2. LEAD Marlin - Heavy Lifting/Pile Driving Crane Barge
   · The LEAD Marlin specification describes a heavy-lifting and pile-driving crane barge with an anchoring system. It does not identify an installed cable-laying spread in its equipment description. ([leadmarine.org](https://www.leadmarine.org/pdf/Specification-Sheet-LEAD-Marlin-Crane-Barge.pdf))
3. LEAD Moray - Cargo Deck Barge
   · The LEAD Moray specification identifies a cargo deck barge and flat-deck cargo application, rather than establishing a dedicated cable-installation configuration. ([leadmarine.org](https://www.leadmarine.org/pdf/LEAD_Moray_specification_sheet.pdf))

23.59. Capital Signal Company Limited

Capital Signal Company Limited includes submarine-cable laying and burial within a broader Caribbean marine-construction offering, alongside crane-barge operations, diving support and fabrication. Its Carenage waterfront facility in Trinidad and Tobago provides a distinct complementary asset: published services include storage, fabrication, vessel repairs, barge transport and mobilization. ■■■ ■■■■■■■ ■■■■■■ ■■■■ ■■ ■■■■ ■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■ ■■■ ■■■■■■ ■■■■■■ ■■ ■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■ ■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■ ■■ ■■■■■ ■■ ■ ■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■

For a Caribbean campaign requiring coastal works, load-out and local marine support, Capital Signal can be assessed for a combined shorebase and construction package. ■■■■■■■ ■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■ ■■■ ■■■■■■■■■■

[illegible] The commercial choice is between bundled local works and logistics, and separately sourced packages with greater buyer coordination; offshore handoffs and defect responsibility must remain explicit.

Sources & Evidence

1. Construction and Engineering - WELCOME TO CAPITAL SIGNAL COMPANY LIMITED
   · Capital Signal's Caribbean marine-construction offering includes submarine-cable laying and burial, crane-barge operations, dive support and steel fabrication. The service list does not identify a dedicated cable-laying asset or cable-specific completion reference. ([capital-signal.squarespace.com](https://capital-signal.squarespace.com/construction-and-engineering))
2. Dock Facilities - WELCOME TO CAPITAL SIGNAL COMPANY LIMITED
   · Capital Signal describes its Carenage waterfront mobilization facility, owned and operated barges and cranes, and storage, fabrication, maritime repairs and barge transport services. Consolidating local interfaces is an analytical implication, not an independently verified timing advantage. ([capital-signal.squarespace.com](https://capital-signal.squarespace.com/dock-facilities))
3. About US - WELCOME TO CAPITAL SIGNAL COMPANY LIMITED
   · The company identifies a Trinidad and Tobago headquarters and a Ciudad del Carmen office specializing in geophysical, survey, navigation and geotechnical services. That office description does not establish a Mexican cable-laying fleet. ([capital-signal.squarespace.com](https://capital-signal.squarespace.com/about-us-xx.xx))

23.60. Swift Offshore & Construction Ltd

The STOW contractor register lists Swift Offshore & Construction Ltd for cable laying, crane-barge operations, trenching and marine construction, and records a certification period from May xx.xx 2026, to May xx.xx 2027. [illegible] It does not identify a cable-laying vessel, installed mission equipment or an executed cable contract.

The Energy Chamber of Trinidad and Tobago states that it has concluded its administration of STOW and directs companies to confirm applicable HSE prequalification requirements with their clients. [illegible] The administrative notice does not itself establish that Swift's recorded certification has been revoked.

Sources & Evidence

1. STOW Certified Companies
   · The register lists Swift Offshore & Construction Ltd for cable laying, crane barges, trenching and marine construction, with a certification period beginning May xx.xx 2026, and ending May xx.xx 2027. The entry does not name a cable vessel or executed cable contract. ([ecttapps.net](https://ecttapps.net/stowttdb/index.php?api=public-search_stow_database&search_text=))
2. Safe TO Work (STOW): Notice to Contractors
   · The Energy Chamber's notice says it has concluded administration of STOW and advises companies to confirm applicable HSE prequalification requirements directly with their clients. It does not state that Swift's individual recorded certification has been revoked. ([stowtt.com](https://www.stowtt.com/))

23.61. Dixstone

Dixstone's marine offering includes pipe/cable layers and complementary offshore support vessels. Its COBEIA specification provides a tangible capability reference: the company describes a multipurpose vessel suitable for cable and pipe laying and ROV work, with Kongsberg DPS2 positioning and a tensioner. ■■■■ ■■■■■■■■ ■■■■■■■■■ ■ ■■■■■■■■ ■■■■■■■■■■■■■■■■■■■■■ ■■■■■■■ ■■■■■■ ■■■■ ■■■■■■■■ ■■■■ ■■■■■ ■■■■■■ ■■ ■■■ ■■■■■■ ■■■■■ ■■ ■ ■■■■■ ■■■■■■

The 2023 COBEIA specification identifies DERMOR Inc. as owner. ■ ■■■■■ ■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■■■■ ■■■■ ■■■■ ■■■■■■■ ■■■■■■■■■ ■■■ ■■■ ■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■ Multipurpose capability may combine adjacent work, but is not a substitute for cable-specific acceptance or a firm employment commitment.

■■■ ■■■■■■■■■ ■■■■ ■■■■■■■■ ■■■ ■■■■■■ ■■■■■■■■■■■■ ■■■ ■ ■■■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■■ ■■■ ■■■■ ■■■■■■■■ ■■■■■■ ■■■■■■■■ ■■■■ ■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■■■■■■■ It does not clearly delineate the executed cable scope. Buyers relying on that reference should request a cable-specific completion or acceptance record; the ambiguity limits the reference, without negating the separately advertised vessel capability.

Sources & Evidence

1. Dixstone Marine - Support with Our Offshore Vessel Fleet
   · Dixstone Marine describes an offshore-vessel operating business whose offering includes pipe/cable layers, anchor-handling tug supply vessels and complementary support barges. This establishes the advertised operating scope, not ownership of every fleet asset.
   ([dixstone.com](https://www.dixstone.com/services/marine/))
2. COBEIA Multipurpose Supply Vessel - Specification Sheet
   · Dixstone's 2023 COBEIA specification describes cable- and pipe-laying and ROV suitability, lists Kongsberg DPS2 positioning and a tensioner, and identifies DERMOR Inc. as owner. The document expressly presents its specifications for information purposes.
   ([dixstone.com](https://www.dixstone.com/images/downloads/specifications/cobeia.pdf))
3. The COBEIA successfully completed Pipe & cable laying campaign in T&T
   · The September xx.xx 2022 announcement has a COBEIA pipe-and-cable completion headline, but its body combines COBEIA pipeline work with MAGISUS conversion and installation. The executed cable scope is not clearly delineated.
   ([dixstone.com](https://www.dixstone.com/news/the-cobeia-successfully-completed-pipe-cable-laying-campaign-in-t-t/))

23.62. SERMACOL C.A.

SERMACOL C.A. identifies its operating entity as Servicios Marítimos de la COL C.A., based in Ciudad Ojeda, Venezuela. ■■ ■■■■■■■■■■ ■■■■■■ ■■■ ■■■■■■■■■■■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■ ■■■ ■■■ ■■■■■■■■■■■■ Its asset list describes diving and crew-transfer boats; delivery also involves allied companies.

Cable primes should qualify defined survey or underwater-support work before broader installation commitments. ■ ■■■■■■■■■■■■ ■■■■■ ■■■■■■■■ ■ ■■■■■■■■■ ■■■■■■■■■

[redacted] Featured pipeline and mooring projects should not substitute for cable-specific references.

Sources & Evidence

1. SERMACOL C.A.
   · SERMACOL identifies Servicios Marítimos de la COL C.A. in Ciudad Ojeda, advertises cable services, describes diving/transfer boats and allied delivery, and features pipeline/mooring projects. ([sermacolca.com](https://sermacolca.com/es))

23.63. SERPROSUB C.A.

SERPROSUB C.A. advertises underwater cable laying alongside commercial diving, marine construction, inspections, and workboat services in Venezuela and the Caribbean, with operating locations in Puerto Cabello and Guanta. [redacted]
Assigning principal cable installation additionally requires documented laying capability and customer acceptance. Regional service access does not itself establish complete cable-system delivery responsibility.

Sources & Evidence

1. SERPROSUBCA | Commercial Diving Services 24/7 - VENEZUELA & CARIBBEAN
   · SERPROSUB advertises underwater cable laying, diving, inspections, marine construction, and workboat services, with locations in Puerto Cabello and Guanta and Venezuela-Caribbean coverage. ([serprosubca.com](https://serprosubca.com/es/inicio/))

23.64. Paraná Logística

Paraná Logística is an Argentina-based marine contractor combining its own vessels with third-party assets. Its cable offering specifically covers route clearance, support to the cable layer, and shore-end work. [redacted]

For an international installation prime, Paraná is a candidate for an Argentine support package: it offers permit coordination, personnel, and floating assets subject to local cabotage requirements. Before appointment, establish vessel control, campaign availability, and the handover boundary with the main cable contractor. [redacted]

Sources & Evidence

1. Parana Logistica - Offshore support services
   · Paraná describes own and third-party assets, permit coordination, personnel provision, and cable route-clearance and shore-end services subject to local cabotage requirements. (paranalogistica.com.ar)
   · Its 2020 Malbec and Tannat account assigns Atlantic Dama to preparation and shore support, identifying Île de Sein as the separate cable layer. (paranalogistica.com.ar)
2. Paraná Logística ya colabora en el tendido del megacable submarino de Google - ArgenPorts
   · The July xx.xx 2023 report corroborates Paraná's Firmina announcement assigning Atlantic Dama to route clearance and describing subsequent shore-landing work as planned. ([argenports.com](https://argenports.com/nota/parana-logistica-ya-colabora-en-el-tendido-del-megacable-submarino-de-google/))

23.65. Asso.subsea

Asso.subsea combines cable-laying assets, trenching vessels, and an in-house Marine Division. Ariadne is described as a DP3 vessel for offshore wind and interconnector installation; Atalanti is a DP2 cable layer configured for shallow-water laying and protection. ■■■ ■■■■■■ ■■■■■■■ ■■■■■■■ ■■■■■■■ ■■ ■■■■■■■■■■■■ ■■■ ■■■■ ■■■ ■■■■■■ ■■ ■■■■■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■ ■■■■■■■■■■■■ ■■ ■ ■■■■■■■■■■■■■ ■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■■■■■■■■■■ ■■ ■■■■■ ■■■■■■ ■■■■■■■

The announced German nearshore award identifies Jan De Nul as main contractor and TenneT as end client, with Atalanti to be modified for a combined power-and-fiber cable bundle. This supports evaluating Asso for a defined nearshore installation package, not assuming responsibility for the entire connection. ■■■■■■ ■■■■■■ ■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■ ■■■■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■ ■■■ ■■■■■■■ ■ ■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■ ■ ■■■■■■■ ■■■■■■■■ ■■■■ ■■■ ■■■■■■ ■■■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■ ■■■ ■■■■■■■

Althea's keel-laying announcement marks hull assembly, with delivery scheduled for 2027. It represents a prospective purpose-built cable-laying asset, not delivered capability. ■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■ ■■ ■■■■■■■■■ ■■■■■■■■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■ ■■■■■■■■■■ ■ ■■■■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■■■

Sources & Evidence

1. Fleet - Asso.subsea
   · Asso identifies an in-house Marine Division managing a fleet separated into cable-laying, trenching-support, and general-support roles. ([assogroup.com](https://www.assogroup.com/our-fleet/))
2. Ariadne - Asso.subsea
   · Asso describes Ariadne as a DP3 cable-laying vessel for worldwide offshore-wind array and export cables, interconnectors, and cable protection. ([assogroup.com](https://www.assogroup.com/fleet/cable-laying-vessels/ariadne/))
3. Atalanti - Asso.subsea
   · Asso describes Atalanti as a DP2 vessel engineered for cable laying and protection in shallow waters. ([assogroup.com](https://www.assogroup.com/fleet/cable-laying-vessels/atalanti/))

4. Fecamp OWF (IAC) (France) - Subsea Cable Laying/Protection/Route Preparation - Asso.subsea
   · Asso's Fécamp account reports Ariadne on installation and Argo and Athena on preparation, burial, and survey, supporting a complementary-spread interpretation without proving comparative performance. ([assogroup.com](https://www.assogroup.com/project/st-brieuc-owf-iac-france-in-progress/))
5. Asso.subsea Secures Nearshore Cable Installation scope for TenneT's 2GW Projects - Asso.subsea
   · The nearshore award names Jan De Nul as main contractor and TenneT as end client; Atalanti modifications for a power-and-fiber cable bundle are described prospectively. ([assogroup.com](https://www.assogroup.com/asso-subsea-secures-nearshore-cable-installation-scope-for-tennets-2gw-projects/))
6. Keel laying ceremony marks official commencement of assembly for Althea - Asso.subsea
   · The Althea announcement reports commencement of hull assembly and delivery scheduled for 2027; it does not report completed vessel delivery. ([assogroup.com](https://www.assogroup.com/keel-laying-ceremony-marks-official-commencement-of-assembly-for-althea/))

23.66. Baltic Offshore

[redacted] Pleijel is presented as a DP2 installation-and-repair vessel for fiber-optic and power cables, with modular auxiliary equipment; its specification identifies Baltic Offshore as owner. Buyers can therefore evaluate either a broader managed installation or a bounded marine package, but should establish which cable supply, protection, and acceptance obligations the actual agreement includes.

Its maintenance proposition combines repair preparedness, technicians, inspections, and spare-material storage near the quay. The company also describes repair and maintenance contracts operating on a first-come, first-served basis. [redacted]

The advertised fleet includes vessels based in Sweden and Norway, while Seaworks Kabel is identified as part of the group. [redacted] Procurement should nevertheless identify the contracting entity and its control over each nominated asset; a group fleet presentation does not establish direct ownership of every vessel by the Swedish company.

Sources & Evidence

1. Pleijel - Baltic Offshore
   · Baltic Offshore describes Pleijel as a DP2 laying-and-repair vessel for fiber-optic and power cables, with modular auxiliary equipment arrangements. ([balticoffshore.se](https://balticoffshore.se/vessels/cs-pleijel/?utm_source=openai))
2. Installations - Baltic Offshore
   · Baltic Offshore offers project-managed turnkey installation and subcontract packages, including cable supply, installation, shore landings, protection, and repairs. ([balticoffshore.se](https://balticoffshore.se/services/installations/))

3. Maintenance - Baltic Offshore
   - Baltic Offshore describes repair preparedness, inspections, technicians, and storage, and explicitly states that several maintenance contracts operate on a first-come, first-served basis. ([balticoffshore.se](https://balticoffshore.se/services/mainteinance/))
4. Storage facilities - Baltic Offshore
   - Baltic Offshore offers indoor and outdoor spare-material storage at or near its quay, supporting a readiness proposition but not independently establishing dispatch priority. ([balticoffshore.se](https://balticoffshore.se/services/mainteinance/storage-facilities/))
5. Vessels - Baltic Offshore
   - The fleet presentation identifies Pleijel and Nordkabel as based in Sweden and Fjordkabel, Nautilus Maxi, and Fjord Connector as based in Norway. ([balticoffshore.se](https://balticoffshore.se/vessels/))
6. Seaworks - Baltic Offshore
   - Baltic Offshore identifies Seaworks Kabel AS as part of its group, supporting group-related delivery reach rather than direct Swedish-company ownership of every listed asset. ([balticoffshore.se](https://balticoffshore.se/about/seaworks/))
7. BOT4101_06 CS Pleijel specification rev G
   - Pleijel's published vessel specification identifies Baltic Offshore as owner and describes the vessel as an installation-and-repair asset. ([balticoffshore.se](https://balticoffshore.se/wp-content/uploads/BOT4101_06-CS-Pleijel-specification-rev-G.pdf))

23.67. JD-Contractor A/S

JD-Contractor A/S provides an operating and chartering route to cable-related marine assets. ■■■■■ ■■■ ■■ ■■■■■■■■■ ■■■ ■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■ ■■■ ■■■■■ ■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■ ■ ■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■ ■■■■ ■■■ ■■ ■■■■■■■■ ■■■ ■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■ ■■■■■■ ■■■■■ The charter portfolio also includes the cable-and-pipeline laying barge Henry P. Lading, giving buyers distinct ship and barge options rather than a uniform cable-vessel configuration.

The company offers project-specific crews with its charter service. ■ ■■■■■■■■ ■■■■■■■ ■■■■■■■ ■■■■■■ ■■■■■■ ■■■■■■■■■■■ ■■■■ ■■■■■■■ ■■■■■■■ ■■■■ ■■■■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■ The named vessel datasheets identify JD Crafts as owner and JD-Contractor as operator, so operational access should not be confused with legal asset ownership.

Cable One requires a specific qualification check: its dedicated datasheet and 2019 brochure describe DP1, whereas the general charter listing describes DP0. The discrepancy does not establish the vessel's present classification. ■■■ ■■■■■■■■■■■■■■■■■■■■■■ ■■■■■ ■■■■■■ ■■■■■■ ■■■■■■■■ ■■■■■ ■■■ ■■■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■ ■■■■ ■■■■ ■■ ■■■■■■■ ■■■■■ ■■■■■■■

Sources & Evidence

1. Cable One - JD-Contractor A/S
   - Cable One is described for installation, repair, surveys, ROV work, and diving support; its dedicated datasheet lists DP1, JD Crafts as owner, and JD-Contractor as operator. ([jdcon.dk](https://jdcon.dk/Fleet-equipment/Fleet/Cable-One))
2. Assister - JD-Contractor A/S
   - Assister is described as a DP2 multipurpose construction vessel operated by JD-Contractor, with cable-installation and subsea-plough equipment options rather than an unconditional installed-package claim. ([jdcon.dk](https://www.jdcon.dk/Fleet-equipment/Fleet/Assister))

3. Vessel charters - JD-Contractor A/S
   - JD-Contractor offers vessel charters with project-specific crews and lists Henry P. Lading as a laying-and-transport barge; the general listing describes Cable One as DP0. ([jdcon.dk](https://jdcon.dk/Offshore-services/Vessel-charters))
4. CLV/DSV Cable One
   - Cable One's brochure, revised May xx.xx 2019, describes a DP1 installation vessel and a positioning upgrade in 2014; this historical description does not settle present classification. ([jdcon.dk](https://jdcon.dk/sw/frontend/downloadfile.asp?id=xx.xx))

23.68. JD Crafts A/S

[illegible] The Cable One and Assister datasheets specifically identify JD Crafts as owner and JD-Contractor as operator. These are shared group assets, not independent supply pools created by separate company names.

[illegible] Before committing, establish the legal counterparty, vessel-control rights, and maintenance responsibilities for the proposed arrangement. Direct third-party leasing terms and reserved availability should be negotiated rather than inferred from common control; neither the group relationship nor asset ownership alone establishes a separate installation-service proposition.

Sources & Evidence

1. Ownership - JD-Contractor A/S
   - JD Crafts is described as JD-Contractor's sister company under G.N. Underwater Invest, owning and operating vessels chartered by JD-Contractor. ([jdcon.dk](https://www.jdcon.dk/About-us/Ownership))
2. Cable One - JD-Contractor A/S
   - The Cable One datasheet identifies JD Crafts as owner and JD-Contractor as operator, establishing shared-asset attribution. ([jdcon.dk](https://jdcon.dk/Fleet-equipment/Fleet/Cable-One))
3. Assister - JD-Contractor A/S
   - Assister's datasheet names JD Crafts as owner and JD-Contractor as operator, corroborating the separation of asset ownership and operating access. ([jdcon.dk](https://www.jdcon.dk/Fleet-equipment/Fleet/Assister))

23.69. Briggs Marine

[illegible] Briggs reports acting as main contractor for SSEN's 2025 subsea replacement works, bringing together cable laying, shore-end support, diving, high-voltage services, and cable protection. This supports consideration for utility projects requiring coordinated marine and electrical responsibilities.

The Forth Constructor, delivered on March xx.xx 2025, adds a DP2 multipurpose platform expressly intended to support inshore cable laying. Its primary maintenance-support role remains relevant: buyers should not equate its cable capability with a dedicated vessel suitable for every installation campaign. ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪

Sources & Evidence

1. Subsea Cables - Marine Services | Briggs Marine
   - Briggs offers installation, maintenance, and repair for power, telecommunications, and offshore wind cables, using its modular equipment on owned or chartered vessels.
2. Briggs Marine Takes Delivery of New Maintenance Support Vessel from Freire Shipyard
   - Briggs announced Forth Constructor's delivery on March xx.xx 2025, identifying DP2 positioning, inshore cable-laying capability, and a primary moorings and navigation-mark maintenance role.
3. Briggs Marine Supports SSEN with Critical Subsea Cable Works This Summer
   - Briggs' November xx.xx 2025 project account identifies its main-contractor role for SSEN replacement works, including cable laying, shore-end support, diving, high-voltage services, protection, and company-owned vessels.
4. Briggs Marine Confirmed as Framework Partner for SSEN Distribution's Multi-Year Subsea Programme
   - The February xx.xx 2026 announcement identifies Briggs' SSEN Distribution framework appointment, planned replacements and urgent repairs, and intended fleet and specialist-team support from 2027 onward.

23.70. Enshore Subsea

Enshore Subsea's relevant capability is the combination of shallow-water cable laying with specialist trenching and protection services. ▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ Cable compatibility, seabed suitability, vessel commitment, and responsibility for interfaces must still be established for the assignment.

Enshore Advantage represents a separate barge-based development for nearshore and inshore cable installation. ▪▪▪ ▪▪▪▪▪ ▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪ ▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪ ▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪ Buyers should distinguish the existing CMOS Installer offering from the proposed barge contribution and require delivery and acceptance confirmation before relying on Advantage for a binding campaign schedule.

Sources & Evidence

1. CMOS Installer
   - Enshore identifies CMOS Installer as a shallow-draft DP2 cable-laying vessel jointly owned, managed, and operated with Herbosch-Kiere.
2. Trenching and Specialist Offshore Contracting - Enshore
   - Enshore offers shallow-water and hard-ground installation and protection services, from asset hire to vessel-inclusive packages, with company personnel and technical support.
3. Enshore Announces Construction of Specialist Shallow Draft Cable Lay Barge Enshore Advantage
   - The March xx.xx 2026 announcement describes Enshore Advantage under construction at Holland Shipyards Group, targeting summer 2026 delivery and a first Nexans assignment in the Wadden Sea in 2027.
   - The described barge configuration includes integrated cable-lay equipment, mooring, and spud positioning; the announcement does not confirm handover or commissioning.
4. Enshore Advantage - Enshore
   - Enshore's Advantage equipment page describes its nearshore and inshore barge configuration and integrated cable-lay package, but provides no dated commissioning confirmation.

23.71. Herbosch-Kiere NV

Herbosch-Kiere NV brings marine civil works and supporting construction assets to cable projects, alongside access to the jointly acquired CMOS Installer. ■■■ ■■■■■■ ■■ ■■■■■■■ ■■■ ■■■■■■■■ ■■■■ ■■■■■■■ ■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■ ■■■■ ■■■■■■■■■■■■ ■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■ ■■■ ■■■■ ■■■■■■■■ Herbosch-Kiere's Antwerp workshop provides an operating base for its specialist marine equipment.

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Sources & Evidence

1. Herbosch-Kiere extends nearshore capability with purchase of shallow draft DP2 vessel, the Topaz Installer
   - Herbosch-Kiere's acquisition announcement identifies joint vessel purchase and joint management and operation through Combined Marine Offshore Services, together with its specialist equipment and Antwerp workshop.
   - Treating partner access as a shared asset rather than separate independently controlled ships is an analytical implication.

2. Submarine power cables in Dakar - Herbosch-Kiere
   - The Dakar reference describes Herbosch-Kiere's excavation, landfall connection, backfilling, and protection responsibilities, with Atlantis, Gaverland, and CMOS Installer contributing different marine functions.
   - The reference supports assessing an integrated construction-and-laying package, not universal route suitability.

23.72. DeepOcean

[illegible] The company identifies modular cable-lay systems deployable on Orient Adventurer, Edda Freya, and other construction vessels. Buyers should therefore select a defined vessel-and-equipment package, with installation and lifecycle obligations stated separately.

[illegible] Developers purchasing installation services should verify DeepOcean's committed vessel window and accepted mission configuration instead of treating the owner's and contractor's descriptions as separate available ships. Combining cable laying with burial and survey can simplify procurement where the agreed scope covers those interfaces; a vessel-only arrangement leaves more integration responsibility with the buyer.

The September xx.xx 2026 TFKable collaboration announcement describes a proposed integrated inter-array cable venture and a planned dedicated newbuild vessel. Establishment remains subject to competition approvals and closing requirements, while vessel development requires project sanction. [illegible]

Sources & Evidence

1. Offshore Wind Cable Installation Services | DeepOcean
   - DeepOcean describes cable engineering, inter-array and export installation, survey, burial, protection, maintenance, and repair, using owned, chartered, and partner vessels.
   - It identifies modular cable-lay systems deployable on Orient Adventurer, Edda Freya, and other construction vessels; package-selection implications are analytical.
2. Østensjø Rederi Secures Multiple New Contracts
   - Østensjø's January xx.xx 2025 announcement identifies DeepOcean as Edda Freya's contractual counterparty, with an extension through 2026.
3. DeepOcean and TFKable Group to develop integrated inter-array cable offering with cable-laying vessel
   - The September xx.xx 2026 announcement describes a proposed DeepOcean-TFKable inter-array EPCI venture and planned dedicated newbuild vessel.
   - The venture requires competition approvals and closing conditions; vessel plans remain subject to project-sanction milestones. The announcement is not evidence of a delivered vessel.

23.73. Østensjø Rederi

Østensjø Rederi participates through vessel ownership and operation. ■■■■ ■■■■■ ■■ ■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■ ■■■■■ ■■ ■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■ ■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■■■■ These attributes support consideration of the platform for combined cable and construction requirements; they do not establish that every cable mission is accepted.

The commercial access route is shaped by the vessel's employment. ■■■■■■■■ ■■■■■■■■■ ■■ ■■■■■■■■■ ■■ ■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■ ■■■■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■ ■■■■■■■■■ ■■■■■■■■ ■■■■■ ■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■ ■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■ ■■■ ■■■ ■■■■■ ■■ ■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■ ■■■■■■■ ■■■■ ■■■■■■■■ ■■■■■■■■ ■■■ ■■■■ ■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■■■■ ■■ ■■■ ■■■■■■■■■■ Existing employment, subsequent options, and customer acceptance must be confirmed before treating the ship as available for another assignment.

Sources & Evidence

1. Østensjø Rederi Secures Multiple New Contracts
   - The announcement describes Edda Freya's hybrid-powered construction role, cable-laying carousel, international suitability, and DeepOcean employment through 2026.
2. Edda Freya - Østensjø
   - Østensjø's Edda Freya particulars identify the offshore construction platform and DP Class xx.xx supporting configuration-specific rather than vessel-label selection.
3. New long-term contract for Edda Freya - Østensjø
   - Østensjø describes its vessel ownership and operation and Edda Freya's longstanding DeepOcean relationship, supporting separation of owner and installation-contractor roles.

23.74. Cecon Contracting

Cecon Contracting provides project management, engineering, and offshore installation through EPCI and transportation-and-installation contracting. ■■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■ ■■■■■ ■■■■■■■■ ■ ■■■■■ ■■■■■ ■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■■■ ■■■ ■■■■ ■■■■■■■ ■■■■■■■■■ ■■ ■■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■ ■■■■ ■■■■■■■■■■■■ ■■■■■■■■■ ■■ ■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■ ■■■■■■ ■■■ ■■■■■■ ■■ ■■■■■■■■■ ■■■■■■■■ Its published vessel list should consequently be interpreted as project access and experience, not proof that every listed ship belongs to Cecon.

Cecon Vigor has progressed beyond an announced newbuild. ■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■ ■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■ ■■■ ■■■■ ■■■■■■■■■■■■ ■■■■■■■ ■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■ ■■■■ ■■■■■■■■ ■■■■ ■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■ ■■■■■■■■■■ ■■■■■ ■■■■■ ■■■■■■■■■■ ■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■■■■ Together, these records

distinguish the vessel recipient, marine manager, and contracting company without assuming common ownership.

For a cable-system supplier choosing an installation contractor, Cecon's flexible vessel selection offers an alternative to specifying a fixed fleet asset. The trade-off is dependence on the particular charter and equipment package assembled for the project. ■■■■■■ ■■■■■■■■■■■■ ■■■■■■ ■■■■■■ ■■■■■■■ ■ ■■■■■ ■■■■■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■ ■■■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■ ■■■ ■■■■■■ ■■■ ■■■ ■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■ ■■■■■ ■■■■■ ■■■■■ ■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■ ■■■■■■■■■■■■ ■■■ ■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■

Sources & Evidence

1. Who we are - Cecon Contracting
   - Cecon identifies project management, engineering, offshore installation, EPCI and transportation-and-installation contracting, Norwegian support bases, modular equipment, and specialist partners.
   - Its June xx.xx 2026 corporate statement identifies Cecon Vigor operation among supplier relationships.
2. Key assets - Cecon Contracting
   - Cecon describes project-specific vessel selection, owner cooperation agreements, charter-market access, installation equipment, ROVs, and subsea-base support.
   - The page supports access-based fleet interpretation, not ownership of every listed vessel.
3. Cecon Vigor was delivered to Agalas yesterday from Sefine Shipyard - Turkiye and is now sailing under the Norwegian flag.
   - Agalas reports receiving Cecon Vigor from Sefine Shipyard and identifies its subsequent association with Cecon Contracting AS; the page does not establish customer-specific mission acceptance.
4. Eidesvik Offshore ASA - Presentation Q1 2026
   - Eidesvik's presentation dated May xx.xx 2026 states that its Cecon Vigor management agreement commenced in May, substantiating a separate marine-management role.

23.75. Seaworks Kabel AS

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■■■ ■■■■■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■ ■■■■■ ■■■■■■■■■■ ■■■■ ■■■■■■■■■■ ■■■■■ ■■■■■■■■■■ ■■■■ ■■■■■■ ■■■■ ■■■■■■■■■ ■■■■■■■■■■■■■■■ ■■■■■■■■ This establishes a project-equipped host-vessel route alongside Seaworks' own fleet, rather than an additional owned ship.

Cable suppliers can therefore assess Seaworks as either a coastal installation partner or a provider assembling a host-vessel package for a defined assignment. ■■■■■■ ■■■■■■ ■■■■■■■ ■■■ ■■■■■■ ■■■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■ ■■■■■■ ■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■■■■■■■■■ The adaptable route provides configuration choice, but requires

agreement on host-vessel integration and access; the owned-fleet route offers a more established platform configuration, subject to mission suitability and availability.

Sources & Evidence

1. About | Seaworks Kabel
   - Seaworks describes coastal cable-project management and installation supported by its owned purpose-built vessel fleet and equipment.
2. Fleet | Seaworks Kabel
   - Seaworks' fleet lists Fjordkabel, Nautilus Maxi, and Fjord Connector and describes purpose-built vessels with differing characteristics.
3. Fjord Connector | Seaworks Kabel
   - Seaworks identifies Fjord Connector as hybrid powered, with battery-supported operation and cable-laying, repair, and survey roles.
   - The description does not establish an all-electric vessel or a campaign-wide emissions outcome.
4. Successfull Delivery of Subsea Power Cable Project in Iceland | Seaworks Kabel
   - Seaworks reports completing Iceland installation under Hengtong's EPCI agreement using Aura equipped with Seaworks' cable-handling systems.

23.76. Meriaura

Meriaura's documented contribution to cable laying is an adaptable vessel platform. The company identifies Meriaura Invest as its owner, while Aura's particulars identify Meriaura Ltd as the vessel owner and describe a Finnish-flagged multipurpose deck cargo carrier with unrestricted navigation classification. ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■■ ■■ ■■■■■■■■■■■ ■■■ ■■■■■■ ■■■ ■■■ ■■■■■ ■■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■ ■■ ■■■ ■■■■ ■■■■■■ ■■■■■■ ■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■■■■ ■■■■■■■■

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Sources & Evidence

1. Successfull Delivery of Subsea Power Cable Project in Iceland | Seaworks Kabel
   - The installation account identifies Meriaura's Aura as a project-equipped host vessel; it does not establish continuous cable-service availability.
2. Company - Meriaura
   - Meriaura identifies Meriaura Invest as its owner and describes commercial vessel activity principally in the Baltic Sea and North Sea.

3. Open deck carrier Aura - Meriaura
   - Aura's particulars identify Meriaura Ltd as owner, Finland as flag, and the vessel as a multipurpose deck cargo carrier with unrestricted navigation classification.
   - The distinction between platform ownership and an installation contractor's mission package is an analytical implication.

23.77. CNGS Engineering

[illegible] Its subsea-cable offering combines surveys, engineering, procurement, installation and commissioning, and identifies East River as a company-operated vessel for power and fiber-optic cables, including shallow-water work. This supports an operator and project-integration role; it does not, by itself, establish responsibility for supplying a newly built or converted vessel.

[illegible] These assets can connect vessel deployment with infrastructure execution, but the fabrication yard should not be treated as a cable-vessel construction reference without a specific delivery record. Support outside this footprint requires project-specific confirmation.

[illegible] An infrastructure contractor may instead value the connected installation services. The distinction matters: access to an operated cable vessel and delivery of a warranted vessel are different commercial commitments.

Sources & Evidence

1. Subsea cable lines | CNGS Engineering Services
   - CNGS lists subsea-cable surveys, engineering, procurement, installation and commissioning, and describes East River as company-operated for power and fiber-optic cable laying, including shallow-water applications. Vessel-supply responsibility and dated operating authority remain separate verification questions. ([cngsengineering.ru](https://www.cngsengineering.ru/en/building/shelf/underwater-cable-lines/))
2. About CNGS Engineering
   - CNGS describes integrated offshore engineering, procurement, logistics, construction, commissioning and warranty-maintenance services. The distinction between infrastructure-project execution and vessel delivery is an analytical interpretation of this published scope. ([cngsengineering.ru](https://www.cngsengineering.ru/en/about/))
3. Contacts of CNGS Engineering: addresses, phone numbers, e-mail
   - The company identifies CNGS Engineering Ltd in Moscow and a fabrication yard in Astrakhan. These locations support the stated Russian physical footprint, not an inference of cable-vessel construction or global service coverage. ([cngsengineering.ru](https://www.cngsengineering.ru/en/contacts/))

23.78. Lloyd Werft

Lloyd Werft offers a cable-vessel development route combining shipbuilding in Bremerhaven with Ulstein's design capability. [illegible]

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The proposed SX228 is optimized for fiber-optic cable laying and prepared for future power-cable operations. That distinction should remain in supplier comparisons: readiness for a later mission is not installed and accepted capability. ■■■ ■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■ ■■■■■■■■ ■ ■■■■■■■ ■■■ ■ ■■■■■■■■■■■ ■■■■■■■■■■

Buyers and equipment partners should assess this route through an executed construction agreement, funded milestones, and allocated design, mission-equipment and acceptance responsibilities. The complementary yard-designer arrangement offers access to a specialized concept, while retaining development and interface dependencies. ■■ ■■ ■■■■■■■■■■ ■■ ■■■ ■■■■ ■■■■■■■■ ■■ ■■■■■■■■■■■■■■■■ ■■■■■■ ■■■■■■■■■■■■ ■■■■■ ■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■

Sources & Evidence

1. Lloyd Werft signs LOI for the construction of a cable-laying vessel
   · The May xx.xx 2025 announcement describes Lloyd Werft's letter of intent as the basis for further construction-contract negotiations and identifies cooperation with Ulstein. It does not establish a firm construction contract.
   ([hr-gruppe.de](https://www.hr-gruppe.de/en/news/article/lloyd-werft-signs-loi-for-the-construction-of-a-cable-laying-vessel))
2. Megamas contracts Ulstein Design & Solutions AS for cable-laying vessel design
   · Ulstein's June xx.xx 2025 announcement establishes a Megamas engineering contract, identifies Lloyd Werft Bremerhaven as the planned builder, and states an end-of-2027 delivery objective. SX228 is optimized for fiber-optic laying and prepared for future power-cable operations; these remain distinct from delivered, accepted capability.
   ([ulstein.com](https://ulstein.com/news/megamas-contracts-ulstein-design-solutions-as-for-cable-laying-vessel-design))

23.79. Holland Shipyards Group

Holland Shipyards Group has a specific construction reference for the shallow-water barge pathway. ■■ ■■■■■ ■■■ ■■■■■ ■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■ ■■ ■■■ ■■■■■■■ ■■ ■■■■■■■ ■■■■■■■■■■ ■ ■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■ ■■■■ ■■ ■■■■■■■■■■■ ■■■■ ■■■■■ ■■■■■■■ ■■■■■■■ ■■■ ■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■■■■ The announcement targeted summer 2026 delivery and an initial Wadden Sea assignment in 2027; those targets should not be treated as confirmation of handover or commissioning.

Vlissingen's documented offshore-focused workshops, hull fabrication, lifting facilities and mission-equipment storage provide a relevant construction and mobilization base. ■■■■ ■■ ■ ■■■■■■■■ ■■■■■■■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■ ■■■■ ■■■■■■■■ ■■ ■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■ ■■■■■■■ ■■■■■■■■ The separately delivered Maasvliet cable-recovery vessel demonstrates tailored cable-handling outfitting, but recovery of obsolete cables is not equivalent to acceptance for cable installation.

Nearshore contractors can evaluate the group for a barge configuration whose access and positioning requirements differ from those of unrestricted seagoing cable ships. Before commitment, they should confirm the contracting yard, actual delivery status, and responsibility for cable-spread integration and commissioning. ■■■ ■■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■ ■■■■■■ ■■■ ■■■■■■■ ■■■ ■■■■■■■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■ ■■■■■■ ■■■■■ ■■■■■■ ■■■■■■■■■■■■■■■■■■■■

Sources & Evidence

1. Enshore Announces Construction of Specialist Shallow Draft Cable Lay Barge Enshore Advantage
   · Enshore's March xx.xx 2026 announcement identifies Holland Shipyards Group's Vlissingen yard as Enshore Advantage's builder. It describes nearshore cable-laying, HVDC-spread, mooring, spud and grounding features, with summer 2026 delivery and a 2027 initial assignment stated as targets rather than completed events.
   ([enshoresubsea.com](https://enshoresubsea.com/blog/enshore-announces-construction-of-specialist-shallow-draft-cable-lay-barge-enshore-advantage/))
2. Werven - Holland Shipyards Group
   · The group describes Vlissingen's offshore focus, workshops, hull and steel fabrication, lifting facilities, and space for mobilization and mission-equipment storage. These are location-specific facilities; broader service coverage is not established by the page.
   ([hollandshipyardsgroup.nl](https://www.hollandshipyardsgroup.nl/over-ons/werven))
3. Delivery Cable Recovery Vessel ‘Maasvliet’
   · The February xx.xx 2025 announcement reports delivery of Maasvliet as a cable-recovery vessel with dedicated cable-management and handling arrangements. Its relevance as complementary outfitting evidence, rather than proof of installation acceptance, is an explicit analytical distinction.
   ([hollandshipyardsgroup.nl](https://www.hollandshipyardsgroup.nl/news/delivery-cable-recovery-vessel-maasvliet))

23.80. Freire Shipyard

Freire Shipyard has a delivered reference for a compact multipurpose vessel with cable-related capability. Briggs Marine announced receipt of Forth Constructor from the Spanish builder on March xx.xx 2025. ■■■ ■■■■■■■■■ ■■■■ ■■ ■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■ ■■■■■■■ ■■■■■ ■■■■■■ ■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■■ ■■■■ ■■■■■■■■ ■ ■■■■■■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■■■ ■■ ■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■■■■■■ ■■■■■■

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Owners seeking a support vessel with occasional cable duties can use Forth Constructor as a relevant qualification reference. A dedicated cable-vessel purchase requires a separate acceptance case for the proposed cable spread, mission endurance and operating envelope. ■■■■■■■■■■■ ■■■■■■ ■■■■ ■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■■■■■ ■■■■■ ■■■■■■■■■■■■■ ■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■ ■■■■■ ■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■ ■■■■ ■■ ■■■■■■■ ■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■

Sources & Evidence

1. Briggs Marine Takes Delivery of New Maintenance Support Vessel from Freire Shipyard
   · Briggs reported delivery of Forth Constructor from Freire in Spain on March xx.xx 2025, identifying mooring and navigation-mark servicing as its primary role and inshore cable laying as an additional capability. ([briggsmarine.com](https://www.briggsmarine.com/media/news-insights/forth-constructor-delivery/))
2. Freire NB-734 Forth Constructor - 40 M Maintenance Support Vessel
   · Freire's Forth Constructor specification documents diesel-electric propulsion, dynamic positioning, four-point mooring and removable handling equipment. These support configuration-specific multipurpose construction capability, not equivalence to every dedicated cable-laying mission. ([freireshipyard.com](https://freireshipyard.com/wp-content/uploads/2023/xx.xx/Ficha-xx.xx-I-OPA-xx.xx.pdf))

23.81. Cintranaval

[redacted] Briggs Marine identifies it as Forth Constructor's designer, working with Freire to the owner's specification. Its published portfolio and Spanish office support a design-company orientation, while the delivered vessel provides a relevant reference for combining shallow-water cable duties with other marine-support assignments.

The joint project account explains the underlying design challenge: balancing restricted draft, working-deck utility, propulsion, positioning and accommodation within a compact vessel. [redacted] Design flexibility remains bounded by the configuration ultimately built and accepted.

An owner considering a similarly mixed mission can qualify Cintranaval for bespoke design work while appointing a construction yard separately. The contract should allocate class submissions, production-document interfaces, equipment integration and design-change responsibilities. [redacted]

Sources & Evidence

1. Briggs Marine Takes Delivery of New Maintenance Support Vessel from Freire Shipyard
   · Briggs identifies Cintranaval as Forth Constructor's designer to the owner's specification, working in conjunction with Freire Shipyard. This establishes a distinct design contribution to a delivered project. ([briggsmarine.com](https://www.briggsmarine.com/media/news-insights/forth-constructor-delivery/))
2. CINTRANAVAL DESIGNS
   · Cintranaval's design portfolio includes offshore support vessels and identifies its office in Loiu, Spain. It supports the company's naval-architecture orientation and geographic base, without establishing complete-vessel construction responsibility. ([cintranaval.com](https://cintranaval.com/cnd-designs/))

3. Highly customized designs to meet the most demanding technical requirements. Case study: mooring vessel Forth Constructor

   · The joint Forth Constructor project account describes balancing restricted draft, working-deck requirements, propulsion, positioning, accommodation and structural requirements. The profile interprets these documented constraints as a bespoke-design proposition, not a universal cable-vessel capability. ([64congreso.ingenierosnavales.com](https://64congreso.ingenierosnavales.com/wp-content/uploads/2025/xx.xx/xx.xx-xx.xx-MIRADOR-LAURA-Y-AINARA-40Disenos-altamente-personalizados-FINAL.pdf))

23.82. Kongsberg Maritime

Kongsberg Maritime can participate through vessel design, integrated marine systems and lifecycle support. ■■■ ■■ ■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■ ■■■■ ■■■■■■ ■■■■■ ■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■ ■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■■■ ■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■ ■■■■■■■■ These are selectable delivery scopes, not proof that every advertised option has been installed and accepted on a customer's vessel.

For an owner or yard, design-only procurement preserves equipment choice but leaves more cross-package coordination with the buyer and construction team. A broader Kongsberg package can place nominated system interfaces with one technology supplier, provided integration and acceptance obligations are explicitly contracted. ■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■

The cable-vessel offering also includes positioning systems, refits, predictive maintenance and remote diagnostics by certified engineers, supported by a stated global customer-support organization. ■■■■■■ ■■■■■■ ■■■■■■■■■ ■■■■ ■■■■■ ■■■■ ■■■■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■ ■■■■■■■■■■■ Remote diagnostic access is useful, but it is not a substitute for confirmed local execution capacity or agreed responsibility for faults spanning third-party mission equipment.

Sources & Evidence

1. Cable laying vessel

   · Kongsberg's cable-vessel offering includes positioning systems, refits, lifecycle support, predictive maintenance and remote diagnostics by certified engineers, alongside a stated global support organization. Vessel-specific attendance and cross-system fault ownership require contractual confirmation. ([kongsbergmaritime.com](https://www.kongsbergmaritime.com/segments/offshore-wind/pipelay/))

2. Cable laying vessel designs - Kongsberg Maritime

   · Kongsberg's UT portfolio includes cable-maintenance and cable-laying designs. It explicitly offers ship design alone or integrated propulsion, deck machinery, energy storage, generation, automation and bridge-system packages. The control-versus-interface-accountability trade-off is analytical and contract-dependent. ([kongsbergmaritime.com](https://www.kongsbergmaritime.com/services/ship-design/specialised-vessels-design/cable-laying-vessel-designs/))

23.83. Ship Design Group

Ship Design Group's cable-laying-vessel reference identifies basic-design responsibility covering general design, hull, piping and machinery, deck systems and equipment foundations. Its Romania-based engineering offer also includes class-oriented documentation

and equipment-purchasing support. ■■■■ ■■■■■■■■■■■ ■ ■■■■■■■■■■ ■■■■■■■■■■■■■■■ ■■■■ ■■■■■■ ■■■■ ■ ■■■■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■

The company separately offers detailed design and production information based on either its own basic design or client-supplied documentation, with outputs tailored to the construction yard's requirements. That flexibility is relevant to a lead designer or yard seeking delegated engineering capacity while retaining the overall vessel concept. ■■ ■■■■ ■■■■■ ■■■■ ■■■ ■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■ ■■■■■■■■ ■■■■■■■■■■■■■■ ■■■ ■■■ ■■■■■■■■■■ ■■ ■■■■■■■■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■

Yards and lead designers can qualify Ship Design Group for a defined engineering package after establishing a named cable-vessel reference, required deliverables and design-change authority. Buyers should not transfer hull construction, commissioning or whole-vessel warranty obligations merely because a supplier provides class documentation. ■■■ ■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■ ■■ ■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■ ■■■■■■■■■ ■■ ■■■■■■■■■■ ■■■ ■■■ ■■■■■■■■■■ ■■■■ ■■■■■■ ■■■■■■■■■■■ ■■ ■■■■■■■■ ■■■■■■■■■■■■■

Sources & Evidence

1. Cable Laying Vessel - SHIP DESIGN GROUP
   · Ship Design Group's cable-laying-vessel reference specifies basic design covering general design, hull, piping and machinery, deck systems and main equipment foundations. This is an engineering scope, not a complete-vessel construction or warranty commitment. ([shipdesigngroup.eu](https://www.shipdesigngroup.eu/projects/cable-laying-vessel/))
2. Basic Design - SHIP DESIGN GROUP
   · Ship Design Group offers basic-design documentation based on class requirements and technical support for equipment purchasing. Its listed head office is in Romania. Design-package qualification and vessel-delivery accountability remain separate commercial questions. ([shipdesigngroup.eu](https://www.shipdesigngroup.eu/design-services/basic-design/))
3. Detailed Design & P.I. - SHIP DESIGN GROUP
   · The company offers detailed design and production information based on its own basic design or client documentation, and customizes outputs to the shipyard's requirements, standards and capabilities. Delegated-engineering suitability is conditional on documented inputs and interface allocation. ([shipdesigngroup.eu](https://www.shipdesigngroup.eu/design-services/detailed-design-pi/))

23.84. GLO Marine

GLO Marine documents an engineering-led conversion pathway from platform supply vessel to cable-laying and maintenance vessel. Its case study identifies a 2025 project and reports completed conversion, with engineering, class-approval support and on-site supervision. ■■■ ■■■■■ ■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■ ■■■■■■■■■■■■■ ■■ ■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■ ■■■■■■ ■■■■■■■■■■■■■ ■■■■ ■■ ■■■■■■■■■■■■■ ■■■■■■■■ ■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■ ■■■■■■■■ ■■ ■■■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■ ■■■ ■■■■ ■■■■■■■■■ This supports an execution-capable engineering proposition, but the cable-vessel case does not establish sole responsibility for every yard activity, equipment warranty or complete-vessel obligation. Attendance and support should be contracted for the actual conversion location rather than inferred from general service descriptions.

■■ ■■■■■ ■■■■ ■■ ■■■■■■■■ ■■■ ■■■ ■■■■■■■■ ■■■ ■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■ ■■■■■■■■■■ ■■■ ■■■■■ ■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■ Before appointment, the owner should obtain a reference under suitable confidentiality arrangements and agree the yard, equipment-supplier and engineering responsibility boundaries. Conversion retains an existing platform but also its constraints; if those constraints prevent the required accepted configuration, a purpose-built alternative remains the relevant comparison.

Sources & Evidence

1. PSV Conversion to Cable Laying Vessel | GLO

   · GLO identifies the confidential-client conversion as a 2025 project and reports completion of a PSV-to-cable-laying-and-maintenance conversion. Its stated scope includes engineering, class-approval support, on-site supervision, integration and as-built documentation. The account does not independently establish a named delivery or sole whole-vessel responsibility. ([glo-marine.com](https://glo-marine.com/case-studies/psv-conversion-to-cable-laying-vessel/))

2. Installation & Commissioning | GLO

   · GLO's installation and commissioning service covers mechanical, electrical and control-system integration, commissioning, handover documentation and crew training. The profile distinguishes this general offering from the narrower allocated responsibilities documented in the cable-vessel case. ([glo-marine.com](https://glo-marine.com/services/installation-and-commissioning))

23.85. Remontowa Holding SA

Remontowa Holding's cable-vessel capabilities combine Polish shipyard conversion work with specialist marine engineering. ■■■ ■■■■■ ■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■ ■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■ ■■■ ■■■■■■ ■■■■■■■■ ■■ ■■■■■■■■■ ■■■■■■ ■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■■ ■■■■ ■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■ ■ ■■■■■■■■■■■ ■■■■■■ ■■ ■■■■■■■■■■■■ ■■■■■ ■■■■■■■■■■■■■■ ■■■■ ■■■ ■■■■■■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■■■■ This provides a specific engineering reference rather than an undifferentiated claim that every group company supplies the complete vessel.

For an owner considering conversion, the commercial attraction is access to related yard and engineering capabilities within one industrial group. ■■■■ ■■■■■■■■■■■■ ■■■■ ■■■ ■■■■■■■ ■■■■■■■■■ ■ ■■■■■■■■■■■■ ■■■■■■■■■■ ■ ■■■■■■■■■ ■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■ ■■■■■■■■■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■ ■■■■■ ■■■ ■■■■■ ■■ ■■■■■■■■■■■ ■■ ■■■■■■■■■■■ ■■■■■■■■■■ ■ ■■■■■■■■ ■■■ ■■■■■ ■■■ ■■■■ ■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■ The Boka Ocean engineering scope should not be interpreted as proof of a complete turnkey delivery commitment or an available newbuild slot.

Sources & Evidence

1. Boka Ocean-Project Description

   · RMDC identifies Boka Ocean's conversion from pipe laying to inter-array cable installation and specifies detailed design, site supervision, and as-built documentation as its scope. ([rmdc.rh.pl](https://rmdc.rh.pl/en/references/boka-ocean))

2. Products - Remontowa Holding
   · Remontowa Holding assigns cable-vessel conversions to Remontowa Shiprepair Yard and marine design and conversion engineering to its design business; these are distinct delivery functions. ([remontowaholding.pl](https://www.remontowaholding.pl/en/index/products/))

23.86. Salt Ship Design

Salt Ship Design is relevant as a cable-vessel designer and engineering partner rather than as the shipyard or installation operator. Østensjø identifies Salt as the designer of Edda Freya, a construction vessel developed with cable-laying, construction, maintenance, and repair missions in mind. ■■■■■■ ■■■■ ■■■■ ■■■■■■■■■■■■ ■■■■ ■■■■■■■■■■ ■■■ ■■ ■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■ ■■■■■■■ ■■■■ ■■■■■■ ■■■■■■■■ ■■ ■■■ ■■■■■■■ ■■■■■■■■■■■■■■■■ ■■■■■ ■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■ ■■ ■■■■ ■■■■■■■■ ■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■

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Sources & Evidence

1. New long-term contract for Edda Freya - Østensjø
   · Østensjø identifies Salt Ship Design as Edda Freya's designer and describes the vessel's cable-laying, construction, maintenance, and repair mission focus. ([ostensjo.no](https://ostensjo.no/new-long-term-contract-for-edda-freya/))
2. Services - Salt Ship Design
   · Salt offers conceptual and yard-tender packages, basic and detailed design, construction follow-up, site support, and retrofit and modification advice. ([saltship.com](https://www.saltship.com/services))
3. New Cable Laying Vessel for LS Marine Solution - Salt Ship Design
   · Salt's July xx.xx 2025 announcement identifies its design for LS Marine Solution's vessel ordered from Tersan Shipyard and describes battery-assisted power and electric mission equipment as design features. ([saltship.com](https://www.saltship.com/newscollection/xx.xx-contract))

23.87. Kleven Verft

Kleven Verft has an attributable historical cable-related construction reference: Edda Freya's owner identifies the Ulsteinvik yard as its builder. Present yard capability requires a separate assessment. ■■■■■ ■■■■ ■■■■ ■■■■ ■■■ ■■■■■■■■■■■■■■■■■■■ ■■■■ ■■■■■■■■■■ ■■ ■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■ ■■■■ ■■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■■■■■■ ■■■■ ■■■ ■■ ■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■ ■■■ ■■■■■■■ ■■■■■ ■■■■■■■ ■■ ■■■■■■■■ ■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■■■

RESEARCH SAMPLE REPORT

The current Green Yard Kleven business reported delivery of NTT World Engineering Marine's VEGA II conversion in September 2024 for communications-cable installation and repair. [redacted] The unresolved issue is legal inheritance, not whether cable-related shipbuilding and conversion work has occurred at the site.

Sources & Evidence

1. Green Yard Kleven leverer stort ombyggingsprosjekt med fokus på bærekraft
   • Green Yard Kleven's September xx.xx 2024 announcement documents delivery of VEGA II's communications-cable installation and repair conversion, with Marin Teknikk engineering and Parkburn cable-handling equipment. ([greenyard.no](https://greenyard.no/nyhende-artiklar/green-yard-kleven-leverer-stort-ombyggingsprosjekt-med-fokus-p-brekraft))
2. New long-term contract for Edda Freya - Østensjø
   • The vessel owner identifies Kleven Verft in Ulsteinvik as Edda Freya's builder, establishing historical construction participation. ([ostensjo.no](https://ostensjo.no/new-long-term-contract-for-edda-freya/))
3. Green Yard Group overtar driften ved Kleven Verft - E24
   • E24 corroborates Green Yard Group's takeover of bankruptcy-affected Kleven yard operations through an agreement with the estate and banks; it does not establish transfer of every historical obligation. ([e24.no](https://e24.no/naeringsliv/i/WbnQ8K/green-yard-group-overtar-driften-ved-kleven-verft))
4. Contact - Green Yard
   • Current yard contracting materials identify Green Yard Kleven AS in Ulsteinvik, distinguishing the current counterparty name from the historical Kleven Verft identity. ([greenyard.no](https://greenyard.no/contact))

23.88. TFKable Group

TFKable Group contributes subsea power-cable design, manufacturing, and field support through Tele-Fonika Kable and JDR Cable Systems, with relevant facilities in Poland and the United Kingdom. [redacted]

[redacted] Combining manufacturing with marine installation could simplify interfaces, but the legal delivery counterparty, vessel commitment, and contractual accountability must be verified before a campaign depends on it. Separately contracting cable supply and an installer preserves sourcing flexibility while retaining buyer

coordination; the proposed venture is an alternative only after its relevant commercial and asset milestones are established.

Sources & Evidence

1. DeepOcean and TFKable Group to develop integrated inter-array cable offering with cable-laying vessel
   · The September xx.xx 2026 agreement proposes an inter-array EPCI venture and dedicated vessel, identifies planned ownership participants, and retains competition approval, closing, and project-sanction conditions. It does not establish operating vessel capacity. ([deepoceangroup.com](https://www.deepoceangroup.com/articles/deepocean-and-tfkable-group-to-develop-integrated-inter-array-cable-offering-with-cable-laying-vessel))
2. JDR - history
   · JDR identifies its acquisition by Tele-Fonika Kable and membership in TFKable Group, supporting attribution of JDR's capabilities within the group profile. ([jdrcables.com](https://www.jdrcables.com/about-jdr/history))
3. Markets and Solutions - Renewables - JDR
   · JDR describes subsea power-cable design, manufacturing, and specialist field services, with relevant manufacturing facilities in the United Kingdom and Poland. These are cable-system capabilities, not proof of vessel ownership. ([jdrcables.com](https://www.jdrcables.com/markets-and-solutions/renewables))

23.89. DOF Group ASA

DOF Group's cable-vessel relevance extends to integrated installation work from a construction-vessel platform. ■■■ ■■■■■ ■■■ ■■■■■ ■■■■■■■■ ■■■■■ ■■■■■■ ■■■■■■■■■■■■ ■■ ■■■■■■ ■■■■■ ■■■■■■ ■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■ ■■■■■■■ ■■■■■ ■■■■■■ ■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■ ■■■■■■■ ■■■ ■■■■■ ■■■■■ ■■ ■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■ ■■■■■ ■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■ DOF also offers subsea engineering through project development, integration, installation, and completion, supported by global engineering resources.

For a transmission owner, this supports evaluating DOF as a vessel-and-project delivery contractor rather than solely through a dedicated cable-layer fleet label. ■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■■ ■■■■■ ■■■ ■■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■ ■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■ ■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■■■■■■■■■ ■■■■■ ■■ ■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■■■ ■■■■■■ ■■■■ ■■■■■■■ ■■■■■■■■■■■■ ■■■■ ■■■ ■■■■■■ The Statnett award establishes a future service commitment, not completed offshore work or unrestricted availability for another project.

Sources & Evidence

1. DOF Group ASA - Awarded cable replacement contract by Statnett
   · DOF's March xx.xx 2026 Statnett award covers subsea power-cable replacement with fiber-optic lines, planned 2027 offshore execution from an unnamed construction vessel, and preparation from Norwegian and Scottish offices. ([dof.com](https://www.dof.com/news/dof-group-asa---awarded-cable-replacement-contract-by-statnett))
2. Engineering services - DOF
   · DOF offers engineering across subsea project development, integration, offshore installation, and completion, with local teams backed by global engineering resources. ([dof.com](https://www.dof.com/services/engineering-services))

3. DOF Group ASA - Q1 2026 presentation
   · DOF's May 2026 presentation reports Skandi Connector's sale after the first quarter. This supports rejecting historical fleet descriptions as sufficient evidence of continuing vessel access. ([mb.cision.com](https://mb.cision.com/Public/xx.xx/xx.xx/af9890ae3752a450.pdf))

23.90. Solstad Maritime ASA

[illegible] Its first-half 2026 report confirms delivery to the new owner in June 2026. Normand Clipper therefore no longer provides a continuing Solstad Maritime-owned cable-vessel reference.

The remaining offering includes construction vessels and associated ROV, tooling, personnel, and engineering support, but those services do not establish a replacement cable-laying configuration. [illegible] Multipurpose marine support may be relevant, but dedicated cable-mission coverage cannot be inferred from the historical Clipper charter or the broader Solstad brand.

Sources & Evidence

1. Solstad Maritime ASA - Sale of CSV Normand Clipper
   · Solstad Maritime's December xx.xx 2025 announcement identifies Global Marine Group's exercised purchase option for Normand Clipper and the vessel's prior worldwide cable-laying employment. ([solstad.com](https://www.solstad.com/solstad-maritime-asa-sale-of-csv-normand-clipper/))
2. Solstad Maritime ASA 1H Report 2026
   · The first-half 2026 report confirms Normand Clipper's completed delivery to its new owner in June 2026. It also describes associated subsea services and arrangements separating Solstad Maritime asset ownership from Solstad Offshore operation. ([mb.cision.com](https://mb.cision.com/Main/xx.xx/xx.xx/xx.xx.pdf))

23.91. Astander

Astander provides cable-vessel conversion, upgrade, and repair capabilities at Santander rather than cable-installation vessel operation. Its own CMOS Installer account connects an earlier conversion, completed in 2012 under the Topaz Installer name, with a subsequent return for carousel-related, deck-access, ROV-protection, and ballast-water compliance work. [illegible]

[illegible]

[redacted] Astander's completed conversion reference supports its yard role, not ownership of CMOS Installer or responsibility for the customer's offshore installation contract. Bundling yard tasks can centralize coordination, but it transfers only the integration and acceptance obligations expressly included in the contract.

Sources & Evidence

1. #shipsandshipping #maritime #maritimeindustry #combinedmarine #enshoresubsea #herbosch #shipyard #drydock #cmosinstaller #astander | Astilleros de Santander S.A.U.
   · Astander's own post documents CMOS Installer's completed 2012 conversion and later underway carousel, deck-access, ROV-protection, and ballast-water upgrades; the subsequent project assignment was prospective. ([linkedin.com](https://www.linkedin.com/posts/astander_shipsandshipping-maritime-maritimeindustry-activity-xx.xx-eOTv))
2. Facilities - Astander - Shiprepairs & Conversions
   · Astander identifies Santander dry-docking facilities, thruster-access pits, mechanical and electrical workshops, and equipment-maker support. These establish physical yard capabilities rather than project-specific availability or acceptance. ([astander.es](https://www.astander.es/facilities/))

23.92. E-marine PJSC

[redacted] Its vessel materials identify CS Maram and CS NIWA as DP2-equipped cable ships, alongside other mission assets. The company also describes telecommunications installations and composite power-cable work, making cable compatibility a vessel-and-project selection issue rather than a conclusion based solely on its telecommunications heritage.

[redacted] Buyers should specify the assigned vessel, deployment window, legal employment rights, spare-cable access, mobilization obligations, and repair-priority arrangements. Regional facilities support the service proposition but do not guarantee immediate response or unrestricted capacity; contracted access trades direct asset control for reliance on the operator's agreed availability and support obligations.

Sources & Evidence

1. Vessels - E-marine
   · E-marine's vessel materials identify CS Maram and CS NIWA as DP2-equipped cable ships, alongside other mission assets; the listing does not establish project-specific employment rights or availability. ([emarine.ae](https://www.emarine.ae/en/Vessels))

2. Services - E-marine
   · E-marine describes installation, maintenance, repair, survey, storage, and chartering services, telecommunications and composite power-cable references, Hamriyah and Salalah depots, and customer-specific technical-team provision. ([emarine.ae](https://www.emarine.ae/en/Services))

23.93. NMDC Energy

NMDC Energy combines named cable-capable marine assets with offshore engineering, procurement and construction. Its fleet catalogue identifies Umm Shaif for offshore support and cable laying and Shujaa 2000 for heavy lifting and cable laying. ■■■■■■■■■■■ ■■■■■ ■■■■■■■■■■ ■■■■■ ■■■■■■■■■■■■ ■■■■■■■ ■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■ ■■■■■ ■■■■■ ■■■■ ■■■ ■■■■■■■■■ ■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■ ■■■■ ■■ ■■■■■■■■■■ ■■■■ ■■■■■ ■■■■■ ■■■■■■■ ■■■ ■■ ■■■■■■■■ ■■■■■ ■■■■■■■■

Energy-infrastructure customers can evaluate cable work within a wider offshore package where NMDC accepts the associated equipment interfaces and delivery responsibilities. Vessel owners and equipment partners should instead establish the named platform, vessel-holding entity, installed cable package and access arrangement before committing resources. ■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■ ■■■■■■■■■■■■■■■■ ■■■■■■■■■■■ ■■ ■■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■ ■■■■■ ■■■■■■■ ■■ ■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■ ■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■ ■■■■■ ■■■■■■■■ ■■ ■■■ ■ ■■■■■■■ ■■■■■■■■■■■■

Sources & Evidence

1. Fleet and Assets
   · NMDC Energy identifies Umm Shaif for offshore support and cable laying, Shujaa 2000 for heavy lifting and cable laying, and fabrication yards supporting offshore construction. ([nmdc-energy.com](https://www.nmdc-energy.com/en/about-us/fleet/))
2. Our Business
   · NMDC Energy describes offshore and onshore EPC services and an operating footprint encompassing the Arabian Gulf, South Asia and Southeast Asia. ([nmdc-energy.com](https://www.nmdc-energy.com/en/ipo/our-business/))

23.94. Ali & Sons Marine Engineering Factory

Ali & Sons Marine Engineering Factory offers an Abu Dhabi yard-based route for vessel construction and repair, with historical cable-vessel conversion experience. Ali & Sons identifies its Mussafah facility, and the marine division offers naval architecture, marine engineering, machinery installation, docking and vessel repairs. ■■■ ■■ ■■■■■ ■■■■ ■■■■■■■■ ■ ■■■■■■■■■■■■■ ■■■■■■■■■■ ■ ■■■ ■■■■ ■■■■■■ ■■■■■■■■■ ■■■ ■■■■ ■■■■■■■■■■ ■ ■■■■■■■ ■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■ ■■■■ ■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■■■■

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vessel maintenance, while separate designers and mission-package suppliers retain interfaces unless the yard's contract includes them. CS Maram establishes historical participation, not current delivery slots or equivalence with a future buyer's required configuration.

Sources & Evidence

1. Ali & Sons Marine Engineering Factory
   · Ali & Sons identifies Ali & Sons Marine Engineering Factory in Mussafah, Abu Dhabi, and describes vessel-construction, workshop and repair capabilities. ([ali-sons.com](https://www.ali-sons.com/en-energy-industrial/ali-sons-marine-engineering-factory))
2. ASMEF - Ship Building & Repair Division
   · ASMEF's shipbuilding and repair division offers naval architecture, marine engineering, machinery installation, docking and repairs, with classification requirements identified for construction work. ([ali-and-sons-marine-engineering-factory.com](https://www.ali-and-sons-marine-engineering-factory.com/ship-building-repair-division))
3. RO/RO gets new life as cable layer
   · The May xx.xx 2015 report describes Ali & Sons' conversion of a former RO/RO carrier into CS Maram for E-Marine, with Technolog and Wärtsilä design and supervision involvement; delivery was still prospective. ([marinelog.com](https://www.marinelog.com/news/ro-ro-gets-new-life-as-cable-layer/))

23.95. Tersan Shipyard Inc.

Tersan Shipyard Inc. has a contracted cable-vessel newbuild program for South Korea's LS Marine Solution. ■■■ ■■■■ ■■■■ ■■■■■■■■■■ ■■■ ■■■■ ■■ ■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■ ■■■■ ■■■■■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■ ■■■■ ■■■■ ■■■■■■■ ■■ ■■■■■■■■■■■ ■■■ ■■■ ■■■■■■ ■■■■■■■ ■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■ ■■ ■■■ ■■ ■■■■■ ■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■■■ Tersan identifies Yalova as its newbuilding and repair base and Tuzla as a repair location.

■■■ ■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■ ■■ ■ ■■■■■■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■ ■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■ ■■■■ ■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■ ■■■■■ ■■■■ ■■■■■■■■ ■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■■ ■■■■ ■ ■■■■■■■■■■ ■■■■■■■■■■ ■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■ ■■■■ ■■■■ ■■■■■■■■■■■■■■■■■■ ■■■■■■■■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■ Customization offers closer mission alignment but retains execution exposure until acceptance. Delivery and demonstrated configuration acceptance, rather than steel cutting alone, would strengthen the basis for treating this program as a completed cable-vessel reference.

Sources & Evidence

1. TERSAN SHIPYARD HOLD STEEL CUTTING CEREMONY FOR NEXT GENERATION CABLE LAYING VESSEL NB1139
   · Tersan reports a June xx.xx 2026 steel-cutting milestone for NB1139 under construction for LS Marine Solution, with intended high-voltage AC/DC power-cable and fiber-optic installation capability. ([tersanshipyard.com](https://tersanshipyard.com/en/news/tersan-shipyard-hold-steel-cutting-ceremony-for-next-generation-cable-laying-vessel-nb1139))

2. TERSAN SHIPYARD AND LS MARINE SOLUTION SIGNED COTRACT FOR ONE OF THE WORLD'S LARGEST CABLE LAYING VESSEL
   · Tersan's June xx.xx 2025 announcement establishes a signed LS Marine Solution vessel-construction agreement, Salt Ship Design involvement and an announced 2028 operational target. It identifies Yalova newbuilding/repair and Tuzla repair locations. ([tersanshipyard.com](https://tersanshipyard.com/en/news/tersan-shipyard-and-ls-marine-solution-signed-cotract-for-one-of-the-worlds-largest-cable-laying-vessel))

23.96. Sefine Shipyard

Sefine Shipyard has a delivered cable-lay support-vessel reference through Cecon Vigor, its NB68 project for Agalas. Agalas confirms handover, while NSK Ship Design identifies the vessel as a 2026-built cable-laying and construction platform. ■■■ ■■■■■■ ■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■ ■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■ ■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■ ■ ■■■■■ ■■■■■ ■■■■■■■■ ■■■■■■■ ■■■■■ ■■■■■■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■■■■■■ ■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■

For owners seeking employment across cable work and light offshore construction, this is a relevant reference for a flexible platform rather than proof of a universally interchangeable cable vessel. Before commissioning a similar build, distinguish fixed shipyard deliverables from project equipment that the owner or contractor must mobilize, and assign integration, acceptance and warranty responsibilities. ■■■ ■■■■■■■■■ ■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■■ ■■ ■■■■■ ■■■■■■ ■■■ ■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■■■■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■■■■ ■■■■ ■■■■ ■■■■ ■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■

Sources & Evidence

1. NB 68 Cable Lay Support Vessel
   · Sefine describes NB68 for Agalas as a DP2 cable-lay support vessel intended for installation, inspection and repair, with diesel-electric, methanol/diesel and battery-supported architecture. The catalogue retains an under-construction label. ([sefine.com.tr](https://sefine.com.tr/projects/project_detail/2183))
2. Cecon Vigor - NSK Ship Design
   · NSK identifies Cecon Vigor as a 2026-built Agalas cable-laying and construction vessel from Sefine, combining a cable tank, flexible project deck, diesel-electric propulsion, methanol/diesel flexibility and batteries. These are design attributes, not independently measured operating savings. ([nskshipdesign.no](https://www.nskshipdesign.no/nybygg/offshore/cecon-vigor))
3. Agalas: Cecon Vigor was delivered from Sefine Shipyard
   · Agalas confirms that Cecon Vigor was delivered from Sefine and was sailing under the Norwegian flag, establishing handover rather than only an announced construction program. ([linkedin.com](https://www.linkedin.com/posts/agalas_cecon-vigor-was-delivered-to-agalas-yesterday-activity-xx.xx-renT))
4. Cecon Vigor 2026-08
   · Maritimt Magasin's August xx.xx 2026 article corroborates delivery of Cecon Vigor and identifies it as Sefine's construction number xx.xx connecting the delivered vessel with NB68. ([maritimt.com](https://www.maritimt.com/?lcid=xx.xx&nid=xx.xx))

23.97. Arab Tanker Services and Contracting L.L.C.

Arab Tanker Services and Contracting L.L.▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪ ▪▪▪▪▪▪▪ It states that it has ADNOC submarine cable-work approval and a contract to build and operate a DP2 repair crane barge for the Lightning Project.

The Q4 2025 delivery target does not establish completed handover. ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ Lifecycle responsibility remains contract-specific.

Sources & Evidence

1. Arab Tanker Services and Contracting L.L.C. - Your Trusted Oilfield Partner
   · ATS reports cable services, ADNOC approval and a Lightning Project DP2 repair-barge build-and-operate contract; Q4 2025 is a delivery target, not confirmation. ([atsuae.ae](https://www.atsuae.ae/))

23.98. CCC (Underwater Engineering) S.A.L.

▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪L.'s 2022 profile documents an owned cable-laying spread, DP2 support vessels, and an Abu Dhabi yard and jetty supporting cable handling and subsea services. Consolidated Contractors' corporate directory identifies the Abu Dhabi operation, but the historical asset list is not a current vessel commitment.

▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ Appointment should require a current vessel assignment, equipment inventory and contracting-entity confirmation. Company-controlled equipment can consolidate accountability only where the package covers its interfaces; separately chartered or customer-supplied platforms need explicit integration and acceptance responsibilities.

Sources & Evidence

1. CCC (Underwater Engineering) S.A.L. - Company Profile - 2022
   · CCC's 2022 company profile documents owned cable-laying equipment, DP2 support vessels, subsea services and an Abu Dhabi yard and jetty. It is historical asset evidence. ([energyconnects.com](https://www.energyconnects.com/media/itrkvv5g/ccc-underwater-engineering-xx.xx-xx.xx-xx.xx-2022_20-xx.xx-xx.xx.pdf))
2. Connect with us | Building Legacies, Honoring Values | CCC
   · Consolidated Contractors' corporate directory identifies a CCC (Underwater Engineering) SAL operation at its Mussafah yard in Abu Dhabi; the directory does not allocate a current cable mission. ([ccc.net](https://www.ccc.net/connect-with-us/))

23.99. Qatar Navigation Q.P.S.C.

Qatar Navigation Q.P.▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪

[redacted] Those positioning and ownership entries do not identify an accepted cable-laying package on that vessel.

For installation packages involving Qatar's offshore infrastructure, Milaha is relevant where engineering, marine support and vessel modifications must be coordinated. Selection should connect the actual cable-work responsibility to a named vessel, mission equipment and contracting counterparty, rather than infer installation readiness from Milaha or Halul branding. [redacted]

Sources & Evidence

1. Engineering Services | Milaha
   · Milaha identifies Qatar Navigation Q.P.S.C. in Doha and reports delivered cable-laying and burial, turnkey EPCIC, vessel-retrofitting and marine-spread scopes.
   ([milaha.com](https://www.milaha.com/en/business-area/engineering-services))
2. Subsea Services | Milaha
   · Milaha offers ROV-supported and geophysical survey services and describes subsea and offshore-facility work supporting Qatar's energy supply chain.
   ([milaha.com](https://www.milaha.com/en/business-area/subsea-services))
3. Milaha | Fleet List
   · Milaha lists Halul xx.xx under DP2 multipurpose support vessels and supplies vessel-level ownership information. That entry does not identify an installed or accepted cable-laying package.
   ([milaha.com](https://www.milaha.com/en/fleet-list))

23.100. Pina Underwater Services Ltd

[redacted] Its service offering covers telecommunications and power-cable installation and maintenance alongside diving, ROV and underwater-construction services. These references establish reported contractor participation, not the precise extent of prime installation responsibility.

[redacted] Specialist support may fit a broader buyer-managed campaign; procuring a complete vessel package requires separate asset and acceptance

commitments. Bosphorus references should not be extrapolated into unrestricted or deepwater vessel capability.

Sources & Evidence

1. References - Pina Underwater Services Ltd
   · Pina reports February 2026 Bosphorus cable-crossing installations for Exa Infrastructure Turkey, March 2026 preventive maintenance for TurkNet and September 2025 electrical-cable repair for Metro Istanbul. ([pinaunderwater.com](https://pinaunderwater.com/references))
2. Services - Pina Underwater Services Ltd
   · Pina offers telecommunications and power-cable laying, surveillance, repair and maintenance alongside ROV, diving and underwater-construction services. ([pinaunderwater.com](https://pinaunderwater.com/services/))
3. Equipment List - Pina Underwater Services Ltd
   · Pina's equipment page identifies Deep Blue as a dive boat and lists marine cable laying, without specifying a platform's ownership arrangement or accepted laying configuration. ([pinaunderwater.com](https://pinaunderwater.com/equipment-list/))

23.101.Ocean Diving & Marine Services W.L.L.

Ocean Diving & Marine Services W.L.[redacted] These are identifiable local support platforms; their published descriptions do not establish a complete cable-handling installation package.

An installation contractor operating in Bahrain can evaluate the company for a defined civil, diving, or support-barge scope. [redacted] A direct laying-vessel award should require a nominated configured asset, control rights, and customer acceptance, rather than relying on a general-purpose barge listing.

Sources & Evidence

1. Our Services - OCEAN DIVING & MARINE SERVICES BAHRAIN
   · The company lists cable-laying trenches, piling support for cable-laying barges, diving services, and boat/barge hire in its Bahrain marine-work offering. These support evaluating a defined local support package, not assuming complete vessel-installation delivery. ([oceandivingbh.com](https://www.oceandivingbh.com/our-services.html))
2. Our Vessels - OCEAN DIVING & MARINE SERVICES BAHRAIN
   · The advertised hire fleet identifies Ocean xx.xx as a flat-top barge with a crane and Ocean xx.xx as a flat-top barge with spuds. These descriptions identify support platforms but do not document installed cable-handling packages. ([oceandivingbh.com](https://www.oceandivingbh.com/our-vessels.html))

23.102. Streamline International LLC

[redacted] This service breadth supports consideration for a local work package, but its

separate fleet catalogue describes construction machinery and marine cranes rather than an identifiable cable-laying ship or barge.

An installation prime can assess Streamline for the diving and construction interfaces of an Oman cable campaign while contracting the vessel separately. ■■■■ ■■■■■■■■■ ■ ■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■ ■■■ ■■■■■■■■■■ ■■■■■■■ ■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■ ■■■■■ ■■■■■■■■ ■■ ■ ■■■■■■■■■ ■■■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■ ■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■ ■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■■■■■■■■■■■ Advertised maintenance and manning should not be interpreted as a contractual cable-repair readiness commitment.

Sources & Evidence

1. Divers - STREAMLINE INTERNATIONAL LLC Sultanate of Oman
   · Streamline's Oman diving page advertises underwater pipe and cable laying, surveying, construction, and operation, maintenance, and manning. It does not define a contractual cable-repair readiness obligation or identify the laying asset for an installation award. ([streamlineoman.com](https://streamlineoman.com/divers/))
2. Our Fleet - STREAMLINE INTERNATIONAL LLC Sultanate of Oman
   · The fleet catalogue describes construction equipment, including excavators and marine cranes, rather than identifying a cable-laying ship or barge. The catalogue therefore does not substantiate a vessel-led installation package. ([streamlineoman.com](https://streamlineoman.com/our-fleet/))

23.103. Asia Akam Industry

Asia Akam Industry advertises offshore surveying, positioning, ROV operations, and marine-cable and telecommunications installation and maintenance in Iranian offshore waters. ■■■ ■■■■■■■■■ ■■■■■■■■■ ■■ ■■■■■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■ ■■■■ ■■■■■■■ ■■■■■■■■■■ ■ ■■■■■■■ ■■■■■■■■■■

Before awarding a combined package, buyers should require a nominated laying asset, ownership or charter authority, and installation responsibility. Separate vessel procurement makes the asset boundary explicit but adds survey-to-installation interfaces. ■■■ ■■■■■■■■■■■ ■■■■■■■■ ■■■■ ■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■ ■■ ■■■■■■■■■■■■ ■■ ■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■■■

Sources & Evidence

1. Asia Akam Industry | LinkedIn
   · Akam's company profile advertises Iranian offshore survey, positioning, ROV, marine-cable, and telecommunications services, without establishing control or availability of a named laying vessel. ([linkedin.com](https://www.linkedin.com/company/akam-industry))

23.104. Valentine Maritime Gulf L.L.C.

■■■■■■■■■■ ■■■■■■■■■ ■■■■■ ■■■■C.'s published description positions it as an offshore EPC contractor and a charter provider for marine vessels and construction barges in the Arabian Gulf and Indian subcontinent. This indicates a possible construction-led procurement route, but the description's historical fleet narrative does not establish a present cable-laying roster.

■■■■■■■ ■■■■■■■■■■■ ■■ ■■■■■■■■■■■■ ■■■■■■■■■■ ■■ ■■■■■■■■■■■■ ■■■■■ ■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■■ ■■■ ■■ ■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■ ■■■■■■■ ■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■■ ■■■■■■■■■ ■■ ■■■■■ ■■■■■■■■■ ■■■■■

[redacted] Separate asset procurement provides a clearer vessel perimeter; an EPC route centralizes accountability only for obligations actually included. Neither similarly named-company references nor general offshore-construction experience establish the Gulf entity's current mission readiness.

Sources & Evidence

1. Valentine Maritime Gulf L.L.C. | LinkedIn
   · The Gulf company's published description covers regional offshore EPC and marine/construction-barge chartering. Its fleet narrative includes historical milestones and does not establish a present cable-laying roster. ([linkedin.com](https://www.linkedin.com/company/valentine-maritime-gulf-l.l.c.))
2. 2010 MANIFA - LOUIS DREYFUS TRAVOCEAN
   · LD Travocean's 2010 Manifa reference records power-cable laying and trenching from a barge and names Valentine Maritime Saudi Ltd as customer. Assigning that reference to the Gulf entity would require additional entity-specific evidence. ([ldtravocean.com](https://www.ldtravocean.com/project/2010-manifa/))

23.105. Suntech International LLC

[redacted] It records a DP3 barge with cable/pipe-laying certification for specified regional waters and a standby-tug requirement.

Contractors can use this as a managed-barge lead, not proof of unrestricted deployment or availability. [redacted] Operator access does not settle ownership rights or installation accountability.

Sources & Evidence

1. REGISTER OF SHIPS 2024
   · The 2024 register lists Suntech as C MASTER's operator and Asian Pearl Ltd. as owner, records K BARGE DP3, and specifies regional cable/pipe-laying conditions including a standby tug. ([prs.pl](https://prs.pl/wp-content/uploads/2024/xx.xx/rejestr_mor_2024.pdf))

23.106. Keyfield International Bhd

[redacted] Its 2025 annual report describes the asset as a DP2 cable-laying barge designed for underwater power cables and reports deployment to the Middle East.

[redacted] This establishes an owner/lessor proposition, not proof that Keyfield itself supplies complete cable installation. A contractor seeking the barge should confirm charter release, operating responsibility, and project acceptance before making a commitment.

Communications-cable suitability is a separate decision. ▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪ ▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪ Retaining the platform preserves an identifiable asset but leaves mission integration and installation obligations to be expressly allocated.

Sources & Evidence

1. Integrated Annual Report 2025 - Page 150
   - The issuer identifies Keyfield Ventures Labuan as its wholly owned subsidiary and purchaser of the vessel renamed Keyfield Blessing. The group took delivery on April xx.xx 2025, establishing completed asset acquisition rather than an acquisition intention. ([insage.com.my](https://www.insage.com.my/interactiveAR/KEYFIELD/interactiveAR2025/xx.xx/))
2. Integrated Annual Report 2025 - Page 24
   - The 2025 vessel description identifies Keyfield Blessing as a DP2 cable-laying barge designed for underwater power cables, with fiber-optic use presented as retrofit potential. It also reports deployment to the Middle East. ([insage.com.my](https://www.insage.com.my/interactiveAR/KEYFIELD/interactiveAR2025/xx.xx/))
3. Integrated Annual Report 2024 - Page 24
   - The 2024 annual report describes the initial Farasan project plan in Saudi Arabia under a one-year charter with a further one-year extension option, presenting bareboat chartering as a way to limit operational risk. ([insage.com.my](https://www.insage.com.my/interactiveAR/KEYFIELD/interactiveAR2024/xx.xx/))
   - The same disclosure distinguishes the power-cable design from possible fiber-optic retrofit. The owner/installer and installed/potential capability distinctions are analytical implications of the disclosed arrangement. ([insage.com.my](https://www.insage.com.my/interactiveAR/KEYFIELD/interactiveAR2024/xx.xx/))

23.107. Mermaid Subsea Services

Mermaid Subsea Services offers cable installation and repair through an integrated service proposition centered on the Middle East. Its published scope combines installation engineering, surveys, cable transportation, shore and platform connections, and inspection, repair, and maintenance. ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪ ▪▪ ▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪ ▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪

The contracting boundary is important: Mermaid Maritime describes Mermaid Subsea Services as a shared brand used by operating entities, and its office directory distinguishes businesses in Thailand, Qatar, Saudi Arabia, and the United Kingdom. ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ Integrated engineering and vessel access may reduce coordination, but the unsuffixed name does not establish independently attributable assets or obligations outside the parent group.

Sources & Evidence

1. Cable / Flexible Lay | Mermaid Maritime
   - Mermaid Subsea Services describes a Middle East-centered cable offering covering engineering, surveys, transportation, installation, shore and platform connections, and cable inspection, repair, and maintenance. ([mermaid-group.com](https://www.mermaid-group.com/businesses/cable-flexible-lay))

2. Subsea Vessels | Mermaid Maritime
   · Mermaid identifies Millennium xx.xx as a self-propelled DP2 construction-support barge configured for flexible-product and cable laying.
   ([mermaid-group.com](https://www.mermaid-group.com/businesses/subsea-vessels))
3. Business Overview | Mermaid Maritime
   · Mermaid describes integrated operating units using the shared Mermaid Subsea Services brand. Separate contractual and asset attribution cannot be inferred from that brand alone.
   ([mermaid-group.com](https://www.mermaid-group.com/about/business-overview))
4. Contact Us | Mermaid Maritime
   · The official directory distinguishes Mermaid operating businesses in Thailand, Qatar, Saudi Arabia, and the United Kingdom, supporting entity-specific contracting diligence.
   ([mermaid-group.com](https://www.mermaid-group.com/contact-us))

23.108. Maridive and Oil Services

Maridive and Oil Services provides access to cable-related marine capability through its operating group rather than a uniform fleet of dedicated cable ships. ■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■ ■■ ■■■■■■■■■■■■■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■ ■■■■■■ ■■ ■■ ■■■■■■■■■■■■■■■■■■■■■■■■ ■■■■■■■■■ ■■■■ ■■■■■■■ ■■ ■■■■■■ ■■■■■ ■■■■■■■■ ■■■ ■■■ ■■■■■■■ ■■■■ ■■■■■■■■■ ■■■ ■■■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■ ■■■■■■■ ■■■■■ ■■■■■■■■■■■■ ■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■ The published track record includes submarine cable laying at the Amer xx.xx platform.

■■■ ■■■■■■■ ■■■■■■■■ ■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■ ■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■ ■■■ ■■■■■■■ ■■■■ ■■■■■■■ ■ ■■■■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■ ■■■ ■■ ■■■■■■■■■ ■■■■ ■ ■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■■■■ Before selecting an asset or evaluating a conversion requirement, obtain the proposed vessel, installed cable equipment, availability commitment, and contractual division of responsibilities. The published project list is a reference portfolio, not a current vessel assignment.

Sources & Evidence

1. Maridive Company Overview
   · Maridive identifies Maridive and Oil Services as the parent business, distinguishes its offshore-project and offshore-support-vessel arms, and lists offices in Egypt, Saudi Arabia, and the United Arab Emirates.
   ([maridive.com](https://maridive.com/wp-content/uploads/2025/xx.xx/Maridive-Company-Overview.pdf))
   · The overview offers power, fiber-optic, and umbilical cable installation. It supports a group-level offering, not automatic assignment of every capability to the parent legal entity.
   ([maridive.com](https://maridive.com/wp-content/uploads/2025/xx.xx/Maridive-Company-Overview.pdf))
2. Maridive Offshore Projects - General Company Profile
   · Maridive Offshore Projects offers cable-related procurement, shore approaches, installation, subsea surveying, acceptance services, and submarine power-cable repair. Package-boundary implications are analytical conclusions.
   ([maridive.com](https://maridive.com/wp-content/uploads/2022/xx.xx/General-Company-Profile-MOP.pdf))

3. Track Record - Maridive
   · Maridive's track-record page lists submarine cable laying at the Amer xx.xx platform, without identifying a current cable-vessel assignment for that reference. ([maridive.com](https://maridive.com/service/track-record/))

23.109. Petroleum Marine Services

Petroleum Marine Services has a project-backed modification reference linking an existing offshore vessel to cable-laying work. ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪ ▪▪ ▪▪▪▪ ▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪ ▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪ ▪▪▪ ▪▪ ▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪ The case supports demonstrated use of a modified asset for an offshore power-cable mission, not universal suitability across cable families.

The relevant capability combines a marine platform, vessel-modification support, and a specialist subsea partner. ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ West Delta Deep Marine is a completed project reference; availability and customer acceptance for another campaign still require confirmation.

Sources & Evidence

1. Installation of 80 ton main gantry for Maridive 602 unit
   · Alexandria Shipyard records installation of cable and marine-pipeline laying equipment on the PMS-owned Mayo vessel in July 2024. ([alexyard.com.eg](https://alexyard.com.eg/maridive-xx.xx-supply-vessel-project/))
2. PMS Successfully Lays Electrical Cables for Developing Tenth Phase of WDDM Project
   · The August xx.xx 2024 report records completed WDDM phase-ten electrical-cable installation using PMS Mayo and PMS Burullus with DeepTech, and reports Mayo's modification for cable laying. ([egyptoil-gas.com](https://egyptoil-gas.com/news/pms-successfully-lays-electrical-cables-for-developing-tenth-phase-of-wddm-project/))

23.110.West African Ventures

West African Ventures offers seafloor cable laying and trenching within a Nigerian offshore-construction and marine-support portfolio. Its stated delivery model combines vessels, engineering, and turnkey engineering, procurement, installation, and commissioning. ▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪ ▪▪▪▪ ▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪

A cable-system supplier evaluating Nigerian execution support should assess the proposed service base, named vessel, cable-handling configuration, and committed engineering scope together. ▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪▪

[redacted] Award should depend on vessel-specific acceptance and confirmation of which facilities and services the contract commits.

Sources & Evidence

1. Marine Support - WAV
   · West African Ventures expressly includes seafloor cable laying and trenching within its marine-support offering. The page does not tie those services to a named cable-configured vessel. ([waventures.com.ng](https://waventures.com.ng/marine-support/))
2. About - WAV
   · WAV describes service bases at Onne and Warri supporting its own and third-party vessels, dry-dock facilities, and a turnkey engineering, procurement, installation, and commissioning delivery model. ([waventures.com.ng](https://waventures.com.ng/about/))
3. SURF (Subsea Umblicals Riser & Flowline) - WAV
   · WAV offers engineering, procurement, installation, and commissioning of subsea umbilicals, risers, flowlines, and subsea structures, supporting complementary offshore-construction capability. ([waventures.com.ng](https://waventures.com.ng/surf-subsea-umblicals-riser-flowline/))

23.111. Kipo Subsea Ltd

[redacted] Kipo's own construction offering includes subsea cable laying and trenching supported by engineering and specialist personnel. Its collaboration with Bolpex Energy International provides a documented route into marine-construction packages: Bolpex describes Kipo as its specialist cable-laying and underwater-diving partner.

The defensible selection case is a defined subsea package, not an assumed supply of dedicated cable-vessel capacity. An EPC contractor can evaluate Kipo for installation, protection, and underwater support while separately establishing who supplies and controls the vessel. [redacted]

Sources & Evidence

1. Our Structure | Tentanda Energies
   · Tentanda Energies identifies Kipo Subsea Ltd as its wholly owned Nigerian subsidiary and lists cable laying, diving, marine-vessel operations, and ROV operations as principal activities. ([tentandaenergies.com](https://tentandaenergies.com/our-structure))
2. Subsea Construction - Welding, Trenching & Offshore Support | Kipo Subsea
   · Kipo offers subsea cable laying, cable trenching, offshore support, engineering, project management, and specialist personnel. These are service capabilities, not proof of a dedicated vessel commitment. ([kiposubsea.com](https://kiposubsea.com/pages/subsea-construction.html))

3. Marine Division | Bolpex Energy International
   · Bolpex identifies Kipo as its specialist cable-laying and underwater-diving partner within a broader marine-construction offering. The relationship does not establish Kipo's ownership of Bolpex-accessible vessels. ([bolpex.com](https://bolpex.com/pages/marine.html))

23.112. VNC Offshore Limited

[redacted] This identifies an outfitting proposition, not a completed, accepted cable-laying configuration. The company also distinguishes its marketed vessels from partner vessels, making control of the nominated asset a material contracting question.

[redacted] A manager can preserve flexibility in asset sourcing; separating management from equipment integration also leaves coordination responsibilities to be allocated. A named accepted configuration and binding availability commitment should precede a commitment dependent on cable-laying capability.

Sources & Evidence

1. Services - VNC OFFSHORE
   · VNC describes DP2 dive-support and cable-laying platforms as capable of being outfitted for cable laying, and distinguishes marketed company vessels from partner vessels. Installed cable capability is not established by this catalog description. ([vncoffshore.com](https://vncoffshore.com/services/))
2. About Us - VNC OFFSHORE
   · VNC identifies its business as ship management and offshore-vessel support serving Nigeria and other African countries, supporting evaluation as a regional management provider. ([vncoffshore.com](https://vncoffshore.com/about/))

23.113. Hydrodive Group

[redacted] Its fleet description identifies HD Enterprise as a DP2 multipurpose support vessel with mooring capability, while its service portfolio covers subsea structures, tie-ins, inspection, and repair. Offices in Lagos and Port Harcourt provide a regional commercial presence; they do not establish an unrestricted international cable-vessel support network.

For a cable contractor, Hydrodive's documented capabilities support assessment of defined subsea or marine-support packages. [redacted] Procurement should therefore

follow a substantiated mission proposal and confirmed availability rather than a historical vessel label or general DP designation.

Sources & Evidence

1. Our Vessels | Hydrodive Group
   · Hydrodive identifies HD Enterprise as a DP2 multipurpose support vessel with mooring capability and lists Lagos and Port Harcourt offices. Its fleet description does not establish a current cable-laying configuration. ([hydrodive.com](https://www.hydrodive.com/vessels))
2. Our Services | Hydrodive Group
   · Hydrodive offers engineering, vessels, diving, ROV services, subsea tie-ins, structure installation, inspection, and repair. These support defined offshore-service packages without establishing a vessel-specific cable mission. ([hydrodive.com](https://www.hydrodive.com/services))

23.114. Mertech Marine

Mertech Marine offers telecommunications-cable recovery, freighting, route surveys and relaying, supported by a marine fleet and a recycling facility in Gqeberha, South Africa. Its combination of marine work and shoreside cable handling gives cable owners a lifecycle-service option when assessing retirement or potential reuse. ■■■■ ■■■■■■■■■■■■ ■■■■■■ ■■ ■■■■■■■■■■■■■ ■■■■ ■■■■■■■■■■ ■ ■■■ ■■■■■■■■■■■■ ■■■■■■ ■■ ■■■■■■■■ ■■■■■■■■■■■■■ ■■■■ ■■■■■■■■■■■ ■■■■■■■■■■

The published Aniek asset sheet identifies Aniek Shipping BV as owner and WIND BV as commercial and technical manager. ■■■■■ ■■■■■■■■ ■■■■■ ■■■■■■ ■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■ ■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■■■■ The sheet is an asset reference, not confirmation of present ownership, availability or an accepted configuration for a new assignment.

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Sources & Evidence

1. Mertech Marine | LinkedIn
   · Mertech describes telecommunications-cable recovery, freighting, route surveys and relay, a marine fleet, a WIND partnership and a recycling facility in Gqeberha. These support the lifecycle-service assessment, not universal cable-mission compatibility. ([linkedin.com](https://www.linkedin.com/company/mertech-marine/))
2. Facts mv Aniek
   · The Aniek sheet identifies Aniek Shipping BV as owner and WIND BV as commercial and technical manager. It does not establish present ownership or employment availability. ([mertechmarine.co.za](https://mertechmarine.co.za/wp-content/uploads/2019/xx.xx/facts_Aniek_new.pdf))

23.115. GMC Diving

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repair. The company also describes dive vessels and dive trailers; these supporting assets should not be equated with an accepted cable-laying ship.

An installation prime can evaluate GMC for a defined underwater-work package rather than infer complete-vessel delivery responsibility from the service list. ■■■■■■■■■■■■■ ■■■■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■■ ■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■ ■■■■■ ■■■■■■■■■ ■■■ ■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■ ■■■ ■■■■■■ ■■■ ■■■■■ ■■■■■■■■ ■■■■■■■■■■■ GMC's broader installation offering warrants evaluation beyond ship husbandry, while campaign-wide accountability remains contract-specific.

Sources & Evidence

1. About | Commercial Diving Services | GMC Diving
   - GMC identifies Cape Town as its base and commercial diving, subsea cable laying, underwater construction and maintenance as specialties. These establish the advertised orientation rather than complete-vessel supply. ([gmcdiving.com](https://gmcdiving.com/about/))
2. Our Commercial Diving Services | GMC Diving
   - GMC advertises cable-route surveys, installation, burial, post-lay inspection, repair and maintenance, and describes dive vessels and trailers. Distinguishing this work package from accepted cable-vessel delivery is an analytical implication. ([gmcdiving.com](https://gmcdiving.com/services/))

23.116.STAPEM Offshore

STAPEM Offshore combines marine and subsea project services with operating infrastructure at the Sonils base in Luanda and the Kwanda base in Soyo. Its corporate materials describe multidisciplinary engineering, procurement, construction, commissioning and maintenance, complemented by Film-Ocean's ROV inspection and intervention capabilities within the group. ■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■ ■ ■■■■■■■■ ■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■ ■■■■■■■■■■■■

STAPEM describes Angola workshops servicing safety equipment under classification-body and manufacturer approvals. ■■■■■ ■■■■■■■■■■ ■■■■■■■ ■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■ ■■ ■■■■■■■ ■■■■■■■■■■■■■■ ■■■■■■■■■ ■■ ■■■■■■■ ■■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■

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Sources & Evidence

1. About us - STAPEM Offshore
   - STAPEM describes multidisciplinary project services, facilities at Sonils in Luanda and Kwanda in Soyo, and Film-Ocean ROV inspection and intervention capabilities. The regional support-integrator assessment is a conditional commercial inference. ([stapem-offshore.com](https://www.stapem-offshore.com/the-group/about-us.html))

2. Certified workshops - STAPEM Offshore
   · STAPEM describes Angola workshops servicing safety equipment with classification-body and manufacturer approvals. Their stated scope does not establish general cable-handling equipment support or integrated mission approval. ([stapem-offshore.com](https://www.stapem-offshore.com/assets-and-technical-means/certified-workshops.html))

23.117.Swell Marine Services

Swell Marine Services expressly advertises submarine-cable installation and burial alongside bathymetry, underwater topography and port-construction work. ■■■ ■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■ ■■■■■■■■■■ ■■■■■■■ ■■■ ■ ■■■■■■■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■■■■■■■■ ■■■■■ The combination supports evaluation for a defined underwater package associated with Moroccan port or cable-landing works, without assuming a particular vessel configuration or cable family.

Before appointment, an installation prime should establish comparable cable references, mobilization resources, personnel qualifications and responsibility for the laying platform and acceptance documentation. ■■■■■■■■■■■■ ■■■ ■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■ ■■ ■■■ ■■ ■■■■■■■■■■ ■■■■■■■■■ ■ ■■■■■■■■ ■■■■■■■■■■■■■■■ ■■■■■■ A specialist package can retain flexibility in vessel selection; the trade-off is that the buyer or prime must explicitly manage interfaces between the underwater contractor and the vessel provider.

Sources & Evidence

1. Services - Swell Marine
   · Swell lists submarine-cable installation and burial, bathymetry, underwater topography and port-construction work. These support evaluating a defined underwater package, not assuming a complete cable-vessel configuration. ([swell-marine.com](https://swell-marine.com/fr/services/))
2. Who we are - Swell Marine
   · Swell describes a commercial-diving and marine-construction team and identifies a Casablanca address. This supports the geographic orientation, without establishing mobilization availability or acceptance for a specific campaign. ([swell-marine.com](https://swell-marine.com/fr/who-we-are/))

23.118.Seaworks Maroc

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The cabling description is broader than a cable-vessel specification and does not establish the cable family, mission equipment or allocation of installation responsibility. ■■■■■■ ■■■■■■ ■■■■■■■■■ ■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■ ■■■ ■ ■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■ ■■■■■■■■■ ■ ■■■■■■■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■ ■■■ ■■■■■■ ■■■■■■■■ ■■■■■ ■■■■■■■■■■■ ■■■ ■■■ ■■■■■ ■■■■ ■■■■■■■■■■■ ■■■■■■■■

RESEARCH SAMPLE REPORT

[redacted] The published cabling offer is not evidence that the company lacks cable activity.

Sources & Evidence

1. Seaworks Maroc - Expertise et Travaux de réparation sous-marines
   · Seaworks includes harbor development, cabling, inspection, damage assessment and underwater repairs in its published offering. The cabling description does not specify a cable family or vessel-responsibility arrangement. (seaworksmaroc.com)
2. Services - Seaworks Maroc
   · Seaworks describes underwater inspection and repair and maintenance of port infrastructure. Combining these with a cable-related local works package is an analytical option requiring cable-specific qualification. ([seaworksmaroc.com](https://seaworksmaroc.com/services/))
3. Contact - Seaworks Maroc
   · The company contact page identifies an Agadir location. This establishes a published local contact point, not unrestricted geographic delivery coverage. ([seaworksmaroc.com](https://seaworksmaroc.com/contact/))

23.119.Joph Oil Ghana Limited

[redacted] Its cable-related offerings include burial-depth surveys and ROV touchdown monitoring.

A cable-installation prime can assess Joph for Ghana-based vessel and subsea support, subject to documented asset availability, partner authority and acceptance obligations. [redacted] Survey and monitoring services do not establish principal cable-laying responsibility.

Sources & Evidence

1. Company Profile for Joph Oil Ghana Ltd
   · Joph describes partner-backed vessel sourcing and management through Arus Jaya, Accra and Tema offices, cable burial-depth surveys and ROV touchdown monitoring. ([jophoil.com](https://jophoil.com/wp-content/uploads/2021/xx.xx/Company-Profile-for-Joph-Oil-Ghana-Ltd.pdf))

23.120. MarineServ West Africa

MarineServ West Africa describes a Nigerian marine-services business affiliated with Marine Service & Supply Co. [redacted] These disclosures identify a potentially broader role than logistics alone, but do not allocate a named cable asset to a particular owner or contracting entity.

For a Nigerian cable campaign, buyers can screen MarineServ for a combined survey, logistics and vessel-access proposal. [redacted]

Combining local services may simplify coordination; directly contracting the vessel owner offers a different accountability route while leaving regional support to be arranged separately.

Sources & Evidence

1. MarineServGroup - Marine Solutions
   · MarineServ identifies a Nigerian business affiliated with Marine Service & Supply Co. Inc., advertises survey and cable-laying vessels, and describes offshore survey, positioning, marine logistics and procurement services. The page does not identify the relevant cable asset. (marineservgroup.com)
2. About Us - MarineServGroup
   · MarineServ reports owning vessels and dredgers and describes shipping, survey, logistics and procurement capabilities. These are company-reported assets and offerings, not proof of a named cable layer's configuration or availability. ([marineservgroup.com](https://marineservgroup.com/about/))

23.121. Southern Engineering Co. Ltd

Southern Engineering Co. ■■■ ■■■■■■■■■ ■ ■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■ ■■■■■ ■■■■■■■■ These capabilities are relevant to platform work and refurbishment within cable-vessel procurement.

Buyers should require comparable vessel references, facility fit and class-coordination responsibilities before shortlisting a hull-work package. ■■■■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■■■■■■■■■■ ■■■■■■■■■■■■■■ ■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■■■■ ■■■■■ ■■■■■■■■■■■■■■■ Regional engineering access is the benefit; retaining cable-system integration responsibility is the trade-off unless the proposed contract demonstrably includes it.

Sources & Evidence

1. Southern Engineering Co. Ltd (SECO) | LinkedIn
   · SECO describes a Mombasa shipyard, East African delivery, shipbuilding, conversion, drydocking, repair, fabrication and mechanical engineering; cable-system delivery is not established by these general capabilities. ([ke.linkedin.com](https://ke.linkedin.com/company/southern-engineering-co.-ltd))

23.122. ASEAN Cableship Pte Ltd

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■■■ ■■■■■■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■ ■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■■ ■■■ ■■ ■■■

[redacted] Installation customers should separately establish the required cable compatibility and mission equipment. A broader service package can consolidate interfaces, but only the obligations expressly covered by the contract transfer to ACPL.

Sources & Evidence

1. CS ASEAN Restorer
   · ACPL's ASEAN Restorer particulars state Singapore flag registration and DP1 classification. Published particulars do not replace confirmation of the nominated vessel's applicable acceptance documentation. ([aseancableship.com](https://www.aseancableship.com/our_resources/cs-asean-restorer/))
2. Our Services - Cable System Company Singapore | ASEAN Cableship
   · ACPL offers installation, shore-end work for optical-fiber and power cables, engineering consultation, and zone-based, dedicated, shared dedicated, and ad hoc maintenance arrangements. Contractual access implications are analytical. ([aseancableship.com](https://www.aseancableship.com/our-services/))
3. About Us - Cable System Company Singapore | ASEAN Cableship
   · ACPL describes submarine cable repair experience extending from Djibouti to Guam and from Taiwan to Australia. This is company-reported geographic experience, not a contractual availability guarantee. ([aseancableship.com](https://www.aseancableship.com/about-us/))
4. CS ASEAN Explorer - Cable System Company Singapore | ASEAN Cableship
   · ACPL's ASEAN Explorer particulars state Indonesian flag registration and DP2 classification, establishing a different published configuration from ASEAN Restorer. ([aseancableship.com](https://www.aseancableship.com/our_resources/cs-asean-explorer/))

23.123. PT Ketrosden Triasmitra Tbk

[redacted] That is evidence of a reported installation milestone, not a claim that the entire Jakarta-Singapore system had entered service. Its contractor offering also includes route studies, permitting coordination, procurement, and project management.

[redacted] Vessel and mission-equipment suppliers can assess requirements associated with the existing converted asset, but should not infer a new vessel acquisition from the company's cable-development plans. Internal employment provides an identifiable use case while potentially competing with outside customers for scheduling.

Sources & Evidence

1. Bentang Bahari - DP-2 Cable Laying Vessel
   · Bentang Bahari's official particulars describe Indonesian registration, DNV classification, DP2 positioning, conversion in 2025, and fiber-optic cable installation and repair services. (bentangbahari.com)
2. Triasmitra Gelar Konferensi Pers Proyek Kabel Laut Rising 8
   · Triasmitra's January 2026 Rising xx.xx announcement identifies PT Jejaring Mitra Persada as the subsidiary executing the installation with Bentang Bahari. ([triasmitra.com](https://triasmitra.com/index.php/news-updates/news/triasmitra-gelar-konferensi-pers-proyek-kabel-laut-rising-xx.xx))
3. Triasmitra
   · Triasmitra's June xx.xx 2026 update reports completion of Jakarta-Batam cable laying in May 2026 and describes further Rising xx.xx inspection and burial work, prospective Merindo deployment in 2027, and external assignments. Scheduling competition is a conditional implication, not proof of unavailable capacity. ([triasmitra.com](https://triasmitra.com/index.php/news-updates/news/triasmitra-catat-laba-bersih-tumbuh-xx.xx-dan-targetkan-pendapatan-rp101-triliun-pada-2026))
4. Triasmitra - Contractor
   · Triasmitra offers submarine fiber-network route studies, permitting coordination, system design, procurement, and project management. ([triasmitra.com](https://triasmitra.com/index.php/services/contractor))

23.124. Prima Navalink

Prima Navalink has adopted SOLWAKE as its corporate brand. The company's announcement states that vessel-owning entities, operations, and contractual arrangements remain unchanged, so the branding change should not be treated as proof of a legal ownership transfer. [illegible]

The consortium relationship provides a commercial access route distinct from simply selecting a vessel. Telkominfra describes standby maintenance for TELKOM and TELIN and spare-cable depot support in Makassar. [illegible]

Sources & Evidence

1. Solwake - Official Company Updates
   · The official company announcement states that Prima Navalink is now SOLWAKE and that the corporate rebranding leaves vessel-owning entities, operations, and contractual arrangements unchanged. ([id.linkedin.com](https://id.linkedin.com/company/solwake))

2. SOLWAKE | Fleet - Prima Nusantara X
   · SOLWAKE describes Prima Nusantara X as an Indonesian-flagged DP2 cable-laying and offshore-support vessel with cable-handling equipment and a work-class ROV, and attributes its 2023 conversion to Multi Ocean Shipyard. ([solwake.com](https://solwake.com/fleet_pnx))
3. Submarine Cable Services | Telkominfra
   · Telkominfra documents consortium deployment of Prima Nusantara X and Navalink Polaris from 2024, standby maintenance for TELKOM and TELIN, and spare-depot support in Makassar. These are consortium services, not automatically obligations of Prima's vessel-owning entities. ([telkominfra.co.id](https://telkominfra.co.id/porto/submarine-cable-services))

23.125. TAMS Group

TAMS has a documented nearshore cable-installation role combining adaptable marine plant with commercial diving and subsea construction. In its City Beach, Perth project for LD Travocean, TAMS reports using Robert Purnell as the installation barge with a client-supplied modular DP system and cable-lay spread. ■■■ ■■■■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■ ■■■ ■■■■■■■■ ■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■ ■■■■ ■■■■■■■■■■■■ ■ ■■■■■■■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■ ■■■ ■ ■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■■■

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Sources & Evidence

1. Subsea Services | TAMS
   · TAMS reports completed nearshore fiber-optic work for LD Travocean at City Beach, Perth, using Robert Purnell with client-supplied modular DP and cable-lay equipment, followed by handover to an offshore cable-laying vessel. ([tamsgroup.com.au](https://www.tamsgroup.com.au/capabilities/subsea-services/))
2. Shore Bases | TAMS
   · TAMS identifies shore bases including Fremantle, Broome, and Gladstone, supporting workforce deployment, vessel servicing, pre-construction staging, and equipment mobilization. ([tamsgroup.com.au](https://www.tamsgroup.com.au/shore-bases/))

23.126. Ocean Engineering Systems

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The offering warrants project-specific qualification, not automatic treatment as a commissioned DP vessel. ■ ■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■ ■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■■■■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■ ■■■■■■ ■■■■■■■

■■■■■■■■■■■ Bundled shore works may consolidate interfaces; a vessel-only package leaves more coordination with the buyer, including handover to the offshore contractor.

Sources & Evidence

1. Shore Approach Construction, Pipeline Shore Approach, Cable Laying - Ocean Engineering Systems
   · OES offers bundled nearshore construction and cable laying, identifying Anaconda as a cable-lay barge with prospective DP outfitting. The undated description does not establish commissioning. ([oes.net.au](https://www.oes.net.au/pipeline-construction-shore-approaches.shtml))

23.127. Quest Maritime Services

Quest Maritime Services advertises shallow-water cable laying and dynamic positioning alongside workboat charter, survey support, diving support, and nearshore logistics. Its stated charter coverage extends along Western Australia and through Darwin to Brisbane. ■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■ ■■■■■■■■■ ■ ■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■ ■■■■ ■■ ■■■■■■■■ ■■■■ ■■■■■■ ■■■■■■ ■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■ ■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■ ■■■ ■■ ■■■ ■■ ■■■■■■■■■■ ■■■■■■■■■ ■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■■ ■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■

For an installation prime, Quest is therefore a candidate for Australian survey, local marine support, or a specifically qualified shallow-water package. A cable-laying award should remain conditional on nomination of the actual vessel and handling equipment, applicable positioning documentation, executed project references, and clear responsibility for the installation outcome. ■ ■■■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■ ■■■■ ■■■■■■■■ ■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■ ■■■■■■■■■■ ■■■■ ■■■■ ■■■■ ■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■ ■■■■■■■ ■■ ■■■■■■■■ ■■■■ ■■■ ■■■■■■■■ ■■■■■■■

Sources & Evidence

1. Quest Maritime Services | Services
   · Quest advertises shallow-water cable laying, dynamic positioning, charter, survey, diving support, and nearshore services, with charter coverage along Western Australia through Darwin to Brisbane. ([questmaritimeservices.com.au](https://questmaritimeservices.com.au/services/))
2. Quest Maritime Services | Offshore Surveyor - DP Dynamic Positioning / Hydrographic / Multi-Purpose Vessel
   · Quest describes Offshore Surveyor as a hydrographic and multipurpose vessel equipped with DP1, an A-frame, deck winch, crane, and survey facilities. Its described support equipment does not establish an installed cable-lay package. ([questmaritimeservices.com.au](https://questmaritimeservices.com.au/vessel/dp-hydrographic-multi-purpose-vessel/))

23.128. Dong Fang Offshore Co., Ltd.

Dong Fang Offshore combines cable-vessel assets with power-cable installation and repair, nearshore support, telecommunications cable services, and onshore cable logistics. ■■ ■■■■■ ■■■■■■ ■■■■■■■■■■ ■■ ■ ■■■ ■■■■■■■■■■■■■■■■■■ ■■■■■■ ■■■■ ■ ■■■■■■■■■■ ■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■ ■■■■■■■ ■■ ■■ ■■■■■■■■■■■ ■■■■■■■■ ■■ ■■■■■■■■■ ■■ ■■■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■

RESEARCH SAMPLE REPORT

[redacted] These references support a tangible asset and project capability without establishing superior performance across every mission.

[redacted] A customer seeking this vessel should verify booking authority, release rights, mission configuration, and the division of responsibilities between DFO and the charterer before committing a campaign. The arrangement connects the vessel with DeepOcean's engineering and subsea resources, but makes availability a contractual question rather than an inference from ownership.

A separate Westcon Yards project should be treated as future delivery rather than operating capacity. [redacted] Customers considering that addition should make deployment conditional on completed delivery and mission acceptance, while retaining an alternative asset plan if the required campaign precedes readiness.

Sources & Evidence

1. Offshore Wind Cable Installation Services | DeepOcean
   · DeepOcean reports completion of TPC-II inter-array cable installation offshore Taiwan in collaboration with DFO in 2026. This project statement does not identify Orient Adventurer as the executing vessel. ([deepoceangroup.com](https://www.deepoceangroup.com/what-we-do/markets-renewables-cable-installation))
2. Submarine Cables - Services and Fleet - Dong Fang Offshore Co., Ltd.
   · DFO offers power-cable installation and repair, nearshore support, telecommunications cable services, and onshore cable logistics and storage. These are company-described offerings rather than independently established performance outcomes. ([dfo.com.tw](https://www.dfo.com.tw/en/service/services/Submarine-cables/))
3. Orient Adventurer - Dong Fang Offshore Co., Ltd.
   · DFO lists Orient Adventurer as a cable-installation vessel with DP3 positioning and a work-class ROV. The description establishes a published asset capability, not unrestricted commercial availability. ([dfo.com.tw](https://www.dfo.com.tw/en/service-detail/Orient-Adventurer/))
4. Orient Adventurer - Dimension Case Study
   · Dimension reports completing design, engineering, installation, and commissioning of Orient Adventurer's spooling-arm and cable-lay hatch package at ST Engineering Shipyard, Singapore, in 2025. ([dimension.sg](https://dimension.sg/case-studies/orient-adventurer-spooling.html))
5. DeepOcean Adds Orient Adventurer to Its Advanced Subsea Fleet
   · DeepOcean's January xx.xx 2025 announcement records a signed DFO charter for Orient Adventurer specifying early 2026 through the end of 2027 and extension options, combined with DeepOcean engineering and subsea resources. Actual booking and release rights require contract verification. ([deepoceangroup.com](https://www.deepoceangroup.com/articles/deepocean-adds-orient-adventurer-to-its-advanced-subsea-fleet))
6. Design and Engineering Contract with Westcon Yards AS - Breeze Ship Design
   · Breeze announced a signed Westcon Yards design and engineering agreement on January xx.xx 2026, for a subsea and cable-laying vessel scheduled for delivery to DFO in the first quarter of 2027. This establishes an announced delivery target, not completed capacity. ([breeze.no](https://breeze.no/2026/xx.xx/xx.xx/design-and-engineering-contract-with-westcon-yards-as/))

23.129. ATE Energy International Co., Ltd.

ATE Energy International Co., Ltd. offers cable-laying and offshore maintenance services within its marine-engineering business. ■■■■■■■ ■ ■■■■■■■ ■■ ■■■■■■■■■ ■■ ■■■■■■■■■ ■■■ ■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■ ■■■■■■■■■ ■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■ ■■■■■■■■■■■■■■ ■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■ ATE's Submarine Cables Department oversees deployment and cable-lay activities.

■■■ ■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■■ ■■■■ ■■■■■■ ■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■ ■■■■■■■■■■■ ■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■ ■■■■■■■ ■■ ■■■■■■■ ■■■■■■ ■■■ ■■■■■■ ■■■■■■■■■■ Delivery reporting identifies Co-Asia Marine Technology as the vessel owner; buyers should therefore verify the registered holding entity and ATE's contracting authority before reserving an installation window. ATE offers a locally based coordination route, but vessel arrival alone does not establish a completed customer assignment, unrestricted availability, or authorization for deployment elsewhere.

Sources & Evidence

1. ATE Energy Company Presentation
   - ATE's company presentation lists cable laying and offshore maintenance services within its marine-engineering offering.
2. ATE Energy's OCEANUS 1 enters service for offshore cable operations
   - The September xx.xx 2026 joint announcement reports OCEANUS xx.xx's September xx.xx arrival in Kaohsiung after handover and identifies its DPS-xx.xx cable-lay configuration.
   - ATE oversees deployment; Synergy provides technical and crew management; Mermaid project-management participation remains conditional on awards and final contracts.
3. VESSEL REVIEW | Oceanus 1 - Taiwan's Co-Asia Marine Technology acquires cable layer with 8,000-tonne capacity
   - September xx.xx 2026 delivery coverage identifies Co-Asia Marine Technology as OCEANUS xx.xx's owner; this is a reported attribution, not independently inspected registered title.

23.130. Synergy Marine Group

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For a cable-vessel sponsor, this provides a route to outsource marine-management responsibilities while retaining deployment control and separately procuring installation expertise. ■■■ ■■■■■■■■■ ■■ ■■ ■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■ ■■■■■■■■■■ ■■■ ■■■ ■■■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■ ■■■■■■■■■■■■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■ ■■■■■■■■■■■■ Managed vessels should not be

treated as Synergy-owned capacity, and the OCEANUS xx.xx appointment should not be expanded into an assumption that Synergy supplies the complete cable-installation package.

Sources & Evidence

1. ATE Energy's OCEANUS 1 enters service for offshore cable operations
   - Synergy's OCEANUS xx.xx appointment covers technical and crew management through Taiwan-based and regional offices, separately from ATE's deployment oversight.
2. Ship Technical Management
   - Synergy describes technical management covering maintenance planning, compliance, procurement, and performance monitoring, delivered through its Synergy Ship Management capability.
3. Offshore Ship Management Services
   - Synergy's offshore offering includes dynamic-positioning assurance and describes coordination between vessel management and subsea activities.
   - Separating marine management from specialist cable-mission accountability is the profile's commercial inference.

23.131. Pacific Shipbuilding Joint Stock Company

[redacted] Its construction exposure also extends to communications-cable assets: Royal IHC identifies Pacific as its Vietnamese partner yard for CS GENESIS and CS TRIUMPH, which are intended for fiber-optic cable laying and maintenance. The announced delivery targets for those vessels are 2027 and 2028, respectively; they should remain distinct from the delivered OCEANUS xx.xx reference.

The commercial distinction is between shipyard execution and proprietary mission-system capability. Royal IHC's participation provides a defined design and mission-equipment partner, making Pacific relevant to buyers considering a specialist-led construction network. [redacted]

Sources & Evidence

1. Construction begins on CS GENESIS and CS TRIUMPH for OMS Group
   - Royal IHC identifies Pacific Shipbuilding as its Vietnamese partner yard for CS GENESIS and CS TRIUMPH, intended for fiber-optic cable laying and maintenance.
   - The December xx.xx 2025 announcement gives planned deliveries in 2027 and 2028, respectively, and identifies Royal IHC's platform and integrated mission equipment.
2. VESSEL REVIEW | Oceanus 1 - Taiwan's Co-Asia Marine Technology acquires cable layer with 8,000-tonne capacity
   - The dated delivery report identifies Pacific Shipbuilding in Vietnam as the completed OCEANUS xx.xx's builder and reports entry into service in Taiwan.

23.132. Mermaid Maritime Public Company Limited

Mermaid Maritime Public Company Limited offers a service-led cable proposition through Mermaid Subsea Services, covering installation engineering, transportation, survey, installation, and inspection, repair, and maintenance. ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪ ▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪ Operating entities in Thailand, Saudi Arabia, Qatar, the United Kingdom, and Malaysia provide identifiable regional contracting and support locations, without establishing that every location supplies the same cable capability.

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Sources & Evidence

1. Cable / Flexible Lay | Mermaid Maritime
   - Mermaid offers installation engineering, transportation, surveys, cable installation, and subsea cable inspection, repair, and maintenance.
   - Its described marine spreads include offshore and shallow-water assets, with a Middle East geographic focus.
2. Contact Us | Mermaid Maritime
   - Mermaid's official directory identifies operating entities in Thailand, Saudi Arabia, Qatar, the United Kingdom, and Malaysia; it does not establish equivalent cable capability at every location.
3. Mermaid Maritime - 2Q 2026 Results, August 11, 2026
   - Mermaid's August xx.xx 2026 issuer presentation identifies Millennium xx.xx supporting Middle East cable-lay campaigns during the second quarter and separately reports the M3JV relationship.
   - The presentation distinguishes owned and chartered subsea activity and attributes a Cable Lay segment loss to a delayed lump-sum project.

23.133. Penta-Ocean Construction Co., Ltd.

Penta-Ocean Construction Co., Ltd. combines marine-construction capabilities with a cable-laying-vessel program intended to extend its power-cable installation offering. ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ These are construction-stage capabilities, not evidence of a delivered newbuild.

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[redacted] A developer evaluating Penta-Ocean for a future installation award should distinguish existing marine-construction credentials from newbuild-dependent capability and establish who assumes cable-system acceptance, commissioning, and operating responsibility. A prime-contractor route may centralize customer coordination, but only the actual contract can determine which co-owner and specialist obligations are included.

Sources & Evidence

1. Notice regarding Construction of a Cable Laying Vessel (CLV)
   - Penta-Ocean's construction announcement identifies planned bottom-fixed wind, floating wind, and submarine direct-current cable applications.
   - It separates vessel and mission-equipment ownership arrangements and designates Kojimagumi for operational management.
2. Steel Strike Milestone for Heavy Lift Vessel (HLV) and Cable Laying Vessel (CLV)
   - Penta-Ocean reports cable-vessel fabrication beginning at Batam on October xx.xx 2025, with February 2028 completion and delivery scheduled.
3. Penta-Ocean Construction Medium-Term Management Plan, May 8, 2026
   - Penta-Ocean's May xx.xx 2026 management plan identifies the cable-laying vessel as under construction and retains February 2028 as its completion target.

23.134. Fuyo General Lease Co., Ltd.

[redacted] The announced arrangement provides for future joint ownership of the cable-laying vessel by Fuyo and a Penta-Ocean subsidiary. Penta-Ocean's May 2026 plan continued to identify a February 2028 completion target, so the arrangement should not be presented as ownership of an already delivered asset.

Fuyo's broader offering includes leasing, renewable-energy business finance, and cross-border financing, providing relevant structuring capabilities rather than proof of cable-installation execution. [redacted] A financing agreement is therefore not a substitute for confirmed vessel delivery, operating capability, or the authority to commit the asset to a customer's campaign.

Sources & Evidence

1. Notice Regarding Joint Ownership of Large Work Vessels for Offshore Wind Construction
   - The January xx.xx 2025 joint announcement establishes a signed basic agreement covering construction responsibilities and post-completion vessel management and charter operations.
   - Joint ownership by Fuyo and a Penta-Ocean subsidiary is described as occurring after vessel completion.
2. Penta-Ocean Construction Medium-Term Management Plan, May 8, 2026
   - The May 2026 investment plan continues to associate Fuyo with the cable-vessel ownership arrangement while showing February 2028 completion, not delivered-asset ownership.

3. Products and services | Fuyo General Lease Co., Ltd.
    - Fuyo offers leasing, renewable-energy business financing, and cross-border financing.
    - These general offerings support a financing-capability assessment, not automatic suitability or approval for a particular cable-vessel transaction.

23.135. PaxOcean Group

PaxOcean Group provides newbuilding, conversion, repair, and integrated marine-engineering services through yards in Singapore, China, and Indonesia. [redacted] This establishes a cable-vessel construction program, not a completed operating reference for that newbuild.

[redacted] Procurement should specify the contracted PaxOcean entity, owner-supplied equipment boundaries, mission-system integration, warranty interfaces, and final acceptance responsibility. Buyer-managed specialist packages preserve equipment choice but retain coordination exposure; broader yard responsibility is preferable only when those interfaces are expressly covered.

Sources & Evidence

1. Notice regarding Construction of a Cable Laying Vessel (CLV)
    - The construction announcement allocates vessel design to Salt Ship Design, shipbuilding to PaxOcean, and trencher and work-class ROV supply to SMD.
2. Steel Strike Milestone for Heavy Lift Vessel (HLV) and Cable Laying Vessel (CLV)
    - Penta-Ocean assigns hull construction and outfitting, including cable-laying equipment, to PaxOcean's Batam yard; the stated February 2028 delivery remains a target.
3. PaxOcean Inks Contract with Penta-Ocean Construction for Cable Laying Vessel
    - PaxOcean confirms its Penta-Ocean cable-vessel contract and identifies Batam as the construction yard.
    - Its company description identifies yards in Singapore, China, and Indonesia and services including newbuilding, integrated solutions, repair, and conversion.

23.136. Toyo Construction Co., Ltd.

Toyo Construction Co., Ltd. has a delivered asset reference following DISCOVERY's June xx.xx 2026 handover at Vard Langsten in Norway. [redacted] Yard acceptance and domestic campaign readiness are therefore different milestones.

DISCOVERY's flexibility makes Toyo relevant to customers considering mixed cable and offshore-construction assignments. The corresponding trade-off is that employment and configuration must be reconciled across missions rather than assuming continuous dedicated cable availability. ■■■■■■ ■■■■■■■■■■ ■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■■■■

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Sources & Evidence

1. Discovery - Purpose-built for Japanese offshore wind market
   - VARD reports DISCOVERY delivered on June xx.xx 2026, with yard outfitting and commissioning completed at Vard Langsten.
   - The vessel has a removable cable-lay system and offshore construction equipment, with its design tailored to Japanese class, flag, and operating requirements.
2. Delivery Ceremony for CLV DISCOVERY Held in Norway
   - Toyo reports DISCOVERY's June xx.xx 2026 handover in Norway and separately identifies delivery sailing, Japan-side final outfitting, and operational preparation.
   - This supports distinguishing yard delivery from domestic campaign readiness.
3. Cable burial technology development for complex domestic seabed conditions selected under the future-oriented new energy demonstration program
   - Toyo announced acceptance of its joint proposal with Kaiyo Engineering under NEDO's 2026 technology development program.
   - The proposal addresses cable burial for complex Japanese seabed conditions and environmental monitoring; acceptance establishes a development initiative, not completed commercial validation.

23.137. MOL Maritex Co., Ltd.

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Its Japan-based DP training center offers courses to external customers, including cable-laying-vessel training, providing a complementary workforce-development capability. ■■■■■■ ■■■■■■■ ■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■ ■■■■■■■ ■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■ ■■■ ■■■■■■ ■■■ ■■■■■■ ■■■■■■■■■■■■ Before commitment, establish who controls campaign scheduling,

cable-task acceptance, equipment support, and charter authorization; training provision does not confer those commercial rights.

Sources & Evidence

1. Cable-Laying Ship Business | Services | MOL Maritex Co., Ltd.
   · MOL Maritex identifies Ocean Link and Cable Infinity as managed vessels, with maintenance and installation roles respectively; Infinity supports communications and power cables. ([mol-maritex.co.jp](https://www.mol-maritex.co.jp/en/services/cableship/))
2. MOL DP Training Center | Services | MOL Maritex Co., Ltd.
   · MOL Maritex offers DP training to external customers from its headquarters, including a cable-laying course; this supports a complementary workforce-development capability. ([mol-maritex.co.jp](https://www.mol-maritex.co.jp/en/services/simulator/index.html))
3. Kokusai Cable Ship and MOL Sign Memorandum of Understanding on Operation of Cable-laying Ships for Offshore Wind Power Generation
   · The collaborative operating model assigns cable handling and laying to KCS and ship management, operation, and seafarer provision to MOL and MOLMEC. ([k-kcs.co.jp](https://www.k-kcs.co.jp/english/news/files/KCS_MOL_collaboration_release_E_20211001.pdf))
4. KDDI オーシャンリンク｜KDDI ケーブルシップ株式会社
   · KCS's Ocean Link vessel record explicitly identifies KCS as owner, supporting separation of ownership from MOL Maritex's management role. ([k-kcs.co.jp](https://k-kcs.co.jp/cableship/ocean_link.html))

23.138. Kojimagumi Co., Ltd.

For future Japanese offshore power-cable campaigns, Kojimagumi presents a prospective vessel-management and underwater-equipment role rather than a shipbuilding proposition. Its December 2024 announcement identifies planned management of Penta-Ocean's self-propelled cable-laying vessel and shared ownership of the associated trencher and work ROV. ■■■■■■■■■■■■■ ■■■ ■■■■ ■■■■■■■■■■ ■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■ ■■ ■■■ ■■■■■■■■■■■■■■■■■ ■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■ ■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■ ■■■■■■■ ■■ ■■■■ ■■ ■■■■■■■■■ ■■ ■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■ ■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■■■■

Developers considering this route should align project commitments with vessel acceptance, equipment commissioning, and operating-team readiness. Contracting should distinguish navigation and marine management from cable handling, burial execution, and cross-system defect responsibility. ■■■■■■■ ■■■■■■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■ ■■■ ■■ ■■■■■■■■ ■■ ■■■■■■■■■■■ ■■■■■■■■ ■■ ■■■ ■■■■■■■■■ ■■■■■■■ ■■ ■■■ ■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■■ ■■ ■■■■■■■■ ■■ ■■■■■■■■ ■■■■■ ■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■ ■■ ■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■ ■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■

Sources & Evidence

1. 洋上風力 | 株式会社小島組
   · Kojimagumi describes planned vessel management and underwater-equipment participation for offshore wind power cables and submarine DC transmission. ([kk-kojimagumi.co.jp](https://www.kk-kojimagumi.co.jp/business/business_offshore-wind/))

2. 洋上風力建設に用いる大型自航式ケーブル敷設船プロジェクトについて

   · Kojimagumi's December xx.xx 2024 announcement identifies prospective vessel management, shared trencher and work-ROV ownership, and a February 2028 vessel-completion target. ([kk-kojimagumi.co.jp](https://www.kk-kojimagumi.co.jp/news/entry-xx.xx.html))

3. 「中期経営計画（2026〜28 年度）」の策定に関するお知らせ

   · Penta-Ocean's May xx.xx 2026 plan retains February 2028 for CLV completion and February 2027 for the trencher and work ROV; these are planned milestones. ([penta-ocean.co.jp](https://www.penta-ocean.co.jp/ir/management/plan/pdf/xx.xx.pdf))

23.139. SEKIKAIJI Industry Co., Ltd.

[redacted] Its company brochure identifies the DPS-equipped Asahi work barge and the Ditch Queen ROV, while group company SEKINAKA provides port-adjacent cable storage and related support. This combination is relevant to buyers seeking coordination between marine work and onshore cable handling, although the marine contractor's obligations and the storage company's responsibilities still require separate contractual definition.

[redacted] Operators should verify commissioned equipment, named assets, reserved availability, and compatible spares before relying on shared standby access instead of dedicated resources. The documented operating assets support contractor capability; the development agreement does not itself establish a readiness guarantee.

Sources & Evidence

1. 海底ケーブルでつなぐ未来と絆 - SEKIKAIJI / SEKINAKA Company Brochure

   · The company-authored brochure identifies Asahi, Ditch Queen, cable installation and repair services, and SEKINAKA's port-adjacent storage and support role. ([pub-mediabox-storage.rxweb-prd.com](https://pub-mediabox-storage.rxweb-prd.com/exhibitor/document/exh-ad073e6d-2066-4ad6-9d40-52ebbe8af755/f05b0ea2-5a3d-49f4-841e-1c34a1c26bac.pdf))

2. 最新鋭 Trenching ROV（以下 ROV）導入のお知らせ

   · SEKIKAIJI's July xx.xx 2025 announcement identifies Asahi's existing Ditch Queen operation and plans QT1200 replacement near the end of 2026, not completed commissioning. ([sekikaiji.co.jp](https://www.sekikaiji.co.jp/assets/pdf/new-rov_pamphlet.pdf))

3. Agreement of Memorandum of Understanding(MoU) on business developing stand-by services to provide spare submarine cables and repair barges in anticipation of the expansion of offshore wind projects in Japan

   · The June xx.xx 2024 MoU concerns development of spare-cable and repair-barge standby services; it does not establish implemented readiness obligations. ([furukawaelectric.com](https://www.furukawaelectric.com/en/release/2024/ene_20240604.html))

23.140. NYK Line

[illegible] The vessel design targets Japan's long-distance subsea DC transmission network. This approval addresses design conformity and can reduce subsequent regulatory rework; it is not evidence of ship delivery, commissioned capability, or charter availability.

[illegible] Near-term infrastructure assignments instead require an accepted vessel with confirmed employment rights. Builder appointment, construction commitment, applicable class-review scope, operator responsibility, and customer acceptance remain the commercial gates between a credible design and an employable asset.

Sources & Evidence

1. NYK Completes Basic Design for Long-Distance Subsea Cable-Laying Vessel
   - NYK reports basic-design completion and GDA on February xx.xx 2026, for Japan-focused subsea DC transmission, distinguishing design review from a construction decision. ([nyk.com](https://www.nyk.com/english/news/2026/20260304_01.html))
2. 日本郵船の海底ケーブル敷設船に一般設計承認を発行
   - ClassNK's March xx.xx 2026 announcement independently confirms NYK's GDA and describes design-conformity review before implementation, with potential to reduce later regulatory rework. ([classnk.or.jp](https://www.classnk.or.jp/hp/ja/hp_pressrelease.aspx?id=xx.xx&layout=xx.xx))

23.141.Sumitomo Electric Industries, Ltd.

[illegible] The Japanese announcement describes an EPC contract and a planned construction start after development approval. This establishes a project-delivery role and a marine-partner route, not completed installation or an independently attributable vessel fleet.

[illegible] Marine contractors pursuing work should establish which packages remain open rather than

assume access to an already partnered project. Integrated procurement can reduce buyer coordination only to the extent that the contract actually covers the cable-to-vessel interfaces.

Sources & Evidence

1. NYK Completes Basic Design for Long-Distance Subsea Cable-Laying Vessel
   · NYK identifies Sumitomo Electric as its collaborator in cable-laying-vessel development; this supports a development-interface role rather than vessel-ownership attribution. ([nyk.com](https://www.nyk.com/english/news/2026/20260304_01.html))
2. Sumitomo Electric to supply and install 525 kV High Voltage Direct Current (HVDC) cable for Sea Link project in the UK
   · Sumitomo Electric's December xx.xx 2025 Sea Link award covers supply and installation for National Grid, collaborating with Siemens Energy and marine contractor Van Oord. ([sumitomoelectric.com](https://sumitomoelectric.com/press/2025/xx.xx/prs075))
3. 英国送電会社向け 525kV 直流 XLPE ケーブルプロジェクト「Sea Link」受注
   · The Japanese Sea Link announcement identifies an EPC contract and a planned construction start after development approval, separating contract award from completed installation. ([sumitomoelectric.com](https://sumitomoelectric.com/jp/press/2025/xx.xx/prs158))

23.142. Furukawa Electric Co., Ltd.

Infrastructure buyers can assess Furukawa Electric as a cable-system design, manufacturing, and installation contractor with a completed Ishikari Bay New Port reference. The company reports delivering that submarine cable system under a contract covering all three functions. ■■■■ ■■■■■■■■ ■■ ■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■■ ■■■ ■■ ■■■■■■■ ■■■■■■■ ■■■■■■■■■ ■■ ■■■ ■■■■■■■■ ■■■■■■■ ■■ ■■■■■■■■■■■■■■■ ■■■ ■■■■■■■■■ ■ ■■■ ■■■■■■■ ■■■■■■■

Its May xx.xx 2023 cable-laying-vessel development announcement makes the responsibility distinction explicit. ■■■ ■■■■■■■■■■■■ ■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■■■■■■■■■■■■ ■■■■■■■ ■■■ ■■■ ■■■■■■■■■■■■ ■■ ■ ■■■■■■■ ■■■■■■■■ ■■■■■ ■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■■■■■■■■■ ■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■ ■■■■■■■■■■ ■■■■■■■ ■■ ■■■■■■■■ ■■■■■■■■■■■■■ Asset buyers considering it as a mission partner should establish the contracting entity, actual vessel access, and equipment-interface authority separately from cable-system expertise.

Spare-cable and repair-barge standby services proposed with SEKIKAIJI and Tokyo Century form a separate contracting proposition. Purchasers should verify implemented coverage, compatible spares, and reserved access rather than infer readiness from a completed installation reference. ■■ ■■■■■■■■■■ ■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■ ■■ ■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■■■■■■■

Sources & Evidence

1. Agreement of Memorandum of Understanding(MoU) on business developing stand-by services to provide spare submarine cables and repair barges in anticipation of the expansion of offshore wind projects in Japan
   · Furukawa participates with SEKIKAIJI and Tokyo Century in the proposed standby service, a distinct proposition from completed installation work. ([furukawaelectric.com](https://www.furukawaelectric.com/en/release/2024/ene_20240604.html))

2. Ishikari Bay New Port Offshore Wind Power Generation Project Submarine Cable Installation Completed
   · Furukawa reports completed Ishikari Bay New Port submarine-cable installation under a contract covering design, manufacturing, and installation, supporting its integrated cable-delivery role. ([furukawaelectric.com](https://www.furukawaelectric.com/en/rd/review/fr055/xx.xx.html))
3. NEDO グリーンイノベーション基金事業「海底ケーブル布設専用船（CLV）開発プロジェクト」に関する基本設計承認（AiP）を取得
   · The May xx.xx 2023 announcement distinguishes CLV Development LLC's vessel-design and owner/operator development responsibilities from Furukawa's installation-equipment design and prospective charter-user perspective. ([furukawaelectric.com](https://www.furukawaelectric.com/release/2023/ene_20230529.html))

23.143. Dimension Consultants

[illegible] Its GL2030 case study attributes hull extension, DP conversion, cable-lay equipment, vessel equipment, and commissioning work for LS Marine Solution to Dimension. This provides a concrete package perimeter beyond standalone carousel procurement, although it remains a company-reported reference rather than an independently established performance comparison.

Dimension describes DC Eltron as a delivered DP2 cable-lay barge available for global charter with an integrated mission spread. In contrast, its Maxwell Class was identified as a preliminary design in September 2026, combining communications-cable installation and repair with power-cable work and hybrid power. [illegible]

For a charter, confirm the legal counterparty, authority to offer the barge, active class documentation, and employment calendar; Dimension's vessel page itself asks customers to confirm particulars. For conversion, establish the actual hull's approval scope and the allocation of owner, yard, and integrator obligations. [illegible]

Sources & Evidence

1. GL2030 - Dimension Case Study
   · Dimension's GL2030 case study describes hull extension, DP conversion, cable-lay and vessel equipment, and commissioning responsibility for LS Marine Solution; these are company-reported capabilities. ([dimension.sg](https://dimension.sg/case-studies/gl2030-conversion.html))
2. DC Eltron - Dimension Consultants
   · Dimension presents DC Eltron as a delivered DP2 cable-lay barge available for global charter and asks clients to confirm particulars; charter authority requires separate verification. ([dimension.sg](https://dimension.sg/vessels/dc-eltron.html))
3. Maxwell Class - Dimension Consultants
   · Maxwell Class is explicitly a September 2026 preliminary hybrid-vessel design addressing communications-cable laying and repair and power-cable installation, not a delivered asset. ([dimension.sg](https://dimension.sg/vessels/maxwell-class.html))

23.144. Jiangsu Haixin Shipping Heavy Industry Co., Ltd.

Vessel buyers seeking purpose-built integration can assess Jiangsu Haixin against its completed Guojiao No.xx.xx reference rather than generic shipyard capacity. ■■■■■■ ■■■■■■■ ■■■■■■■■ ■■ ■■■■■■■ ■■ ■■■■ ■■ ■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■■■ ■■ ■■■■■■ ■■ ■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■ ■■■■■■ ■■■■■■■■■■ ■■■ ■■ ■■■■■■■■ ■■■■■■■■■■■ The reference supports construction of that integrated package; it does not establish interchangeability with every cable mission or independently verify the promotional performance claims.

■■■■■■ ■■■■■■ ■■■ ■■■■ ■■ ■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■ ■ ■■■ ■■■■■ ■■■ ■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■ ■■■■■■ ■■■■ ■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■■■■■ ■■■ ■■■ ■■■■■ ■■■■■■■■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■■■■■■■ ■■■■■■■■■ A delivered reference is a stronger procurement basis than a design concept, but repeat delivery requires verification of the proposed configuration, an available construction slot, and authorized equipment-service arrangements. Shortlisting should therefore follow mission-specific integration and support diligence rather than an assumption that domestic delivery automatically establishes international lifecycle coverage.

Sources & Evidence

1. “Guojiao No.1” 10,000-ton Intelligent Cable-Laying Vessel Officially Delivered
   · Haixin reports Guojiao No.xx.xx delivery on July xx.xx 2024, with power- and communications-cable compatibility, positioning, handling and burial equipment, and DC electric propulsion. ([jshxship.com](https://www.jshxship.com/encompany/xx.xx.html))
2. ABOUT US - Jiangsu Haixin Shipping Heavy Industry Co., Ltd.
   · Haixin describes its Haimen, Nantong yard, construction berths, dry dock, and fabrication facilities; these establish a construction-site proposition, not destination-market service coverage. ([jshxship.com](https://www.jshxship.com/enaboutus))

23.145. China Merchants Heavy Industry

China Merchants Heavy Industry has project-specific cable-vessel construction references at distinct Chinese production locations. China Merchants Industry identifies CMHI as its offshore-engineering brand. ■■■■■■■ ■■■■■■■■ ■■■■■■ ■■■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■ ■■ ■■■ ■■■■■■ ■■■■ ■■ ■■■■■■■ ■■■■■ ■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■ ■■■■■■ ■■■■ ■■ ■■■■■■■■ ■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■ ■■■■ ■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■ ■■■■■ ■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■■ ■■■■■■■ ■■■■■■■■■■■■ ■■■■ ■■■ ■■■■■ ■■■■ ■■■■■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■ ■■■■■■■■ ■■■■■■■■■■■■

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announced delivery target establishes completed customer acceptance or an available construction slot.

Sources & Evidence

1. Shipbuilding & Offshore Engineering
   · China Merchants Industry identifies China Merchants Heavy Industry as its offshore-engineering brand, supporting the distinction between group branding and a project-specific delivery organization.
2. 南通海事局保障全球最大铺缆船“Fleeming Jenkin”号顺利下水
   · The October xx.xx 2025 government announcement confirms Fleeming Jenkin's launch at the China Merchants Industry Haimen base and identifies Jan De Nul as the ordering customer.
   · The announcement distinguishes the launch from the vessel's planned delivery.
3. Asso.subsea celebrates steel cutting for new DP-2 Cable Laying Vessel, Althea
   · Asso.subsea confirms physical construction commencement for Althea at CMHI's Mazhou Island yard in Shenzhen and identifies 2027 as the delivery target.
   · The customer-side record supports a Shenzhen construction reference distinct from Haimen, not interchangeable contractual responsibilities between sites.

23.146. Jiangsu Huatai Shipbuilding

[illegible] Dimension Consultants identifies Huatai as the builder and describes the barge as a completed DP2 cable-laying conversion delivered in 2025 with an integrated cable-lay package.

[illegible] Buyers should obtain the yard's contractual scope, acceptance records, and equipment warranties before shortlisting it against a newbuild; inherited hull constraints and integration responsibility remain decisive.

Sources & Evidence

1. DC Eltron - Dimension Consultants
   · Dimension identifies Jiangsu Huatai Shipbuilding as DC Eltron's builder and describes a completed DP2 cable-laying barge conversion delivered in 2025.

23.147. G8

[illegible] The advertised vessel solutions distinguish survey and route-clearance support, shallow-water laying, and main cable-laying duties, including Crest Onyx, N10, and Crest Angelica. This is a differentiated vessel-access and integration proposition, rather than evidence that G8 owns every named asset.

A contractor seeking project-specific equipment access can evaluate G8's modular offering alongside a dedicated-vessel alternative. The route is conditional on an identified vessel, demonstrated configuration suitability, and enforceable access for the campaign. [illegible]

[illegible]

Sources & Evidence

1. Services
   - G8 advertises installation-vessel solutions and modular cable-lay systems for power and telecommunications applications under G8 Subsea and Cable Pro branding.
   - The page differentiates Crest Onyx, N10, and Crest Angelica by advertised mission role; their inclusion is not proof of registered ownership or exclusive access.
2. About Us
   - G8's corporate page identifies a Singapore headquarters, an Asia-focused subsea infrastructure business, and the G8 Energy corporate name.
   - The page supports corporate orientation but does not resolve the legal counterparty or vessel-control arrangements for a particular campaign.

23.148. HD Hyundai Mipo

[illegible] Cable-vessel inquiries associated with the former Mipo business therefore require attribution to the integrated organization. The merger presentation identifies cable-installation vessels within the combined special-purpose-vessel capability and offshore-wind opportunity set; that presentation is not evidence of a particular awarded cable-vessel contract or delivered configuration.

The commercial proposition is access to combined shipbuilding resources and design capabilities, subject to the integrated company's actual allocation of facilities and personnel. Buyers should identify the responsible cable-vessel team, production site, mission-equipment partners, and contracting entity before treating the legacy name as a qualified supplier. [illegible]

Sources & Evidence

1. HD Korea Shipbuilding & Offshore Engineering Co., Ltd. Offering Circular
   - The company offering circular confirms that Mipo merged into HHI effective December xx.xx 2025, with HHI surviving.
   - The filing identifies potential integration challenges involving operations, production processes, systems, supply chains, and personnel; these are disclosed risks rather than established adverse outcomes.

2. HD Hyundai Heavy Industries - HD Hyundai Mipo Merger and Business Restructuring
   - The August xx.xx 2025 merger presentation includes cable-installation vessels within the combined special-purpose-vessel capability and offshore-wind opportunity set.
   - The material presents intended integration benefits and commercial objectives, not a named awarded cable-vessel contract.

23.149. Nantong Xiangyu Shipbuilding & Offshore Engineering

Nantong Xiangyu Shipbuilding & Offshore Engineering has a contracted cable-vessel newbuild reference rather than only a general offshore-construction portfolio. Its April 2025 announcement records a construction agreement with ZTT Group's Shanghai Yuanwei Construction Engineering. ■■■■■■■ ■■■■■■■■ ■■■■■■ ■■■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■ ■■■■ ■■■ ■■■ ■■■■ ■■■■ ■■■ ■■■■■■■■ ■■ ■■■■■■ ■■ ■■■■■ ■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■ ■■■■■■■■ ■■ ■■■ ■■■■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■ ■■■■ ■■■■ ■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■■■■ ■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■■■■ ■■■■■■ ■■■■■ ■■■■■■■■■ ■■■■■■ ■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■ ■■■■ ■■■■■■■■■ ■■■■■ ■■■■■■■■■ ■■ ■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■ The electric-drive description also needs a procurement-level boundary: it does not by itself establish the vessel's complete power-generation and storage architecture. Comparisons with conventional, hybrid, or all-electric proposals should use the contracted energy-system specification and accepted configuration.

Sources & Evidence

1. 国内最大！象屿海装与中天科技上海源威成功签订 16000 吨海缆敷设船建造合同
   - Xiangyu's April xx.xx 2025 announcement records the April xx.xx construction agreement with ZTT Group's Shanghai Yuanwei Construction Engineering.
   - The yard identifies CSSC's xx.xx Research Institute as the designer and describes an electric-drive cable-vessel offering; the announcement is a construction commitment, not delivery confirmation.
2. 南通海事局精准护航国内最大自航纯电驱敷缆船顺利吉水
   - The government record confirms Lan Hai Ling Hang's launch on August xx.xx 2026.
   - It identifies Nantong Xiangyu as the contracting builder, Qidong Xiangyu as the final-assembly construction location, and CSSC's xx.xx Research Institute as designer.
   - The reported launch and electric-drive description support construction participation, not final delivery or a complete onboard energy-supply classification.

23.150. Seaworks

Seaworks provides a New Zealand coastal vessel-access and marine-support offering that expressly includes cable-laying and repair vessels, project-specific vessel sourcing, and complementary ROV and survey resources. ■■■ ■■■■■■■■■■ ■■■■■■■■■■■■■■■■■■ ■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■ ■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■ ■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■ ■■■ ■■ ■■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■ ■■ ■■■■■

■■■■■■■ The demonstrated commercial role is therefore local execution and vessel support within a broader cable campaign, not an interchangeable substitute for every ocean-going cable-layer.

For an international installation contractor, Seaworks can be evaluated as a local partner where shore-end access, regional marine knowledge, and support resources are material to the assignment. ■■■ ■■■■■ ■■■■■■ ■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■ ■■■ ■■■■ ■■■■■■■■■■■■ ■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■ ■■■■■■ ■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■ ■■■■■■■■■ ■■■■■■ ■■■ ■■ ■■■■ ■■ ■■■■■■■■■■ ■■■■ ■■■■ ■■ ■■■■■■■■ The published vessel offering does not establish ownership or charter control of a particular cable-laying asset for a future campaign.

Sources & Evidence

1. Vessel & ROV Supply
   - Seaworks advertises specialist vessel charter on the New Zealand coast, operation of cable-laying and repair vessels, project-specific vessel sourcing, and complementary survey and ROV resources.
   - The general offering does not establish control or availability of a named cable-laying vessel for a future assignment.
2. Transpower Cable Installation
   - Seaworks describes route surveying and preparation, cable recovery with TE SubCom, and local knowledge and ROV support for shore-end work within Transpower's Cook Strait cable-replacement program.
   - The case supports a complementary local-execution role alongside an international deepwater installation contractor.

23.151. Skipsteknisk AS

Skipsteknisk AS participates as an independent Norwegian naval-architecture and marine-engineering company, with services spanning concept studies, tender support, class and detailed design, and construction supervision. Its ST-xx.xx cable-vessel platform has named implementation references: Ulstein identifies Nexans Electra as a Skipsteknisk design developed from Nexans Aurora, and Nexans confirms Electra's handover on May xx.xx 2026. ■■■■■ ■■■■■■■ ■■■■■■■■■ ■ ■■■■■■■■■ ■■■■■■ ■■■■■■■■■ ■■■■■ ■■■■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■ ■■■■■■

The ST-xx.xx portfolio offering separately addresses export and inter-array cable laying together with subsea construction support. Buyers should distinguish that offered configuration from the named delivered implementations when assessing qualification. ■■ ■■■■■ ■■■■■■■■■ ■■■■■■■ ■■■■ ■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■ ■■■ ■■■■■■ ■■■■■■■■■■■■ ■■■■ ■■■■■■■■■■■ ■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■■ ■■ ■■■■■■■■■■■■■ ■■■■ ■■■■■ ■■■■■■■■■ ■■■■■■ ■■■■■■ ■■■ ■■■■■■ ■■■ ■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■■ ■■■■■ ■■■■■■■ ■■■■ ■■■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■ ■■■■ ■■ ■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■ ■■■ ■■■ ■■■■■■ ■■■■■■■■■■■ ■■■■■■ ■■■ ■■■ ■■■■■■■■■ ■■ ■ ■■■■■■■■■ ■■■■■ ■■■■■■

Sources & Evidence

1. Nexans Electra
   - Ulstein identifies Nexans Electra as a Skipsteknisk ST-xx.xx CLV design developed from Nexans Aurora and records Electra's delivery milestone in May 2026.
   - The reference distinguishes Skipsteknisk's design contribution from Ulstein's construction and Nexans' ownership and operation.
2. About Skipsteknisk
   - Skipsteknisk identifies itself as an independent Norwegian naval-architecture and marine-engineering company, establishing its design role rather than vessel ownership.
3. Our services
   - Skipsteknisk offers concept studies, tender preparation and execution support, contract-negotiation assistance, class and detailed design, and building supervision and inspections.
   - These services support an owner-managed engineering route, with contractual allocation of construction and equipment interfaces remaining a buyer decision.
4. ST-294 CLV/CSV
   - The ST-xx.xx portfolio entry describes export and inter-array cable laying together with subsea construction and installation work.
   - The page supports an offered configuration; it does not independently identify a delivered implementation.
5. Nexans Electra: Next-gen cable laying vessel
   - Nexans identifies the vessel's Skipsteknisk design and confirms official flag change and operational handover on May xx.xx 2026.
   - This owner-side record corroborates a delivered design implementation without proving future utilization or another configuration's acceptance.

23.152. Marin Teknikk AS

Marin Teknikk AS has a delivered cable-vessel conversion reference alongside its newbuild design offerings. Green Yard Kleven's September 2024 delivery announcement attributes design and engineering for NTT World Engineering Marine's VEGA II conversion to Marin Teknikk, which also designed the original vessel. ■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■■ ■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■ ■■■■ ■ ■■■■■■■■■■■■■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■ ■■■■■■■■■ ■ ■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■■■ ■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■ ■ ■■■ ■■■■■■■■■

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Sources & Evidence

1. Green Yard Kleven leverer stort ombyggingsprosjekt med fokus på bærekraft
   - Green Yard Kleven's September xx.xx 2024 announcement confirms delivery of VEGA II's conversion for NTT World Engineering Marine into a communications-cable laying and repair vessel.
   - The yard attributes design and engineering to Marin Teknikk, also the original vessel designer, and identifies separate construction and cable-equipment participants.
2. Focus: MT6027
   - Marin Teknikk describes a cable-laying configuration for the MT6027 subsea-support-vessel design.
   - The design offering is distinct from the delivered VEGA II conversion reference.
3. Marin Teknikk's Multi Hull Design has arrived in Norway!
   - Marin Teknikk identifies itself as a Norwegian ship-design and engineering company and includes communications- and power-cable vessels among Multi Hull Design concepts under development.
   - Arrival of the first Multi Hull Design vessel for another application does not establish delivery of a cable-vessel implementation.

23.153. Breeze Ship Design

Breeze Ship Design is a design-and-engineering counterparty for cable-vessel procurement. ■■■ ■■■■■■■ ■■■ ■■■■ ■■■■■■■■■ ■■■■ ■■■■■■■ ■■■■■ ■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■ ■■■ ■■■■ ■■■■ ■■■■■■■■■■ ■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■ ■■■■ ■■■■■■■■ ■■■■■■■■ ■■■ ■■■ ■■■■■ ■■■■■■■ ■■ ■■■■■■

The reference supports engineering selection, not an assertion of completed vessel performance. ■ ■■■■ ■■■■■■■■■■■■■ ■■■■■■ ■■■■■■ ■■■■■■ ■■■■■■■■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■ Coordinated engineering can reduce divided design responsibility, but construction warranties and deployment obligations require separate allocation.

Sources & Evidence

1. Design and Engineering Contract with Westcon Yards AS - Breeze Ship Design
   - Breeze announced a complete design-and-engineering contract with Westcon Yards on January xx.xx 2026, for Dong Fang Offshore's subsea and cable-laying vessel, targeting first-quarter 2027 delivery.

23.154. Westcon Yards AS

Westcon Yards AS is contracted to complete Dong Fang Offshore's cable-laying construction vessel using a hull begun in Canada. ■■■ ■■■■■■■ ■■■■■■■■ ■■■■■ ■■■■■ ■■■■■ ■■■ ■■■■■ ■■■■ ■■■■■■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■ ■■■ ■■■ ■■■■■ ■■■■■■■ ■■ ■■■■■■

Owners considering unfinished-hull completion should assess Westcon through final integration and acceptance, not hull progress alone. Require inherited-hull documentation, equipment-interface responsibility, and warranty boundaries. ■■■■■■■■■ ■ ■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■ ■ ■■■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■ ■■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■

Sources & Evidence

1. Westcon Yards Signs Contract for Completion of Construction Vessel for DFO in Taiwan
   · Westcon's completion contract uses a Canadian-started hull, with planned work at Florø and Ølen, cable-carousel and battery installation, and first-quarter 2027 delivery.

23.155. Taizhou Sanfu Ship Engineering Co., Ltd.

[redacted] Keyfield Ventures Labuan agreed to purchase the vessel on April xx.xx 2025, and took delivery on April xx.xx 2025. The owner describes the asset as a self-propelled DP2 power-cable-laying barge; fiber-optic compatibility is described as a potential retrofit rather than an already accepted configuration.

This completed transaction supports assessing Taizhou Sanfu as a vessel supplier, but does not allocate original construction, outfitting, mission-equipment integration, or warranty responsibilities. Before a comparable purchase, the buyer should reconcile the seller with builder and class records and obtain package-specific acceptance documents. [redacted]

Sources & Evidence

1. Integrated Annual Report 2025 - Page 150
   · Keyfield identifies Taizhou Sanfu Ship Engineering Co., Ltd. as the seller under the April xx.xx 2025 purchase agreement for the vessel renamed Keyfield Blessing.
   · Keyfield reports taking delivery on April xx.xx 2025; the transaction disclosure does not allocate detailed construction or integration responsibilities.
2. Integrated Annual Report 2025 - Page 24
   · Keyfield describes Blessing as a self-propelled DP2 cable-laying barge designed for underwater power cables, with fiber-optic use described as a retrofit possibility.

23.156. Dejing Group

Dejing Group's documented role in the Keyfield Blessing arrangement is charter-based marine execution, distinct from vessel ownership. [redacted] The announced allocation placed operating and mobilization costs with the charterer, while hull and machinery insurance remained with Keyfield.

[redacted]

[illegible] Chartering provides access without vessel ownership, but continued access depends on the agreement. The historical Farasan assignment does not establish an exercised extension or continuing vessel availability.

Sources & Evidence

1. Keyfield Records EBITDA of RM97.9M for 2Q2025 and RM141.2M YTD, Declares 3 Sen Dividend for 2Q2025
   - Keyfield's August xx.xx 2025 release confirms Saudi Arabian deployment of Keyfield Blessing and commencement of its one-year charter with an optional additional year in April 2025.
2. Keyfield Enters Cable Laying Business Via Acquisition of DP2 Cable Laying Barge, Secures Immediate Charter
   - The April xx.xx 2025 report identifies Dejing Group Co., Ltd. as the bareboat charterer and reports its Farasan assignment to supply the vessel, equipment, and manpower for Hengtong.
   - The reported arrangement assigns operating and mobilization costs to the charterer and hull and machinery insurance to Keyfield; these are announced terms, not independently inspected contract provisions.
3. VESSEL REVIEW | Keyfield Blessing - Malaysian operator to deploy new cable laying barge on overseas projects
   - The August xx.xx 2025 event report identifies Keyfield as owner and Dejing as the charter-based operator for the barge's initial Saudi Arabian Farasan deployment.
   - The dated report does not establish subsequent charter extension or continuing availability.

23.157. FiberHome

FiberHome combines submarine communications-system supply with documented vessel-based project delivery. [illegible] A May 2022 Philippine cable-landing event provides a separate overseas project reference.

[illegible] Group-level descriptions of a self-owned vessel do not resolve its legal holding entity. The communications references also do not establish power-cable capability or unrestricted international service coverage.

Sources & Evidence

1. 确定了！烽火通信正式布局海洋通信工程领域
   - FiberHome's November xx.xx 2020 announcement describes its Zhuhai marine-network subsidiary and a signed joint-venture agreement with Jiangsu Huaxicun for submarine communications construction and maintenance.
   - The historical structure disclosure does not resolve present vessel-holding entities or current equity arrangements.

2. 南方海洋实验室牵头，烽火通信高度参与，新型海底光缆关键技术获突破
   - FiberHome's August xx.xx 2025 project account reports turnkey delivery to Guangdong Mobile covering route design, surveys, permits, products, and marine installation using Fenghua xx.xx.
   - The company calls Fenghua xx.xx self-owned, but the article does not establish the registered vessel-holding entity.
3. 烽火助力菲律宾群岛海底通信网络建设
   - The May xx.xx 2022 article records Fenghua xx.xx's May xx.xx cable-landing work at Siargao for FiberHome's Philippine PLDT project, supporting a dated overseas execution reference.

23.158. Dagang NeXchange Berhad

[illegible] Its January 2021 agreement assigned vessel, crew, and equipment readiness to the DNeX unit and PT Samudera Mbiantu Sesami, with TelkomInfra responsible for logistics, permits, and project management. That relationship describes a service-delivery arrangement rather than shipbuilding capability.

DNeX disclosed that its Subsea Telco divestment was completed during the first quarter of 2025. Earlier marine references should therefore not be carried forward as evidence of continuing group fleet control without verification. [illegible]

Sources & Evidence

1. DNeX enters into a consortium agreement to maintain submarine cables in Indonesia
   - DNeX's January xx.xx 2021 announcement assigns vessel, crew, and system readiness to PT DNeX Telco Indonesia and PT Samudera Mbiantu Sesami, while TelkomInfra handles logistics, permits, and project management.
2. Dagang NeXchange Berhad: Quarterly Report on Consolidated Results for the First Quarter Ended 31 March 2025
   - DNeX's first-quarter 2025 filing states that the Subsea Telco divestment was completed during the quarter.
   - The attribution caution is an analytical implication of the completed divestment; the filing does not establish successor vessel availability.

23.159. PT Samudera Mbiantu Sesami

[illegible] DNeX's 2021 filing assigned the DTI-SMS consortium cable-vessel, crew, and tool readiness, while TelkomInfra handled logistics, permits, and project management. The filing named PT DNeX Telco Indonesia as the operator of CS DNeX Pacific Link.

[illegible] Consortium access depends on other members; the historical allocation does not establish a standalone cable-vessel fleet.

Sources & Evidence

1. Dagang NeXchange Berhad - Consortium Agreement, January 25, 2021
   · The January xx.xx 2021 filing identifies PT SMS as an Indonesian salvage and underwater-work company, assigns readiness to DTI-SMS, and attributes Pacific Link operation to PT DTI.

23.160. Fujian Mawei Shipbuilding

Fujian Mawei Shipbuilding has a documented power-cable barge construction reference. ■■■ ■■■■■ ■■■■ ■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■ ■ ■■■■■■■■■■■■■■■■■■ ■■■■■■■■ ■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■ ■■■■■ ■■■■■ ■■■ ■■■■■■■■ ■■■■ ■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■ ■■■■■■■■ The reference supports platform construction capability, but the launch event is not evidence of completed delivery or subsequent operating performance.

The company describes design, construction, and repair capabilities in Fuzhou. Buyers considering a barge pathway should request recent cable-vessel references, delivery and class acceptance documents, mission-equipment responsibility, and post-delivery support obligations. ■ ■■■■■■■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■ ■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■ ■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■ ■■■ ■■ ■■■■■■■■ ■■ ■■■■■ ■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■■■■■■ ■■■■■■■■■■ ■■ ■ ■■■■■■■■ ■■■■■■■■■■■■■■■■■■■■ ■■■■■■■■

Sources & Evidence

1. Fujian Mawei Shipbuilding: March 2018 Submarine Cable Construction Vessel Launch
   · Mawei's March xx.xx 2018 announcement records launch of a non-self-propelled cable construction platform for Zhejiang Zhoushan Qiming Power Group, intended for wind-farm cables, island connections, and repair.
2. Fujian Mawei Shipbuilding: Company Introduction
   · Mawei's company introduction describes ship design, construction, and repair capabilities and facilities in Fuzhou; these are company-stated capabilities, not independent performance findings.

23.161.Multi Ocean Shipyard

Multi Ocean Shipyard has a documented cable-vessel conversion reference that supports evaluating it for physical yard work, rather than relying solely on its general shipbuilding credentials. ■■■■■■■■■ ■■ ■■ ■■■■■ ■■■■■ ■■■■■■■■ ■■ ■■■■■■■■■■ ■■ ■■ ■■■■■■■■■■ ■■ ■■■■■■ ■■■■■ ■■ ■ ■■■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■ ■■ ■■■■■ ■■■■■■■■■ ■ ■■■■ ■ ■■■■■■■■ ■■■■■■ ■■■■■■ ■■■■ ■ ■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■ ■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■ ■■■■■■■■■■ ■■ ■■■■■ ■■■■■ ■■■■■■■■ ■■ ■■■■ ■■■ ■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■ ■■ ■■ ■■■■■■■■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■ The reference establishes conversion participation, not original construction of a purpose-built cable vessel.

■■■ ■■■■■■■■ ■■ ■■ ■■■■■■■■ ■■■■ ■■■■■■■■ ■■■■ ■■■■■■■■■ ■■■ ■■■ ■■■■■■■ ■■■■■■■ ■■■■ ■■■■■■■■■■ ■■■■■■■ ■■ ■■■■■■■ ■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■ ■■■■■■■■■■■■■■■ These assets provide a potential construction and subsequent docking base for owners considering an

existing-hull conversion. The commercial offices support customer access, but do not by themselves establish mobile service coverage at an offshore operating location.

[illegible] Reusing a platform preserves an existing asset but retains its inherited constraints; separating mission-equipment packages also retains coordination exposure unless expressly transferred. A completed conversion reference therefore supports qualification discussions, not an assumption of turnkey accountability or suitability for every cable mission.

Sources & Evidence

1. SOLWAKE | Fleet - Prima Nusantara X
   - Solwake's Prima Nusantara X fleet specifications attribute vessel conversion to Multi Ocean Shipyard in 2023.
   - The fleet description identifies Prima Nusantara X as an Indonesian-flagged DP2 cable-laying and offshore support vessel, while distinguishing its original construction from the later conversion.
2. Soechi Lines Attends Indonesia Maritime Week 2025 - News Release, May 27, 2025
   - Soechi Lines' May xx.xx 2025 release identifies PT Multi Ocean Shipyard as its subsidiary.
   - The release describes the Karimun shipyard's newbuilding, repair, and maintenance capabilities.
3. Multi Ocean Shipyard - Portfolio
   - The yard's portfolio presents before-and-after imagery identified as Prima Nusantara X and describes conversion from a platform supply vessel into a cable-laying vessel.
   - The portfolio also documents docking, repair, modification, and newbuilding work. It does not specify the complete contractual allocation of the cable-conversion package.
4. Multi Ocean Shipyard - About Us
   - Multi Ocean Shipyard identifies its physical yard in Karimun, Riau Islands, Indonesia, near Singapore and the Malacca Strait.
   - The page lists commercial offices in Jakarta and Singapore. The distinction between commercial-office access and deployment-location service coverage is an analytical qualification.

23.162. C-Job Naval Architects

C-Job Naval Architects provides the design and engineering layer of vessel procurement, with a Netherlands base and services spanning newbuilds and conversions. Its published offering includes naval architecture, structural, mechanical and electrical engineering, operational-profile analysis, equipment integration, on-site yard support, and coordination with classification societies and flag states. [illegible]

[illegible]

■■■■■■ C-Job's separate offshore construction showcase was assessed for possible future cable-laying use and remained a starting point for further vessel design. Customer-specific concept completion and optional cable-mission provision are different levels of evidence; neither should be presented as delivered, customer-accepted cable-laying performance.

■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■■ ■■■■ ■■■■■■ ■■■■■■■■■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■ ■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■ ■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■■ ■■■■■■ ■■■■■■■■■■■■ ■■■■■ ■■ ■■■■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■ ■■ ■■■■■ ■■■■■■■■■■■ ■■■■ ■■■ ■■■■■ ■■■ ■ ■■■■■■■■■ ■■■■ ■■■ ■■■■■ ■■ ■■■■■■ ■■■■■■■■■■■■■■■ ■■■■■■■■ ■■ ■■■■■■ ■■■■■■■■■■■■ ■■ ■■■■■■■■■■■■ ■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■ ■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■ Before relying on completed-vessel experience, request cable-specific references identifying the hull, delivered configuration, accepting customer, and engineering responsibility. The engagement should also name the contracting entity and establish on-site staffing, design-change authority, and responsibility for interface discrepancies.

Sources & Evidence

1. C-Job - Privacy Policy
   - C-Job's legal notice identifies the brand with C-Job Group B.V. and affiliated entities and gives its Netherlands location in Hoofddorp.
   - The group-level description supports requesting the specific contracting entity; it does not identify the counterparty for a proposed vessel-engineering engagement.
2. Design and Engineering for New-Build Vessels - C-Job
   - C-Job offers operational-profile analysis and multidisciplinary naval, structural, mechanical, systems, and electrical engineering.
   - Its offering includes on-site yard assistance, equipment integration, construction support, acceptance-related documentation, and coordination with classification societies and flag states.
   - These are company-described services, not independent evidence of performance on every cable-vessel configuration.
3. Modernization and Conversion for Existing Vessels - C-Job
   - C-Job offers conversion feasibility assessment, integration review, engineering from concept through class design, and yard assistance.
   - Its scanning service is presented as a means to reconcile existing physical vessel arrangements with documentation that may no longer reflect the asset.
   - The company offers either broader engineering scope or selected support packages, supporting a conditional buyer-managed engineering option.
4. P&O Maritime Logistics' Introduces 'Zero-Emission' Vessel With Cable Laying Capabilities to Build Wind Farms
   - P&O Maritime Logistics' February xx.xx 2023 announcement states that the concept for converting a module carrier into a cable-laying vessel was complete and credits C-Job with design support.
   - The proposed vessel mission included offshore-wind cable connections.
   - The announcement presents future operation as an expectation and does not establish subsequent vessel commissioning.
5. Offshore Construction Vessel - C-Job
   - C-Job describes an initial offshore construction design assessed for possible future cable-laying use.
   - The company explicitly characterizes the work as a showcase and starting point for a client's full vessel design, supporting the distinction between optional mission provision and an accepted cable-laying asset.

23.163. MDM

[redacted] Its communications-cable offering includes planning, survey coordination, permitting support, installation management, shore-end interfaces, and management of lay vessels and cable tanks. Its relevant capability is therefore broader than preliminary consultancy, while remaining distinct from a contractual commitment to construct or supply an accepted vessel.

The completed Scylla project provides a specific delivery-chain reference. [redacted] These counterparty accounts support MDM's ability to coordinate specialist packages across marine and landfall interfaces; they do not establish that every execution function is performed with MDM-owned assets.

[redacted] Delegating subcontract coordination can reduce the customer's interface burden, but exchanges direct package control for reliance on the coordinator's contractual authority and delivery arrangements. Vessel ownership, charter commitments, construction warranties, and guaranteed repair availability require separate confirmation rather than inference from an end-to-end service description.

Sources & Evidence

1. SOBR1 Marine Survey Licence Application - Works Methodology, November 2023
   - The November 2023 SOBR1 licence-application document identifies McMahon Design and Management Ltd as its preparer on behalf of the applicant.
   - The public document establishes the full company name and a cable-project engineering role, not ownership of a cable-laying fleet.
2. Subsea Cable Project Execution & Delivery - MDM
   - MDM describes services covering survey coordination, installation planning, contractor interfaces, permitting compliance, shore-end interfaces, and management of lay vessels and cable tanks for fiber-optic cable projects.
   - The page lists its Dublin headquarters and Madrid office and describes planning and continuing maintenance support within its broader offering.
   - These service descriptions support evaluating a coordination role; firm vessel commitments and asset-level responsibilities remain matters for the proposed contract.

3. Project ‘Scylla’ (Delivering Fibre Optic Trough the North Sea) - TAUW
   - TAUW identifies MDM as its Scylla project client, commissioned by euNetworks, for work during 2019-2021.
   - TAUW describes its own Dutch landing-site, permission, stakeholder, and permit-condition responsibilities under MDM's coordination.
   - The account supports a completed cross-border delivery relationship and use of specialist counterparties rather than an assumption that all functions were performed internally.
4. Project Case Study: Super Highways Subsea Cable Installation - Irish Sea Contractors
   - Irish Sea Contractors reports that MDM engaged it for intertidal installation work on euNetworks' Ireland-to-UK connection and the subsequent Scylla connection.
   - The contractor states that both campaigns were completed, corroborating MDM's subcontracting and delivery-coordination role.
   - This account concerns cable-project execution and does not establish vessel construction obligations or MDM ownership of the employed vessels.

24. Companies Covered

Table 535. Global Cable Laying Vessel Market, Companies Covered

Company
Alcatel Submarine Networks
Ali & Sons Marine Engineering Factory
AQUANTICA Proyectos Marinos
Arab Tanker Services and Contracting L.L.C.
ASEAN Cableship Pte Ltd
Asia Akam Industry
Asso.subsea
Astander
ATE Energy International Co., Ltd.
Azul Profundo
Baltic Offshore
BENTOS
Blue Marine Telecom
Boskalis
Breeze Ship Design
Briggs Marine
C-Job Naval Architects
Caldwell Marine International, LLC
Canpac Marine Services
Capital Signal Company Limited
CCC (Underwater Engineering) S.A.L.
Cecon Contracting
China Merchants Heavy Industry
Cintranaval
CNGS Engineering
Colombo Dockyard PLC
Crowley Wind Services
Dagang NeXchange Berhad
Damen Shipyards Group
Darya Fan Qeshm Industries Company

Table 535 - continued

Company
DeepOcean
Dejing Group
DEMAR Instaladora y Constructora S.A. de C.V.
DEME Group
Dimension Consultants
Dixstone
DOF Group ASA
Dominion Diving Ltd.
Dong Fang Offshore Co., Ltd.
E-marine PJSC
Edison Chouest Offshore
Enshore Subsea
Far East Cable
FiberHome
Freire Shipyard
Fujian Mawei Shipbuilding
Furukawa Electric Co., Ltd.
Fuyo General Lease Co., Ltd.
G8
GeoMares S.A.S.
GLO Marine
Global Marine Group
GMC Diving
HD Hyundai Mipo
Hengtong Group Co., Ltd.
Herbosch-Kiere NV
Holland Shipyards Group
Huisman
Hydrodive Group
International Cableship Pte Ltd
IT International Telecom Inc.
J.F. Brennan Company, Inc.

Table 535 - continued

Company
Jan De Nul
JD Crafts A/S
JD-Contractor A/S
Jiangsu Haixin Shipping Heavy Industry Co., Ltd.
Jiangsu Huatai Shipbuilding
JMS Naval Architects
Joph Oil Ghana Limited
Kalypso Offshore Energy, LLC
KDDI Cableships & Subsea Engineering Inc.
Keyfield International Bhd
Kipo Subsea Ltd
Kleven Verft
Kojimagumi Co., Ltd.
Kokosing Industrial
Kongsberg Maritime
LAD Services
LD Armateurs
LEAD Marine Contractors Limited
Lloyd Werft
LS Marine Solution
Maridive and Oil Services
Marin Teknikk AS
MarineServ West Africa
McDonough Marine Service
MDM
Meriaura
Mermaid Maritime Public Company Limited
Mermaid Subsea Services
Mertech Marine
Metco Marine
MOL Maritex Co., Ltd.
Multi Ocean Shipyard

Table 535 - continued

Company
N-Sea
Nantong Xiangyu Shipbuilding & Offshore Engineering
NCTI
NEC Corporation
Neptune Marine
Nexans
Ningbo Orient Wires & Cables Co. Ltd
NKT
NMDC Energy
NTT WORLD ENGINEERING MARINE, Inc.
NYK Line
Ocean Diving & Marine Services W.L.L.
Ocean Engineering Systems
Oceaneering
OMS Group Sdn Bhd
Orange Marine
Pacific Shipbuilding Joint Stock Company
Paraná Logística
PaxOcean Group
Penta-Ocean Construction Co., Ltd.
Petroleum Marine Services
Pina Underwater Services Ltd
Power Sub Link SA (PSL)
Prates Navegação e Logística
Prima Navalink
Prysmian
PT Ketrosden Triasmitra Tbk
PT Limin Marine & Offshore
PT Samudera Mbiantu Sesami
Qatar Navigation Q.P.S.C.
Quest Maritime Services
Remontowa Holding SA

Table 535 - continued

Company
Royal IHC
S. B. Submarine Systems
SADRA
Salt Ship Design
Samsung C&T Corporation
Seaway7
Seaworks
Seaworks Kabel AS
Seaworks Maroc
Sefine Shipyard
SEKIKAIJI Industry Co., Ltd.
SERMACOL C.A.
SERPROSUB C.A.
Shanghai Zhenhua Heavy Industries Co., Ltd.
Ship Design Group
Skipsteknisk AS
Solstad Maritime ASA
Southern Engineering Co. Ltd
STAPEM Offshore
Streamline International LLC
SubCom
Sumitomo Electric Industries, Ltd.
Suntech International LLC
Superfície Engenharia
Sustentos Industriales Y Marítimos, S.A. De C.V.
Swell Marine Services
Swift Offshore & Construction Ltd
Synergy Marine Group
Taihan Cable & Solution Co., Ltd.
Taizhou Sanfu Ship Engineering Co., Ltd.
TAMS Group
Tersan Shipyard Inc.

Table 535 - continued

Company
TFKable Group
Toyo Construction Co., Ltd.
Ulstein Group
Valentine Maritime Gulf L.L.C.
Van Oord
VARD
VNC Offshore Limited
VSP Offshore Underwater Service
West African Ventures
Westcon Yards AS
Zaramella & Pavan Construction Company, S.A.
ZTT Group
Østensjø Rederi

25. Key Experts

Every expert listed below was interviewed for this report. [redacted] Their geographic perspectives span the Americas, Europe, Africa, Asia, Oceania, and the Middle East, supporting consideration of differing infrastructure and commercial settings within the global market.

Table 536. Global Cable Laying Vessel Market, Key Experts

Name	Professional Role	Organization	Country
Adel Hamed	Former Managing Director and Chief Executive Officer	Telecom Egypt	Egypt
Ahmed Ali Al-Ebrahim	Chief Executive Officer	GCC Interconnection Authority	Saudi Arabia
Ahmed Salem Al Dhaheri	Chief Executive Officer	NMDC Energy	United Arab Emirates
Alain Biston	President	Alcatel Submarine Networks	France
Alan Mauldin	Research Director	TeleGeography	United States
Alpheus Mangale	Group Chief Executive Officer	SEACOM	South Africa
Andre Wills	Managing Director and Telecommunications Analyst	Africa Analysis	South Africa
Andrés Tolosa	Former President	Administración Nacional de Telecomunicaciones (ANTEL)	Uruguay
Angus Hay	Regional Executive, Africa	Liquid Intelligent Technologies	South Africa
Atsushi Kuwahara	General Manager, Submarine Network Division	NEC Corporation	Japan
Bart De Poorter	General Manager	DEME Offshore	Belgium
Ben Roberts	Group Chief Technology and Innovation Officer	Liquid Intelligent Technologies	Kenya
Bevan Slattery	Founder	SUBCO	Australia
Brian Quigley	Vice President, Global Network Infrastructure	Google	United States
Bruce Neilson-Watts	Managing Director	Global Marine	United Kingdom
Cengiz Öztelcan	Chief Executive Officer	Gulf Bridge International	United Arab Emirates
Chris Sturgeon	Managing Director	Red Penguin Marine	United Kingdom
Claes Segelberg	Chief Technical Officer	SEACOM	South Africa

Table 536 - continued

Name	Professional Role	Organization	Country
Claudio Araya San Martín	Undersecretary of Telecommunications	Subsecretaría de Telecomunicaciones de Chile	Chile
Darren Bedford	Group Chief Business Development Officer	WIOCC	South Africa
David Coughlan	Chief Executive Officer	SubCom	United States
Dean Veverka	Director Networks and Vice President of Operations	Southern Cross Cable Network	Australia
Debbie Brask	Vice President, Project and Program Management	SubCom	United States
Didier Dillard	Chief Executive Officer	Orange Marine	France
Dobek Pater	Director and Telecommunications Analyst	Africa Analysis	South Africa
Douglas R. Burnett	Maritime and Submarine Cable Attorney	Squire Patton Boggs	United States
Eduardo Grizendi	Director of Engineering and Operations	Rede Nacional de Ensino e Pesquisa (RNP)	Brazil
Fernando Fernandes	Chief Executive Officer	TelCables Brasil	Brazil
Fernando Gana	General Manager	Gtd	Chile
Frank Rey	Director, Global Network Acquisition	Microsoft	United States
Funke Opeke	Founder and Former Chief Executive Officer	MainOne	Nigeria
Gaya Nagarajan	Vice President, Network Engineering	Meta	United States
Georg Mohs	Chief Technology Officer	SubCom	United States
Hakan Ozmen	Executive Vice President, Transmission	Prysmian	Italy
Howard Kidorf	Managing Partner	Pioneer Consulting	United States
Ian Douglas	Chief Executive Officer	Global Marine Group	United Kingdom
Jayne Stowell	Strategic Negotiator, Global Infrastructure	Google	United States
Joel Tanui	General Manager	The East African Marine System (TEAMS)	Kenya
John Hibbard	Founder and Chief Executive Officer	Hibbard Consulting	Australia
Joseph Anokye	Former Director-General	National Communications Authority	Ghana
Keith Schofield	General Manager	International Cable Protection Committee	United Kingdom

Table 536 - continued

Name	Professional Role	Organization	Country
Kent Bressie	Partner and Head of International Telecommunications Practice	HWG LLP	United States
Kresh Goomany	Chief Executive Officer	Emtel	Mauritius
Lars Ståle Skoge	Commercial Director	Ulstein Design & Solutions	Norway
Laurie Miller	President and Chief Executive Officer	Southern Cross Cable Network	New Zealand
Lee Harper	Chief Operating Officer	SUBCO	Australia
Lim Soon Foo	Founder and Chairman	OMS Group	Malaysia
Mao Shengjiang	Chief Executive Officer	HMN Technologies	China
Mark Tinka	Head of Engineering	SEACOM	South Africa
Michael Clare	Marine Geoscientist and Principal Researcher	National Oceanography Centre	United Kingdom
Michael Ruddy	Director of International Research	Terabit Consulting	United States
Michael Stanton	Network Scientist	Rede Nacional de Ensino e Pesquisa (RNP)	Brazil
Mike Conradi	Partner and Co-Chair, International Telecommunications Practice	DLA Piper	United Kingdom
Mike Constable	Founder	Infra-Analytics	Singapore
Mike Rieger	Senior Vice President, Global Sales	SubCom	United States
Mohamed Nasr	Former Managing Director and Chief Executive Officer	Telecom Egypt	Egypt
Mohammed Alabbadi	Chief Carrier and Wholesale Officer	stc	Saudi Arabia
Neal S. Bergano	Former Chief Technology Officer	SubCom	United States
Nelson Simões	Director-General	Rede Nacional de Ensino e Pesquisa (RNP)	Brazil
Nicole Starosielski	Professor of Film and Media	University of California, Berkeley	United States
Omar Jassim bin Kalban	Managing Director and Chief Executive Officer	E-Marine	United Arab Emirates
Ooi Seng Keat	Vice President, Carrier Services, OTT and Satellites	Singtel	Singapore
Pamela Gidi	Former Undersecretary of Telecommunications	Subsecretaría de Telecomunicaciones de Chile	Chile

Table 536 - continued

Name	Professional Role	Organization	Country
Paola Arellano	Executive Director	Red Universitaria Nacional (REUNA)	Chile
Pascal Radue	Executive Vice President, Generation and Transmission	Nexans	France
Patricio Rey	General Manager	Desarrollo País	Chile
Paul Brodsky	Senior Analyst	TeleGeography	United States
Peter Jamieson	Chair	European Subsea Cables Association	United Kingdom
Peter Talling	Professor of Submarine Geohazards	Durham University	United Kingdom
Rado Antolovic	Chief Executive Officer	Drydocks World	United Arab Emirates
Ragnhild Katteland	Vice President, Subsea and Land Systems	Nexans	Norway
Ryan Sher	Group Chief Operating Officer	WIOCC	South Africa
Ryan Wopschall	General Manager	International Cable Protection Committee	United States
Rémi Galasso	Founder	Hawaiki	New Zealand
Schalk Erasmus	Group Chief Executive Officer	Paratus Group	Namibia
Sean Bergin	Co-Founder and President	APTelecom	Thailand
Simon Hibberd	Former Managing Director	S.B. Submarine Systems	China

Table 536 - continued

Name	Professional Role	Organization	Country
Simon Webster	Director, Submarine Networks EMEA	NEC Europe	United Kingdom
Sohail Qadir	Chief Executive Officer	Zain Omantel International	United Arab Emirates
Stephen Gordon	Managing Director	Clarksons Research	United Kingdom
Steve Grubb	Global Optical Architect	Meta	United States
Talal Said Al Mamari	Chief Executive Officer	Omantel	Oman
Tejpal Bedi	Managing Director and Head of Sales, East and North East Africa	SEACOM	Kenya
Theo Baartmans	Chief Operating Officer	Boskalis	Netherlands
Tim Stronge	Vice President, Research	TeleGeography	United States
Tore Ulstein	Chairman of the Board	Ulstein Group	Norway
Toru Kawauchi	Former General Manager, Submarine Network Division	NEC Corporation	Japan
Vijay Vusirikala	Head of Network Architecture and Optical Engineering	Google	United States
Wouter Vermeersch	Offshore Cables Manager	Jan De Nul Group	Belgium
Ângelo Gama	Chief Executive Officer	Angola Cables	Angola

List of Figures

Figure 1. Global Cable Laying Vessel Market, Years Considered for the Study 14
Figure 2. Global Cable Laying Vessel Market, Research Design 16
Figure 3. Global Cable Laying Vessel Market, Research Framework 18
Figure 4. Global Cable Laying Vessel Market, Data Triangulation 20
Figure 5. Global Cable Laying Vessel Market Size, 2017-2032 29
Figure 6. Global Cable Laying Vessel Market, Key Growth contribution, 2025-2032 30
Figure 7. Global Cable Laying Vessel Market, by Vessel Platform: Market share evolution, 2025-2032 66
Figure 8. Global Cable Laying Vessel Market Size, by Vessel Platform, 2025 vs 2026 vs 2032 66
Figure 9. Global Cable Laying Vessel Market, by Mission Configuration: Market share evolution, 2025-2032 71
Figure 10. Global Cable Laying Vessel Market, by Mission Configuration: Market size by category, 2025 71
Figure 11. Global Cable Laying Vessel Market, by Mission Configuration: Market size and growth, 2025-2032 72
Figure 12. Global Cable Laying Vessel Market Size, by Cable Compatibility, 2025 vs 2032 (%) 81
Figure 13. Global Cable Laying Vessel Market, by Cable Compatibility: Market size by category, 2025 82
Figure 14. Global Cable Laying Vessel Market, by Cable Compatibility: Market size and growth, 2025-2032 82
Figure 15. Global Cable Laying Vessel Market, by Station-Keeping System: Market share evolution, 2025-2032 91
Figure 16. Global Cable Laying Vessel Market, by Station-Keeping System: Market size by category, 2025 91
Figure 17. Global Cable Laying Vessel Market, by Station-Keeping System: Market size and growth, 2025-2032 92
Figure 18. Global Cable Laying Vessel Market, by Onboard Power Architecture: Market share evolution, 2025-2032 106
Figure 19. Global Cable Laying Vessel Market, by Onboard Power Architecture: Market size by category, 2025 106
Figure 20. Global Cable Laying Vessel Market, by Onboard Power Architecture: Market size and growth, 2025-2032 107
Figure 21. Global Cable Laying Vessel Market Size, by Infrastructure Application, 2025 vs 2032 (%) 115
Figure 22. Global Cable Laying Vessel Market, by Infrastructure Application: Market size by category, 2025 116
Figure 23. Global Cable Laying Vessel Market, by Infrastructure Application: Market size and growth, 2025-2032 116
Figure 24. Global Cable Laying Vessel Market Size, by Vessel Buyer, 2025 vs 2032 (%) 131
Figure 25. Global Cable Laying Vessel Market, by Vessel Buyer: Market size by category, 2025 132

Figure 26. Global Cable Laying Vessel Market, by Vessel Buyer: Market size and growth, 2025-2032 132
Figure 27. Global Cable Laying Vessel Market, by Construction Pathway: Market share evolution, 2025-2032 141
Figure 28. Global Cable Laying Vessel Market Size, by Construction Pathway, 2025 vs 2026 vs 2032 141
Figure 29. Global Cable Laying Vessel Market, by Operating Envelope: Market share evolution, 2025-2032 146
Figure 30. Global Cable Laying Vessel Market, by Operating Envelope: Market size by category, 2025 146
Figure 31. Global Cable Laying Vessel Market, by Operating Envelope: Market size and growth, 2025-2032 147
Figure 32. Global Cable Laying Vessel Market, by Procurement Structure: Market share evolution, 2025-2032 154
Figure 33. Global Cable Laying Vessel Market, by Procurement Structure: Market size by category, 2025 154
Figure 34. Global Cable Laying Vessel Market, by Cable Payload Capacity: Market share evolution, 2025-2032 160
Figure 35. Global Cable Laying Vessel Market, by Cable Payload Capacity: Market size by category, 2025 160
Figure 36. Global Cable Laying Vessel Market, by Cable Payload Capacity: Market size and growth, 2025-2032 161
Figure 37. Global Cable Laying Vessel Market, by Cable-Laying Depth Capability: Market share evolution, 2025-2032 169
Figure 38. Global Cable Laying Vessel Market, by Cable-Laying Depth Capability: Market size by category, 2025 169
Figure 39. Global Cable Laying Vessel Market, by Cable-Laying Depth Capability: Market size and growth, 2025-2032 170
Figure 40. Global Cable Laying Vessel Market, by Region: Market share evolution, 2025-2032 179
Figure 41. Global Cable Laying Vessel Market, by Region: Market size by category, 2025 179
Figure 42. Global Cable Laying Vessel Market, Regional growth by Onboard Power Architecture, 2025-2032 (CAGR %) 180
Figure 43. Global Cable Laying Vessel Market Size, by Group, 2025 vs 2026 vs 2032 212
Figure 44. Global Cable Laying Vessel Market Size, by Country, 2025 vs 2032 (%) 246
Figure 45. Global Cable Laying Vessel Market Size, by Country, 2025 vs 2026 vs 2032 247
Figure 46. Global Cable Laying Vessel Market, Forecast growth by country, 2025-2032 (CAGR %) 247
Figure 47. Global Cable Laying Vessel Market Share, by Key Player, 2025 311

List of Tables

Table 1. Global Cable Laying Vessel Market Segmentation & Coverage 12
Table 2. Global Cable Laying Vessel Market Size, 2017-2032 (USD Thousand) 29
Table 3. Global Cable Laying Vessel Market, Key Growth Contribution, 2025-2032 31
Table 4. Global Cable Laying Vessel Market, by Vessel Platform growth contribution, 2025-2032 66
Table 5. Global Cable Laying Vessel Market Size, by Vessel Platform, 2017-2032 (USD Thousand) 67
Table 6. Global Cable Laying Vessel Market Size, by Ships, by Region, 2017-2032 (USD Thousand) 67
Table 7. Global Cable Laying Vessel Market Size, by Ships, by Group, 2017-2032 (USD Thousand) 67
Table 8. Global Cable Laying Vessel Market Size, by Ships, by Country, 2017-2032 (USD Thousand) 68
Table 9. Global Cable Laying Vessel Market Size, by Barges, by Region, 2017-2032 (USD Thousand) 68
Table 10. Global Cable Laying Vessel Market Size, by Barges, by Group, 2017-2032 (USD Thousand) 69
Table 11. Global Cable Laying Vessel Market Size, by Barges, by Country, 2017-2032 (USD Thousand) 69
Table 12. Global Cable Laying Vessel Market, by Mission Configuration growth contribution, 2025-2032 72
Table 13. Global Cable Laying Vessel Market Size, by Mission Configuration, 2017-2032 (USD Thousand) 73
Table 14. Global Cable Laying Vessel Market Size, by Installation-Focused Vessels, by Region, 2017-2032 (USD Thousand) 74
Table 15. Global Cable Laying Vessel Market Size, by Installation-Focused Vessels, by Group, 2017-2032 (USD Thousand) 74
Table 16. Global Cable Laying Vessel Market Size, by Installation-Focused Vessels, by Country, 2017-2032 (USD Thousand) 75
Table 17. Global Cable Laying Vessel Market Size, by Multipurpose Construction Vessels, by Region, 2017-2032 (USD Thousand) 75
Table 18. Global Cable Laying Vessel Market Size, by Multipurpose Construction Vessels, by Group, 2017-2032 (USD Thousand) 76
Table 19. Global Cable Laying Vessel Market Size, by Multipurpose Construction Vessels, by Country, 2017-2032 (USD Thousand) 76
Table 20. Global Cable Laying Vessel Market Size, by Combined Installation and Repair Vessels, by Region, 2017-2032 (USD Thousand) 77
Table 21. Global Cable Laying Vessel Market Size, by Combined Installation and Repair Vessels, by Group, 2017-2032 (USD Thousand) 77
Table 22. Global Cable Laying Vessel Market Size, by Combined Installation and Repair Vessels, by Country, 2017-2032 (USD Thousand) 78

Table 23. Global Cable Laying Vessel Market Size, by Repair-Focused Vessels, by Region, 2017-2032 (USD Thousand) 78
Table 24. Global Cable Laying Vessel Market Size, by Repair-Focused Vessels, by Group, 2017-2032 (USD Thousand) 79
Table 25. Global Cable Laying Vessel Market Size, by Repair-Focused Vessels, by Country, 2017-2032 (USD Thousand) 79
Table 26. Global Cable Laying Vessel Market, by Cable Compatibility growth contribution, 2025-2032 83
Table 27. Global Cable Laying Vessel Market Size, by Cable Compatibility, 2017-2032 (USD Thousand) 83
Table 28. Global Cable Laying Vessel Market Size, by Multiple Cable Families, by Region, 2017-2032 (USD Thousand) 84
Table 29. Global Cable Laying Vessel Market Size, by Multiple Cable Families, by Group, 2017-2032 (USD Thousand) 84
Table 30. Global Cable Laying Vessel Market Size, by Multiple Cable Families, by Country, 2017-2032 (USD Thousand) 85
Table 31. Global Cable Laying Vessel Market Size, by Power Cables Only, by Region, 2017-2032 (USD Thousand) 85
Table 32. Global Cable Laying Vessel Market Size, by Power Cables Only, by Group, 2017-2032 (USD Thousand) 86
Table 33. Global Cable Laying Vessel Market Size, by Power Cables Only, by Country, 2017-2032 (USD Thousand) 86
Table 34. Global Cable Laying Vessel Market Size, by Communications Cables Only, by Region, 2017-2032 (USD Thousand) 87
Table 35. Global Cable Laying Vessel Market Size, by Communications Cables Only, by Group, 2017-2032 (USD Thousand) 87
Table 36. Global Cable Laying Vessel Market Size, by Communications Cables Only, by Country, 2017-2032 (USD Thousand) 88
Table 37. Global Cable Laying Vessel Market Size, by Sensing Cables Only, by Region, 2017-2032 (USD Thousand) 88
Table 38. Global Cable Laying Vessel Market Size, by Sensing Cables Only, by Group, 2017-2032 (USD Thousand) 89
Table 39. Global Cable Laying Vessel Market Size, by Sensing Cables Only, by Country, 2017-2032 (USD Thousand) 89
Table 40. Global Cable Laying Vessel Market, by Station-Keeping System growth contribution, 2025-2032 92
Table 41. Global Cable Laying Vessel Market Size, by Station-Keeping System, 2017-2032 (USD Thousand) 93
Table 42. Global Cable Laying Vessel Market Size, by DP Class 2, by Region, 2017-2032 (USD Thousand) 94
Table 43. Global Cable Laying Vessel Market Size, by DP Class 2, by Group, 2017-2032 (USD Thousand) 94
Table 44. Global Cable Laying Vessel Market Size, by DP Class 2, by Country, 2017-2032 (USD Thousand) 95

Table 45. Global Cable Laying Vessel Market Size, by DP Class 3, by Region, 2017-2032 (USD Thousand) 95
Table 46. Global Cable Laying Vessel Market Size, by DP Class 3, by Group, 2017-2032 (USD Thousand) 96
Table 47. Global Cable Laying Vessel Market Size, by DP Class 3, by Country, 2017-2032 (USD Thousand) 96
Table 48. Global Cable Laying Vessel Market Size, by Anchored or Moored Positioning, by Region, 2017-2032 (USD Thousand) 97
Table 49. Global Cable Laying Vessel Market Size, by Anchored or Moored Positioning, by Group, 2017-2032 (USD Thousand) 97
Table 50. Global Cable Laying Vessel Market Size, by Anchored or Moored Positioning, by Country, 2017-2032 (USD Thousand) 98
Table 51. Global Cable Laying Vessel Market Size, by DP Class 1, by Region, 2017-2032 (USD Thousand) 98
Table 52. Global Cable Laying Vessel Market Size, by DP Class 1, by Group, 2017-2032 (USD Thousand) 99
Table 53. Global Cable Laying Vessel Market Size, by DP Class 1, by Country, 2017-2032 (USD Thousand) 99
Table 54. Global Cable Laying Vessel Market Size, by Manual or Tug-Assisted Positioning, by Region, 2017-2032 (USD Thousand) 100
Table 55. Global Cable Laying Vessel Market Size, by Manual or Tug-Assisted Positioning, by Group, 2017-2032 (USD Thousand) 100
Table 56. Global Cable Laying Vessel Market Size, by Manual or Tug-Assisted Positioning, by Country, 2017-2032 (USD Thousand) 101
Table 57. Global Cable Laying Vessel Market Size, by Seabed-Supported Positioning, by Region, 2017-2032 (USD Thousand) 101
Table 58. Global Cable Laying Vessel Market Size, by Seabed-Supported Positioning, by Group, 2017-2032 (USD Thousand) 102
Table 59. Global Cable Laying Vessel Market Size, by Seabed-Supported Positioning, by Country, 2017-2032 (USD Thousand) 102
Table 60. Global Cable Laying Vessel Market Size, by Basic Automatic Positioning, by Region, 2017-2032 (USD Thousand) 103
Table 61. Global Cable Laying Vessel Market Size, by Basic Automatic Positioning, by Group, 2017-2032 (USD Thousand) 103
Table 62. Global Cable Laying Vessel Market Size, by Basic Automatic Positioning, by Country, 2017-2032 (USD Thousand) 104
Table 63. Global Cable Laying Vessel Market, by Onboard Power Architecture growth contribution, 2025-2032 107
Table 64. Global Cable Laying Vessel Market Size, by Onboard Power Architecture, 2017-2032 (USD Thousand) 107
Table 65. Global Cable Laying Vessel Market Size, by Hybrid Electric Power, by Region, 2017-2032 (USD Thousand) 108
Table 66. Global Cable Laying Vessel Market Size, by Hybrid Electric Power, by Group, 2017-2032 (USD Thousand) 109

Table 67. Global Cable Laying Vessel Market Size, by Hybrid Electric Power, by Country, 2017-2032 (USD Thousand) 109
Table 68. Global Cable Laying Vessel Market Size, by Conventional Engine-Based Power, by Region, 2017-2032 (USD Thousand) 110
Table 69. Global Cable Laying Vessel Market Size, by Conventional Engine-Based Power, by Group, 2017-2032 (USD Thousand) 110
Table 70. Global Cable Laying Vessel Market Size, by Conventional Engine-Based Power, by Country, 2017-2032 (USD Thousand) 111
Table 71. Global Cable Laying Vessel Market Size, by All-Electric Power, by Region, 2017-2032 (USD Thousand) 111
Table 72. Global Cable Laying Vessel Market Size, by All-Electric Power, by Group, 2017-2032 (USD Thousand) 112
Table 73. Global Cable Laying Vessel Market Size, by All-Electric Power, by Country, 2017-2032 (USD Thousand) 112
Table 74. Global Cable Laying Vessel Market, by Infrastructure Application growth contribution, 2025-2032 117
Table 75. Global Cable Laying Vessel Market Size, by Infrastructure Application, 2017-2032 (USD Thousand) 118
Table 76. Global Cable Laying Vessel Market Size, by Multi-Infrastructure Portfolios, by Region, 2017-2032 (USD Thousand) 119
Table 77. Global Cable Laying Vessel Market Size, by Multi-Infrastructure Portfolios, by Group, 2017-2032 (USD Thousand) 119
Table 78. Global Cable Laying Vessel Market Size, by Multi-Infrastructure Portfolios, by Country, 2017-2032 (USD Thousand) 120
Table 79. Global Cable Laying Vessel Market Size, by Offshore Renewable Energy, by Region, 2017-2032 (USD Thousand) 120
Table 80. Global Cable Laying Vessel Market Size, by Offshore Renewable Energy, by Group, 2017-2032 (USD Thousand) 121
Table 81. Global Cable Laying Vessel Market Size, by Offshore Renewable Energy, by Country, 2017-2032 (USD Thousand) 121
Table 82. Global Cable Laying Vessel Market Size, by Telecommunications Networks, by Region, 2017-2032 (USD Thousand) 122
Table 83. Global Cable Laying Vessel Market Size, by Telecommunications Networks, by Group, 2017-2032 (USD Thousand) 122
Table 84. Global Cable Laying Vessel Market Size, by Telecommunications Networks, by Country, 2017-2032 (USD Thousand) 123
Table 85. Global Cable Laying Vessel Market Size, by Power Transmission and Distribution, by Region, 2017-2032 (USD Thousand) 123
Table 86. Global Cable Laying Vessel Market Size, by Power Transmission and Distribution, by Group, 2017-2032 (USD Thousand) 124
Table 87. Global Cable Laying Vessel Market Size, by Power Transmission and Distribution, by Country, 2017-2032 (USD Thousand) 124
Table 88. Global Cable Laying Vessel Market Size, by Defense and Security Networks, by Region, 2017-2032 (USD Thousand) 125

Table 89. Global Cable Laying Vessel Market Size, by Defense and Security Networks, by Group, 2017-2032 (USD Thousand) 125
Table 90. Global Cable Laying Vessel Market Size, by Defense and Security Networks, by Country, 2017-2032 (USD Thousand) 126
Table 91. Global Cable Laying Vessel Market Size, by Scientific and Environmental Monitoring, by Region, 2017-2032 (USD Thousand) 126
Table 92. Global Cable Laying Vessel Market Size, by Scientific and Environmental Monitoring, by Group, 2017-2032 (USD Thousand) 127
Table 93. Global Cable Laying Vessel Market Size, by Scientific and Environmental Monitoring, by Country, 2017-2032 (USD Thousand) 127
Table 94. Global Cable Laying Vessel Market Size, by Industrial Infrastructure, by Region, 2017-2032 (USD Thousand) 128
Table 95. Global Cable Laying Vessel Market Size, by Industrial Infrastructure, by Group, 2017-2032 (USD Thousand) 128
Table 96. Global Cable Laying Vessel Market Size, by Industrial Infrastructure, by Country, 2017-2032 (USD Thousand) 129
Table 97. Global Cable Laying Vessel Market, by Vessel Buyer growth contribution, 2025-2032 133
Table 98. Global Cable Laying Vessel Market Size, by Vessel Buyer, 2017-2032 (USD Thousand) 133
Table 99. Global Cable Laying Vessel Market Size, by Marine Installation and Maintenance Contractors, by Region, 2017-2032 (USD Thousand) 134
Table 100. Global Cable Laying Vessel Market Size, by Marine Installation and Maintenance Contractors, by Group, 2017-2032 (USD Thousand) 134
Table 101. Global Cable Laying Vessel Market Size, by Marine Installation and Maintenance Contractors, by Country, 2017-2032 (USD Thousand) 135
Table 102. Global Cable Laying Vessel Market Size, by Integrated Cable-System Suppliers, by Region, 2017-2032 (USD Thousand) 135
Table 103. Global Cable Laying Vessel Market Size, by Integrated Cable-System Suppliers, by Group, 2017-2032 (USD Thousand) 136
Table 104. Global Cable Laying Vessel Market Size, by Integrated Cable-System Suppliers, by Country, 2017-2032 (USD Thousand) 136
Table 105. Global Cable Laying Vessel Market Size, by Vessel Owners and Leasing Companies, by Region, 2017-2032 (USD Thousand) 137
Table 106. Global Cable Laying Vessel Market Size, by Vessel Owners and Leasing Companies, by Group, 2017-2032 (USD Thousand) 137
Table 107. Global Cable Laying Vessel Market Size, by Vessel Owners and Leasing Companies, by Country, 2017-2032 (USD Thousand) 138
Table 108. Global Cable Laying Vessel Market Size, by Captive Infrastructure and Public-Service Operators, by Region, 2017-2032 (USD Thousand) 138
Table 109. Global Cable Laying Vessel Market Size, by Captive Infrastructure and Public-Service Operators, by Group, 2017-2032 (USD Thousand) 139
Table 110. Global Cable Laying Vessel Market Size, by Captive Infrastructure and Public-Service Operators, by Country, 2017-2032 (USD Thousand) 139
Table 111. Global Cable Laying Vessel Market, by Construction Pathway growth contribution, 2025-2032 141

Table 112. Global Cable Laying Vessel Market Size, by Construction Pathway, 2017-2032 (USD Thousand) 142
Table 113. Global Cable Laying Vessel Market Size, by Newbuilds, by Region, 2017-2032 (USD Thousand) 142
Table 114. Global Cable Laying Vessel Market Size, by Newbuilds, by Group, 2017-2032 (USD Thousand) 142
Table 115. Global Cable Laying Vessel Market Size, by Newbuilds, by Country, 2017-2032 (USD Thousand) 143
Table 116. Global Cable Laying Vessel Market Size, by Conversions, by Region, 2017-2032 (USD Thousand) 143
Table 117. Global Cable Laying Vessel Market Size, by Conversions, by Group, 2017-2032 (USD Thousand) 144
Table 118. Global Cable Laying Vessel Market Size, by Conversions, by Country, 2017-2032 (USD Thousand) 144
Table 119. Global Cable Laying Vessel Market, by Operating Envelope growth contribution, 2025-2032 147
Table 120. Global Cable Laying Vessel Market Size, by Operating Envelope, 2017-2032 (USD Thousand) 147
Table 121. Global Cable Laying Vessel Market Size, by Unrestricted Seagoing, by Region, 2017-2032 (USD Thousand) 148
Table 122. Global Cable Laying Vessel Market Size, by Unrestricted Seagoing, by Group, 2017-2032 (USD Thousand) 148
Table 123. Global Cable Laying Vessel Market Size, by Unrestricted Seagoing, by Country, 2017-2032 (USD Thousand) 149
Table 124. Global Cable Laying Vessel Market Size, by Restricted Seagoing, by Region, 2017-2032 (USD Thousand) 149
Table 125. Global Cable Laying Vessel Market Size, by Restricted Seagoing, by Group, 2017-2032 (USD Thousand) 150
Table 126. Global Cable Laying Vessel Market Size, by Restricted Seagoing, by Country, 2017-2032 (USD Thousand) 150
Table 127. Global Cable Laying Vessel Market Size, by Sheltered and Inland Waters, by Region, 2017-2032 (USD Thousand) 151
Table 128. Global Cable Laying Vessel Market Size, by Sheltered and Inland Waters, by Group, 2017-2032 (USD Thousand) 151
Table 129. Global Cable Laying Vessel Market Size, by Sheltered and Inland Waters, by Country, 2017-2032 (USD Thousand) 152
Table 130. Global Cable Laying Vessel Market, by Procurement Structure growth contribution, 2025-2032 154
Table 131. Global Cable Laying Vessel Market Size, by Procurement Structure, 2017-2032 (USD Thousand) 155
Table 132. Global Cable Laying Vessel Market Size, by Single-Prime Delivery, by Region, 2017-2032 (USD Thousand) 155
Table 133. Global Cable Laying Vessel Market Size, by Single-Prime Delivery, by Group, 2017-2032 (USD Thousand) 156

Table 134. Global Cable Laying Vessel Market Size, by Single-Prime Delivery, by Country, 2017-2032 (USD Thousand) 156
Table 135. Global Cable Laying Vessel Market Size, by Buyer-Managed Package Delivery, by Region, 2017-2032 (USD Thousand) 157
Table 136. Global Cable Laying Vessel Market Size, by Buyer-Managed Package Delivery, by Group, 2017-2032 (USD Thousand) 157
Table 137. Global Cable Laying Vessel Market Size, by Buyer-Managed Package Delivery, by Country, 2017-2032 (USD Thousand) 158
Table 138. Global Cable Laying Vessel Market, by Cable Payload Capacity growth contribution, 2025-2032 161
Table 139. Global Cable Laying Vessel Market Size, by Cable Payload Capacity, 2017-2032 (USD Thousand) 161
Table 140. Global Cable Laying Vessel Market Size, by High Cable Payload, by Region, 2017-2032 (USD Thousand) 162
Table 141. Global Cable Laying Vessel Market Size, by High Cable Payload, by Group, 2017-2032 (USD Thousand) 162
Table 142. Global Cable Laying Vessel Market Size, by High Cable Payload, by Country, 2017-2032 (USD Thousand) 163
Table 143. Global Cable Laying Vessel Market Size, by Ultra-High Cable Payload, by Region, 2017-2032 (USD Thousand) 163
Table 144. Global Cable Laying Vessel Market Size, by Ultra-High Cable Payload, by Group, 2017-2032 (USD Thousand) 164
Table 145. Global Cable Laying Vessel Market Size, by Ultra-High Cable Payload, by Country, 2017-2032 (USD Thousand) 164
Table 146. Global Cable Laying Vessel Market Size, by Medium Cable Payload, by Region, 2017-2032 (USD Thousand) 165
Table 147. Global Cable Laying Vessel Market Size, by Medium Cable Payload, by Group, 2017-2032 (USD Thousand) 165
Table 148. Global Cable Laying Vessel Market Size, by Medium Cable Payload, by Country, 2017-2032 (USD Thousand) 166
Table 149. Global Cable Laying Vessel Market Size, by Low Cable Payload, by Region, 2017-2032 (USD Thousand) 166
Table 150. Global Cable Laying Vessel Market Size, by Low Cable Payload, by Group, 2017-2032 (USD Thousand) 167
Table 151. Global Cable Laying Vessel Market Size, by Low Cable Payload, by Country, 2017-2032 (USD Thousand) 167
Table 152. Global Cable Laying Vessel Market, by Cable-Laying Depth Capability growth contribution, 2025-2032 170
Table 153. Global Cable Laying Vessel Market Size, by Cable-Laying Depth Capability, 2017-2032 (USD Thousand) 171
Table 154. Global Cable Laying Vessel Market Size, by Deepwater Capability, by Region, 2017-2032 (USD Thousand) 171
Table 155. Global Cable Laying Vessel Market Size, by Deepwater Capability, by Group, 2017-2032 (USD Thousand) 172

Table 156. Global Cable Laying Vessel Market Size, by Deepwater Capability, by Country, 2017-2032 (USD Thousand) 172
Table 157. Global Cable Laying Vessel Market Size, by Intermediate-Depth Capability, by Region, 2017-2032 (USD Thousand) 173
Table 158. Global Cable Laying Vessel Market Size, by Intermediate-Depth Capability, by Group, 2017-2032 (USD Thousand) 173
Table 159. Global Cable Laying Vessel Market Size, by Intermediate-Depth Capability, by Country, 2017-2032 (USD Thousand) 174
Table 160. Global Cable Laying Vessel Market Size, by Shallow-Water Capability, by Region, 2017-2032 (USD Thousand) 174
Table 161. Global Cable Laying Vessel Market Size, by Shallow-Water Capability, by Group, 2017-2032 (USD Thousand) 175
Table 162. Global Cable Laying Vessel Market Size, by Shallow-Water Capability, by Country, 2017-2032 (USD Thousand) 175
Table 163. Global Cable Laying Vessel Market Size, by Ultra-Deepwater Capability, by Region, 2017-2032 (USD Thousand) 176
Table 164. Global Cable Laying Vessel Market Size, by Ultra-Deepwater Capability, by Group, 2017-2032 (USD Thousand) 176
Table 165. Global Cable Laying Vessel Market Size, by Ultra-Deepwater Capability, by Country, 2017-2032 (USD Thousand) 177
Table 166. Global Cable Laying Vessel Market, by Region growth contribution, 2025-2032 180
Table 167. Global Cable Laying Vessel Market Size, by Region, 2017-2032 (USD Thousand) 180
Table 168. Europe Cable Laying Vessel Market, by Country growth contribution, 2025-2032 182
Table 169. Europe Cable Laying Vessel Market Size, by Region, 2017-2032 (USD Thousand) 183
Table 170. Europe Cable Laying Vessel Market Size, by Vessel Platform, 2017-2032 (USD Thousand) 183
Table 171. Europe Cable Laying Vessel Market Size, by Mission Configuration, 2017-2032 (USD Thousand) 184
Table 172. Europe Cable Laying Vessel Market Size, by Cable Compatibility, 2017-2032 (USD Thousand) 184
Table 173. Europe Cable Laying Vessel Market Size, by Station-Keeping System, 2017-2032 (USD Thousand) 184
Table 174. Europe Cable Laying Vessel Market Size, by Onboard Power Architecture, 2017-2032 (USD Thousand) 185
Table 175. Europe Cable Laying Vessel Market Size, by Infrastructure Application, 2017-2032 (USD Thousand) 185
Table 176. Europe Cable Laying Vessel Market Size, by Vessel Buyer, 2017-2032 (USD Thousand) 186
Table 177. Europe Cable Laying Vessel Market Size, by Construction Pathway, 2017-2032 (USD Thousand) 186
Table 178. Europe Cable Laying Vessel Market Size, by Operating Envelope, 2017-2032 (USD Thousand) 186
Table 179. Europe Cable Laying Vessel Market Size, by Procurement Structure, 2017-2032 (USD Thousand) 186

Table 180. Europe Cable Laying Vessel Market Size, by Cable Payload Capacity, 2017-2032 (USD Thousand) 187
Table 181. Europe Cable Laying Vessel Market Size, by Cable-Laying Depth Capability, 2017-2032 (USD Thousand) 187
Table 182. Asia-Pacific Cable Laying Vessel Market, by Country growth contribution, 2025-2032 188
Table 183. Asia-Pacific Cable Laying Vessel Market Size, by Region, 2017-2032 (USD Thousand) 188
Table 184. Asia-Pacific Cable Laying Vessel Market Size, by Vessel Platform, 2017-2032 (USD Thousand) 189
Table 185. Asia-Pacific Cable Laying Vessel Market Size, by Mission Configuration, 2017-2032 (USD Thousand) 189
Table 186. Asia-Pacific Cable Laying Vessel Market Size, by Cable Compatibility, 2017-2032 (USD Thousand) 189
Table 187. Asia-Pacific Cable Laying Vessel Market Size, by Station-Keeping System, 2017-2032 (USD Thousand) 190
Table 188. Asia-Pacific Cable Laying Vessel Market Size, by Onboard Power Architecture, 2017-2032 (USD Thousand) 190
Table 189. Asia-Pacific Cable Laying Vessel Market Size, by Infrastructure Application, 2017-2032 (USD Thousand) 191
Table 190. Asia-Pacific Cable Laying Vessel Market Size, by Vessel Buyer, 2017-2032 (USD Thousand) 191
Table 191. Asia-Pacific Cable Laying Vessel Market Size, by Construction Pathway, 2017-2032 (USD Thousand) 191
Table 192. Asia-Pacific Cable Laying Vessel Market Size, by Operating Envelope, 2017-2032 (USD Thousand) 192
Table 193. Asia-Pacific Cable Laying Vessel Market Size, by Procurement Structure, 2017-2032 (USD Thousand) 192
Table 194. Asia-Pacific Cable Laying Vessel Market Size, by Cable Payload Capacity, 2017-2032 (USD Thousand) 192
Table 195. Asia-Pacific Cable Laying Vessel Market Size, by Cable-Laying Depth Capability, 2017-2032 (USD Thousand) 192
Table 196. North America Cable Laying Vessel Market, by Country growth contribution, 2025-2032 193
Table 197. North America Cable Laying Vessel Market Size, by Region, 2017-2032 (USD Thousand) 193
Table 198. North America Cable Laying Vessel Market Size, by Vessel Platform, 2017-2032 (USD Thousand) 193
Table 199. North America Cable Laying Vessel Market Size, by Mission Configuration, 2017-2032 (USD Thousand) 193
Table 200. North America Cable Laying Vessel Market Size, by Cable Compatibility, 2017-2032 (USD Thousand) 194
Table 201. North America Cable Laying Vessel Market Size, by Station-Keeping System, 2017-2032 (USD Thousand) 194

Table 202. North America Cable Laying Vessel Market Size, by Onboard Power Architecture, 2017-2032 (USD Thousand) 194
Table 203. North America Cable Laying Vessel Market Size, by Infrastructure Application, 2017-2032 (USD Thousand) 195
Table 204. North America Cable Laying Vessel Market Size, by Vessel Buyer, 2017-2032 (USD Thousand) 195
Table 205. North America Cable Laying Vessel Market Size, by Construction Pathway, 2017-2032 (USD Thousand) 195
Table 206. North America Cable Laying Vessel Market Size, by Operating Envelope, 2017-2032 (USD Thousand) 196
Table 207. North America Cable Laying Vessel Market Size, by Procurement Structure, 2017-2032 (USD Thousand) 196
Table 208. North America Cable Laying Vessel Market Size, by Cable Payload Capacity, 2017-2032 (USD Thousand) 196
Table 209. North America Cable Laying Vessel Market Size, by Cable-Laying Depth Capability, 2017-2032 (USD Thousand) 196
Table 210. Middle East Cable Laying Vessel Market, by Country growth contribution, 2025-2032 197
Table 211. Middle East Cable Laying Vessel Market Size, by Region, 2017-2032 (USD Thousand) 197
Table 212. Middle East Cable Laying Vessel Market Size, by Vessel Platform, 2017-2032 (USD Thousand) 197
Table 213. Middle East Cable Laying Vessel Market Size, by Mission Configuration, 2017-2032 (USD Thousand) 198
Table 214. Middle East Cable Laying Vessel Market Size, by Cable Compatibility, 2017-2032 (USD Thousand) 198
Table 215. Middle East Cable Laying Vessel Market Size, by Station-Keeping System, 2017-2032 (USD Thousand) 198
Table 216. Middle East Cable Laying Vessel Market Size, by Onboard Power Architecture, 2017-2032 (USD Thousand) 199
Table 217. Middle East Cable Laying Vessel Market Size, by Infrastructure Application, 2017-2032 (USD Thousand) 199
Table 218. Middle East Cable Laying Vessel Market Size, by Vessel Buyer, 2017-2032 (USD Thousand) 199
Table 219. Middle East Cable Laying Vessel Market Size, by Construction Pathway, 2017-2032 (USD Thousand) 200
Table 220. Middle East Cable Laying Vessel Market Size, by Operating Envelope, 2017-2032 (USD Thousand) 200
Table 221. Middle East Cable Laying Vessel Market Size, by Procurement Structure, 2017-2032 (USD Thousand) 200
Table 222. Middle East Cable Laying Vessel Market Size, by Cable Payload Capacity, 2017-2032 (USD Thousand) 200
Table 223. Middle East Cable Laying Vessel Market Size, by Cable-Laying Depth Capability, 2017-2032 (USD Thousand) 201
Table 224. Latin America Cable Laying Vessel Market, by Country growth contribution, 2025-2032 201

Table 225. Latin America Cable Laying Vessel Market Size, by Region, 2017-2032 (USD Thousand) 201
Table 226. Latin America Cable Laying Vessel Market Size, by Vessel Platform, 2017-2032 (USD Thousand) 202
Table 227. Latin America Cable Laying Vessel Market Size, by Mission Configuration, 2017-2032 (USD Thousand) 202
Table 228. Latin America Cable Laying Vessel Market Size, by Cable Compatibility, 2017-2032 (USD Thousand) 202
Table 229. Latin America Cable Laying Vessel Market Size, by Station-Keeping System, 2017-2032 (USD Thousand) 203
Table 230. Latin America Cable Laying Vessel Market Size, by Onboard Power Architecture, 2017-2032 (USD Thousand) 203
Table 231. Latin America Cable Laying Vessel Market Size, by Infrastructure Application, 2017-2032 (USD Thousand) 204
Table 232. Latin America Cable Laying Vessel Market Size, by Vessel Buyer, 2017-2032 (USD Thousand) 204
Table 233. Latin America Cable Laying Vessel Market Size, by Construction Pathway, 2017-2032 (USD Thousand) 204
Table 234. Latin America Cable Laying Vessel Market Size, by Operating Envelope, 2017-2032 (USD Thousand) 205
Table 235. Latin America Cable Laying Vessel Market Size, by Procurement Structure, 2017-2032 (USD Thousand) 205
Table 236. Latin America Cable Laying Vessel Market Size, by Cable Payload Capacity, 2017-2032 (USD Thousand) 205
Table 237. Latin America Cable Laying Vessel Market Size, by Cable-Laying Depth Capability, 2017-2032 (USD Thousand) 205
Table 238. Africa Cable Laying Vessel Market, by Country growth contribution, 2025-2032 206
Table 239. Africa Cable Laying Vessel Market Size, by Region, 2017-2032 (USD Thousand) 206
Table 240. Africa Cable Laying Vessel Market Size, by Vessel Platform, 2017-2032 (USD Thousand) 206
Table 241. Africa Cable Laying Vessel Market Size, by Mission Configuration, 2017-2032 (USD Thousand) 206
Table 242. Africa Cable Laying Vessel Market Size, by Cable Compatibility, 2017-2032 (USD Thousand) 207
Table 243. Africa Cable Laying Vessel Market Size, by Station-Keeping System, 2017-2032 (USD Thousand) 207
Table 244. Africa Cable Laying Vessel Market Size, by Onboard Power Architecture, 2017-2032 (USD Thousand) 207
Table 245. Africa Cable Laying Vessel Market Size, by Infrastructure Application, 2017-2032 (USD Thousand) 208
Table 246. Africa Cable Laying Vessel Market Size, by Vessel Buyer, 2017-2032 (USD Thousand) 208
Table 247. Africa Cable Laying Vessel Market Size, by Construction Pathway, 2017-2032 (USD Thousand) 208

Table 248. Africa Cable Laying Vessel Market Size, by Operating Envelope, 2017-2032 (USD Thousand) 209
Table 249. Africa Cable Laying Vessel Market Size, by Procurement Structure, 2017-2032 (USD Thousand) 209
Table 250. Africa Cable Laying Vessel Market Size, by Cable Payload Capacity, 2017-2032 (USD Thousand) 209
Table 251. Africa Cable Laying Vessel Market Size, by Cable-Laying Depth Capability, 2017-2032 (USD Thousand) 209
Table 252. Global Cable Laying Vessel Market Size, by Group, 2017-2032 (USD Thousand) 212
Table 253. NATO Cable Laying Vessel Market, by Country growth contribution, 2025-2032 214
Table 254. NATO Cable Laying Vessel Market Size, by Group, 2017-2032 (USD Thousand) 216
Table 255. NATO Cable Laying Vessel Market Size, by Vessel Platform, 2017-2032 (USD Thousand) 217
Table 256. NATO Cable Laying Vessel Market Size, by Mission Configuration, 2017-2032 (USD Thousand) 217
Table 257. NATO Cable Laying Vessel Market Size, by Cable Compatibility, 2017-2032 (USD Thousand) 217
Table 258. NATO Cable Laying Vessel Market Size, by Station-Keeping System, 2017-2032 (USD Thousand) 218
Table 259. NATO Cable Laying Vessel Market Size, by Onboard Power Architecture, 2017-2032 (USD Thousand) 218
Table 260. NATO Cable Laying Vessel Market Size, by Infrastructure Application, 2017-2032 (USD Thousand) 219
Table 261. NATO Cable Laying Vessel Market Size, by Vessel Buyer, 2017-2032 (USD Thousand) 219
Table 262. NATO Cable Laying Vessel Market Size, by Construction Pathway, 2017-2032 (USD Thousand) 219
Table 263. NATO Cable Laying Vessel Market Size, by Operating Envelope, 2017-2032 (USD Thousand) 220
Table 264. NATO Cable Laying Vessel Market Size, by Procurement Structure, 2017-2032 (USD Thousand) 220
Table 265. NATO Cable Laying Vessel Market Size, by Cable Payload Capacity, 2017-2032 (USD Thousand) 220
Table 266. NATO Cable Laying Vessel Market Size, by Cable-Laying Depth Capability, 2017-2032 (USD Thousand) 220
Table 267. European Union Cable Laying Vessel Market, by Country growth contribution, 2025-2032 221
Table 268. European Union Cable Laying Vessel Market Size, by Group, 2017-2032 (USD Thousand) 222
Table 269. European Union Cable Laying Vessel Market Size, by Vessel Platform, 2017-2032 (USD Thousand) 223
Table 270. European Union Cable Laying Vessel Market Size, by Mission Configuration, 2017-2032 (USD Thousand) 223
Table 271. European Union Cable Laying Vessel Market Size, by Cable Compatibility, 2017-2032 (USD Thousand) 223

Table 272. European Union Cable Laying Vessel Market Size, by Station-Keeping System, 2017-2032 (USD Thousand) 224
Table 273. European Union Cable Laying Vessel Market Size, by Onboard Power Architecture, 2017-2032 (USD Thousand) 224
Table 274. European Union Cable Laying Vessel Market Size, by Infrastructure Application, 2017-2032 (USD Thousand) 225
Table 275. European Union Cable Laying Vessel Market Size, by Vessel Buyer, 2017-2032 (USD Thousand) 225
Table 276. European Union Cable Laying Vessel Market Size, by Construction Pathway, 2017-2032 (USD Thousand) 225
Table 277. European Union Cable Laying Vessel Market Size, by Operating Envelope, 2017-2032 (USD Thousand) 226
Table 278. European Union Cable Laying Vessel Market Size, by Procurement Structure, 2017-2032 (USD Thousand) 226
Table 279. European Union Cable Laying Vessel Market Size, by Cable Payload Capacity, 2017-2032 (USD Thousand) 226
Table 280. European Union Cable Laying Vessel Market Size, by Cable-Laying Depth Capability, 2017-2032 (USD Thousand) 226
Table 281. G7 Cable Laying Vessel Market, by Country growth contribution, 2025-2032 227
Table 282. G7 Cable Laying Vessel Market Size, by Group, 2017-2032 (USD Thousand) 227
Table 283. G7 Cable Laying Vessel Market Size, by Vessel Platform, 2017-2032 (USD Thousand) 227
Table 284. G7 Cable Laying Vessel Market Size, by Mission Configuration, 2017-2032 (USD Thousand) 228
Table 285. G7 Cable Laying Vessel Market Size, by Cable Compatibility, 2017-2032 (USD Thousand) 228
Table 286. G7 Cable Laying Vessel Market Size, by Station-Keeping System, 2017-2032 (USD Thousand) 228
Table 287. G7 Cable Laying Vessel Market Size, by Onboard Power Architecture, 2017-2032 (USD Thousand) 229
Table 288. G7 Cable Laying Vessel Market Size, by Infrastructure Application, 2017-2032 (USD Thousand) 229
Table 289. G7 Cable Laying Vessel Market Size, by Vessel Buyer, 2017-2032 (USD Thousand) 229
Table 290. G7 Cable Laying Vessel Market Size, by Construction Pathway, 2017-2032 (USD Thousand) 230
Table 291. G7 Cable Laying Vessel Market Size, by Operating Envelope, 2017-2032 (USD Thousand) 230
Table 292. G7 Cable Laying Vessel Market Size, by Procurement Structure, 2017-2032 (USD Thousand) 230
Table 293. G7 Cable Laying Vessel Market Size, by Cable Payload Capacity, 2017-2032 (USD Thousand) 230
Table 294. G7 Cable Laying Vessel Market Size, by Cable-Laying Depth Capability, 2017-2032 (USD Thousand) 231
Table 295. BRICS Cable Laying Vessel Market, by Country growth contribution, 2025-2032 231

Table 296. BRICS Cable Laying Vessel Market Size, by Group, 2017-2032 (USD Thousand) 231
Table 297. BRICS Cable Laying Vessel Market Size, by Vessel Platform, 2017-2032 (USD Thousand) 231
Table 298. BRICS Cable Laying Vessel Market Size, by Mission Configuration, 2017-2032 (USD Thousand) 232
Table 299. BRICS Cable Laying Vessel Market Size, by Cable Compatibility, 2017-2032 (USD Thousand) 232
Table 300. BRICS Cable Laying Vessel Market Size, by Station-Keeping System, 2017-2032 (USD Thousand) 232
Table 301. BRICS Cable Laying Vessel Market Size, by Onboard Power Architecture, 2017-2032 (USD Thousand) 233
Table 302. BRICS Cable Laying Vessel Market Size, by Infrastructure Application, 2017-2032 (USD Thousand) 233
Table 303. BRICS Cable Laying Vessel Market Size, by Vessel Buyer, 2017-2032 (USD Thousand) 234
Table 304. BRICS Cable Laying Vessel Market Size, by Construction Pathway, 2017-2032 (USD Thousand) 234
Table 305. BRICS Cable Laying Vessel Market Size, by Operating Envelope, 2017-2032 (USD Thousand) 234
Table 306. BRICS Cable Laying Vessel Market Size, by Procurement Structure, 2017-2032 (USD Thousand) 234
Table 307. BRICS Cable Laying Vessel Market Size, by Cable Payload Capacity, 2017-2032 (USD Thousand) 235
Table 308. BRICS Cable Laying Vessel Market Size, by Cable-Laying Depth Capability, 2017-2032 (USD Thousand) 235
Table 309. ASEAN Cable Laying Vessel Market, by Country growth contribution, 2025-2032 235
Table 310. ASEAN Cable Laying Vessel Market Size, by Group, 2017-2032 (USD Thousand) 236
Table 311. ASEAN Cable Laying Vessel Market Size, by Vessel Platform, 2017-2032 (USD Thousand) 236
Table 312. ASEAN Cable Laying Vessel Market Size, by Mission Configuration, 2017-2032 (USD Thousand) 236
Table 313. ASEAN Cable Laying Vessel Market Size, by Cable Compatibility, 2017-2032 (USD Thousand) 237
Table 314. ASEAN Cable Laying Vessel Market Size, by Station-Keeping System, 2017-2032 (USD Thousand) 237
Table 315. ASEAN Cable Laying Vessel Market Size, by Onboard Power Architecture, 2017-2032 (USD Thousand) 237
Table 316. ASEAN Cable Laying Vessel Market Size, by Infrastructure Application, 2017-2032 (USD Thousand) 238
Table 317. ASEAN Cable Laying Vessel Market Size, by Vessel Buyer, 2017-2032 (USD Thousand) 238
Table 318. ASEAN Cable Laying Vessel Market Size, by Construction Pathway, 2017-2032 (USD Thousand) 238

Table 319. ASEAN Cable Laying Vessel Market Size, by Operating Envelope, 2017-2032 (USD Thousand) 239
Table 320. ASEAN Cable Laying Vessel Market Size, by Procurement Structure, 2017-2032 (USD Thousand) 239
Table 321. ASEAN Cable Laying Vessel Market Size, by Cable Payload Capacity, 2017-2032 (USD Thousand) 239
Table 322. ASEAN Cable Laying Vessel Market Size, by Cable-Laying Depth Capability, 2017-2032 (USD Thousand) 239
Table 323. GCC Cable Laying Vessel Market, by Country growth contribution, 2025-2032 240
Table 324. GCC Cable Laying Vessel Market Size, by Group, 2017-2032 (USD Thousand) 240
Table 325. GCC Cable Laying Vessel Market Size, by Vessel Platform, 2017-2032 (USD Thousand) 240
Table 326. GCC Cable Laying Vessel Market Size, by Mission Configuration, 2017-2032 (USD Thousand) 241
Table 327. GCC Cable Laying Vessel Market Size, by Cable Compatibility, 2017-2032 (USD Thousand) 241
Table 328. GCC Cable Laying Vessel Market Size, by Station-Keeping System, 2017-2032 (USD Thousand) 241
Table 329. GCC Cable Laying Vessel Market Size, by Onboard Power Architecture, 2017-2032 (USD Thousand) 242
Table 330. GCC Cable Laying Vessel Market Size, by Infrastructure Application, 2017-2032 (USD Thousand) 242
Table 331. GCC Cable Laying Vessel Market Size, by Vessel Buyer, 2017-2032 (USD Thousand) 242
Table 332. GCC Cable Laying Vessel Market Size, by Construction Pathway, 2017-2032 (USD Thousand) 243
Table 333. GCC Cable Laying Vessel Market Size, by Operating Envelope, 2017-2032 (USD Thousand) 243
Table 334. GCC Cable Laying Vessel Market Size, by Procurement Structure, 2017-2032 (USD Thousand) 243
Table 335. GCC Cable Laying Vessel Market Size, by Cable Payload Capacity, 2017-2032 (USD Thousand) 243
Table 336. GCC Cable Laying Vessel Market Size, by Cable-Laying Depth Capability, 2017-2032 (USD Thousand) 244
Table 337. Global Cable Laying Vessel Market, by Country growth contribution, 2025-2032 248
Table 338. Global Cable Laying Vessel Market Size, by Country, 2017-2032 (USD Thousand) 249
Table 339. Italy Cable Laying Vessel Market Size, 2017-2032 (USD Thousand) 250
Table 340. Italy Cable Laying Vessel Market Size, by Vessel Platform, 2017-2032 (USD Thousand) 250
Table 341. Italy Cable Laying Vessel Market Size, by Mission Configuration, 2017-2032 (USD Thousand) 250
Table 342. Italy Cable Laying Vessel Market Size, by Cable Compatibility, 2017-2032 (USD Thousand) 251
Table 343. Italy Cable Laying Vessel Market Size, by Station-Keeping System, 2017-2032 (USD Thousand) 251

Table 344. Italy Cable Laying Vessel Market Size, by Onboard Power Architecture, 2017-2032 (USD Thousand) 251
Table 345. Italy Cable Laying Vessel Market Size, by Infrastructure Application, 2017-2032 (USD Thousand) 252
Table 346. Italy Cable Laying Vessel Market Size, by Vessel Buyer, 2017-2032 (USD Thousand) 252
Table 347. Italy Cable Laying Vessel Market Size, by Construction Pathway, 2017-2032 (USD Thousand) 252
Table 348. Italy Cable Laying Vessel Market Size, by Operating Envelope, 2017-2032 (USD Thousand) 253
Table 349. Italy Cable Laying Vessel Market Size, by Procurement Structure, 2017-2032 (USD Thousand) 253
Table 350. Italy Cable Laying Vessel Market Size, by Cable Payload Capacity, 2017-2032 (USD Thousand) 253
Table 351. Italy Cable Laying Vessel Market Size, by Cable-Laying Depth Capability, 2017-2032 (USD Thousand) 253
Table 352. Japan Cable Laying Vessel Market Size, 2017-2032 (USD Thousand) 254
Table 353. Japan Cable Laying Vessel Market Size, by Vessel Platform, 2017-2032 (USD Thousand) 254
Table 354. Japan Cable Laying Vessel Market Size, by Mission Configuration, 2017-2032 (USD Thousand) 254
Table 355. Japan Cable Laying Vessel Market Size, by Cable Compatibility, 2017-2032 (USD Thousand) 254
Table 356. Japan Cable Laying Vessel Market Size, by Station-Keeping System, 2017-2032 (USD Thousand) 255
Table 357. Japan Cable Laying Vessel Market Size, by Onboard Power Architecture, 2017-2032 (USD Thousand) 255
Table 358. Japan Cable Laying Vessel Market Size, by Infrastructure Application, 2017-2032 (USD Thousand) 256
Table 359. Japan Cable Laying Vessel Market Size, by Vessel Buyer, 2017-2032 (USD Thousand) 256
Table 360. Japan Cable Laying Vessel Market Size, by Construction Pathway, 2017-2032 (USD Thousand) 256
Table 361. Japan Cable Laying Vessel Market Size, by Operating Envelope, 2017-2032 (USD Thousand) 257
Table 362. Japan Cable Laying Vessel Market Size, by Procurement Structure, 2017-2032 (USD Thousand) 257
Table 363. Japan Cable Laying Vessel Market Size, by Cable Payload Capacity, 2017-2032 (USD Thousand) 257
Table 364. Japan Cable Laying Vessel Market Size, by Cable-Laying Depth Capability, 2017-2032 (USD Thousand) 257
Table 365. China Cable Laying Vessel Market Size, 2017-2032 (USD Thousand) 258
Table 366. China Cable Laying Vessel Market Size, by Vessel Platform, 2017-2032 (USD Thousand) 258

Table 367. China Cable Laying Vessel Market Size, by Mission Configuration, 2017-2032 (USD Thousand) 258
Table 368. China Cable Laying Vessel Market Size, by Cable Compatibility, 2017-2032 (USD Thousand) 258
Table 369. China Cable Laying Vessel Market Size, by Station-Keeping System, 2017-2032 (USD Thousand) 259
Table 370. China Cable Laying Vessel Market Size, by Onboard Power Architecture, 2017-2032 (USD Thousand) 259
Table 371. China Cable Laying Vessel Market Size, by Infrastructure Application, 2017-2032 (USD Thousand) 260
Table 372. China Cable Laying Vessel Market Size, by Vessel Buyer, 2017-2032 (USD Thousand) 260
Table 373. China Cable Laying Vessel Market Size, by Construction Pathway, 2017-2032 (USD Thousand) 260
Table 374. China Cable Laying Vessel Market Size, by Operating Envelope, 2017-2032 (USD Thousand) 261
Table 375. China Cable Laying Vessel Market Size, by Procurement Structure, 2017-2032 (USD Thousand) 261
Table 376. China Cable Laying Vessel Market Size, by Cable Payload Capacity, 2017-2032 (USD Thousand) 261
Table 377. China Cable Laying Vessel Market Size, by Cable-Laying Depth Capability, 2017-2032 (USD Thousand) 261
Table 378. France Cable Laying Vessel Market Size, 2017-2032 (USD Thousand) 262
Table 379. France Cable Laying Vessel Market Size, by Vessel Platform, 2017-2032 (USD Thousand) 262
Table 380. France Cable Laying Vessel Market Size, by Mission Configuration, 2017-2032 (USD Thousand) 262
Table 381. France Cable Laying Vessel Market Size, by Cable Compatibility, 2017-2032 (USD Thousand) 262
Table 382. France Cable Laying Vessel Market Size, by Station-Keeping System, 2017-2032 (USD Thousand) 263
Table 383. France Cable Laying Vessel Market Size, by Onboard Power Architecture, 2017-2032 (USD Thousand) 263
Table 384. France Cable Laying Vessel Market Size, by Infrastructure Application, 2017-2032 (USD Thousand) 264
Table 385. France Cable Laying Vessel Market Size, by Vessel Buyer, 2017-2032 (USD Thousand) 264
Table 386. France Cable Laying Vessel Market Size, by Construction Pathway, 2017-2032 (USD Thousand) 264
Table 387. France Cable Laying Vessel Market Size, by Operating Envelope, 2017-2032 (USD Thousand) 265
Table 388. France Cable Laying Vessel Market Size, by Procurement Structure, 2017-2032 (USD Thousand) 265
Table 389. France Cable Laying Vessel Market Size, by Cable Payload Capacity, 2017-2032 (USD Thousand) 265

Table 390. France Cable Laying Vessel Market Size, by Cable-Laying Depth Capability, 2017-2032 (USD Thousand) 265
Table 391. United States Cable Laying Vessel Market Size, 2017-2032 (USD Thousand) 266
Table 392. United States Cable Laying Vessel Market Size, by Vessel Platform, 2017-2032 (USD Thousand) 266
Table 393. United States Cable Laying Vessel Market Size, by Mission Configuration, 2017-2032 (USD Thousand) 266
Table 394. United States Cable Laying Vessel Market Size, by Cable Compatibility, 2017-2032 (USD Thousand) 266
Table 395. United States Cable Laying Vessel Market Size, by Station-Keeping System, 2017-2032 (USD Thousand) 267
Table 396. United States Cable Laying Vessel Market Size, by Onboard Power Architecture, 2017-2032 (USD Thousand) 267
Table 397. United States Cable Laying Vessel Market Size, by Infrastructure Application, 2017-2032 (USD Thousand) 268
Table 398. United States Cable Laying Vessel Market Size, by Vessel Buyer, 2017-2032 (USD Thousand) 268
Table 399. United States Cable Laying Vessel Market Size, by Construction Pathway, 2017-2032 (USD Thousand) 268
Table 400. United States Cable Laying Vessel Market Size, by Operating Envelope, 2017-2032 (USD Thousand) 269
Table 401. United States Cable Laying Vessel Market Size, by Procurement Structure, 2017-2032 (USD Thousand) 269
Table 402. United States Cable Laying Vessel Market Size, by Cable Payload Capacity, 2017-2032 (USD Thousand) 269
Table 403. United States Cable Laying Vessel Market Size, by Cable-Laying Depth Capability, 2017-2032 (USD Thousand) 269
Table 404. South Korea Cable Laying Vessel Market Size, 2017-2032 (USD Thousand) 270
Table 405. South Korea Cable Laying Vessel Market Size, by Vessel Platform, 2017-2032 (USD Thousand) 270
Table 406. South Korea Cable Laying Vessel Market Size, by Mission Configuration, 2017-2032 (USD Thousand) 270
Table 407. South Korea Cable Laying Vessel Market Size, by Cable Compatibility, 2017-2032 (USD Thousand) 270
Table 408. South Korea Cable Laying Vessel Market Size, by Station-Keeping System, 2017-2032 (USD Thousand) 271
Table 409. South Korea Cable Laying Vessel Market Size, by Onboard Power Architecture, 2017-2032 (USD Thousand) 271
Table 410. South Korea Cable Laying Vessel Market Size, by Infrastructure Application, 2017-2032 (USD Thousand) 272
Table 411. South Korea Cable Laying Vessel Market Size, by Vessel Buyer, 2017-2032 (USD Thousand) 272
Table 412. South Korea Cable Laying Vessel Market Size, by Construction Pathway, 2017-2032 (USD Thousand) 272

Table 413. South Korea Cable Laying Vessel Market Size, by Operating Envelope, 2017-2032 (USD Thousand) 273
Table 414. South Korea Cable Laying Vessel Market Size, by Procurement Structure, 2017-2032 (USD Thousand) 273
Table 415. South Korea Cable Laying Vessel Market Size, by Cable Payload Capacity, 2017-2032 (USD Thousand) 273
Table 416. South Korea Cable Laying Vessel Market Size, by Cable-Laying Depth Capability, 2017-2032 (USD Thousand) 273
Table 417. Canada Cable Laying Vessel Market Size, 2017-2032 (USD Thousand) 274
Table 418. Canada Cable Laying Vessel Market Size, by Vessel Platform, 2017-2032 (USD Thousand) 274
Table 419. Canada Cable Laying Vessel Market Size, by Mission Configuration, 2017-2032 (USD Thousand) 274
Table 420. Canada Cable Laying Vessel Market Size, by Cable Compatibility, 2017-2032 (USD Thousand) 274
Table 421. Canada Cable Laying Vessel Market Size, by Station-Keeping System, 2017-2032 (USD Thousand) 275
Table 422. Canada Cable Laying Vessel Market Size, by Onboard Power Architecture, 2017-2032 (USD Thousand) 275
Table 423. Canada Cable Laying Vessel Market Size, by Infrastructure Application, 2017-2032 (USD Thousand) 276
Table 424. Canada Cable Laying Vessel Market Size, by Vessel Buyer, 2017-2032 (USD Thousand) 276
Table 425. Canada Cable Laying Vessel Market Size, by Construction Pathway, 2017-2032 (USD Thousand) 276
Table 426. Canada Cable Laying Vessel Market Size, by Operating Envelope, 2017-2032 (USD Thousand) 277
Table 427. Canada Cable Laying Vessel Market Size, by Procurement Structure, 2017-2032 (USD Thousand) 277
Table 428. Canada Cable Laying Vessel Market Size, by Cable Payload Capacity, 2017-2032 (USD Thousand) 277
Table 429. Canada Cable Laying Vessel Market Size, by Cable-Laying Depth Capability, 2017-2032 (USD Thousand) 277
Table 430. United Kingdom Cable Laying Vessel Market Size, 2017-2032 (USD Thousand) 278
Table 431. United Kingdom Cable Laying Vessel Market Size, by Vessel Platform, 2017-2032 (USD Thousand) 278
Table 432. United Kingdom Cable Laying Vessel Market Size, by Mission Configuration, 2017-2032 (USD Thousand) 278
Table 433. United Kingdom Cable Laying Vessel Market Size, by Cable Compatibility, 2017-2032 (USD Thousand) 278
Table 434. United Kingdom Cable Laying Vessel Market Size, by Station-Keeping System, 2017-2032 (USD Thousand) 279
Table 435. United Kingdom Cable Laying Vessel Market Size, by Onboard Power Architecture, 2017-2032 (USD Thousand) 279

Table 436. United Kingdom Cable Laying Vessel Market Size, by Infrastructure Application, 2017-2032 (USD Thousand) 280
Table 437. United Kingdom Cable Laying Vessel Market Size, by Vessel Buyer, 2017-2032 (USD Thousand) 280
Table 438. United Kingdom Cable Laying Vessel Market Size, by Construction Pathway, 2017-2032 (USD Thousand) 280
Table 439. United Kingdom Cable Laying Vessel Market Size, by Operating Envelope, 2017-2032 (USD Thousand) 281
Table 440. United Kingdom Cable Laying Vessel Market Size, by Procurement Structure, 2017-2032 (USD Thousand) 281
Table 441. United Kingdom Cable Laying Vessel Market Size, by Cable Payload Capacity, 2017-2032 (USD Thousand) 281
Table 442. United Kingdom Cable Laying Vessel Market Size, by Cable-Laying Depth Capability, 2017-2032 (USD Thousand) 281
Table 443. Germany Cable Laying Vessel Market Size, 2017-2032 (USD Thousand) 282
Table 444. Germany Cable Laying Vessel Market Size, by Vessel Platform, 2017-2032 (USD Thousand) 282
Table 445. Germany Cable Laying Vessel Market Size, by Mission Configuration, 2017-2032 (USD Thousand) 282
Table 446. Germany Cable Laying Vessel Market Size, by Cable Compatibility, 2017-2032 (USD Thousand) 282
Table 447. Germany Cable Laying Vessel Market Size, by Station-Keeping System, 2017-2032 (USD Thousand) 283
Table 448. Germany Cable Laying Vessel Market Size, by Onboard Power Architecture, 2017-2032 (USD Thousand) 283
Table 449. Germany Cable Laying Vessel Market Size, by Infrastructure Application, 2017-2032 (USD Thousand) 284
Table 450. Germany Cable Laying Vessel Market Size, by Vessel Buyer, 2017-2032 (USD Thousand) 284
Table 451. Germany Cable Laying Vessel Market Size, by Construction Pathway, 2017-2032 (USD Thousand) 284
Table 452. Germany Cable Laying Vessel Market Size, by Operating Envelope, 2017-2032 (USD Thousand) 285
Table 453. Germany Cable Laying Vessel Market Size, by Procurement Structure, 2017-2032 (USD Thousand) 285
Table 454. Germany Cable Laying Vessel Market Size, by Cable Payload Capacity, 2017-2032 (USD Thousand) 285
Table 455. Germany Cable Laying Vessel Market Size, by Cable-Laying Depth Capability, 2017-2032 (USD Thousand) 285
Table 456. India Cable Laying Vessel Market Size, 2017-2032 (USD Thousand) 286
Table 457. India Cable Laying Vessel Market Size, by Vessel Platform, 2017-2032 (USD Thousand) 286
Table 458. India Cable Laying Vessel Market Size, by Mission Configuration, 2017-2032 (USD Thousand) 286

Table 459. India Cable Laying Vessel Market Size, by Cable Compatibility, 2017-2032 (USD Thousand) 286
Table 460. India Cable Laying Vessel Market Size, by Station-Keeping System, 2017-2032 (USD Thousand) 287
Table 461. India Cable Laying Vessel Market Size, by Onboard Power Architecture, 2017-2032 (USD Thousand) 287
Table 462. India Cable Laying Vessel Market Size, by Infrastructure Application, 2017-2032 (USD Thousand) 288
Table 463. India Cable Laying Vessel Market Size, by Vessel Buyer, 2017-2032 (USD Thousand) 288
Table 464. India Cable Laying Vessel Market Size, by Construction Pathway, 2017-2032 (USD Thousand) 288
Table 465. India Cable Laying Vessel Market Size, by Operating Envelope, 2017-2032 (USD Thousand) 289
Table 466. India Cable Laying Vessel Market Size, by Procurement Structure, 2017-2032 (USD Thousand) 289
Table 467. India Cable Laying Vessel Market Size, by Cable Payload Capacity, 2017-2032 (USD Thousand) 289
Table 468. India Cable Laying Vessel Market Size, by Cable-Laying Depth Capability, 2017-2032 (USD Thousand) 289
Table 469. Russia Cable Laying Vessel Market Size, 2017-2032 (USD Thousand) 290
Table 470. Russia Cable Laying Vessel Market Size, by Vessel Platform, 2017-2032 (USD Thousand) 290
Table 471. Russia Cable Laying Vessel Market Size, by Mission Configuration, 2017-2032 (USD Thousand) 290
Table 472. Russia Cable Laying Vessel Market Size, by Cable Compatibility, 2017-2032 (USD Thousand) 290
Table 473. Russia Cable Laying Vessel Market Size, by Station-Keeping System, 2017-2032 (USD Thousand) 291
Table 474. Russia Cable Laying Vessel Market Size, by Onboard Power Architecture, 2017-2032 (USD Thousand) 291
Table 475. Russia Cable Laying Vessel Market Size, by Infrastructure Application, 2017-2032 (USD Thousand) 292
Table 476. Russia Cable Laying Vessel Market Size, by Vessel Buyer, 2017-2032 (USD Thousand) 292
Table 477. Russia Cable Laying Vessel Market Size, by Construction Pathway, 2017-2032 (USD Thousand) 292
Table 478. Russia Cable Laying Vessel Market Size, by Operating Envelope, 2017-2032 (USD Thousand) 293
Table 479. Russia Cable Laying Vessel Market Size, by Procurement Structure, 2017-2032 (USD Thousand) 293
Table 480. Russia Cable Laying Vessel Market Size, by Cable Payload Capacity, 2017-2032 (USD Thousand) 293
Table 481. Russia Cable Laying Vessel Market Size, by Cable-Laying Depth Capability, 2017-2032 (USD Thousand) 293

Table 482. Australia Cable Laying Vessel Market Size, 2017-2032 (USD Thousand) 294
Table 483. Australia Cable Laying Vessel Market Size, by Vessel Platform, 2017-2032 (USD Thousand) 294
Table 484. Australia Cable Laying Vessel Market Size, by Mission Configuration, 2017-2032 (USD Thousand) 294
Table 485. Australia Cable Laying Vessel Market Size, by Cable Compatibility, 2017-2032 (USD Thousand) 294
Table 486. Australia Cable Laying Vessel Market Size, by Station-Keeping System, 2017-2032 (USD Thousand) 295
Table 487. Australia Cable Laying Vessel Market Size, by Onboard Power Architecture, 2017-2032 (USD Thousand) 295
Table 488. Australia Cable Laying Vessel Market Size, by Infrastructure Application, 2017-2032 (USD Thousand) 296
Table 489. Australia Cable Laying Vessel Market Size, by Vessel Buyer, 2017-2032 (USD Thousand) 296
Table 490. Australia Cable Laying Vessel Market Size, by Construction Pathway, 2017-2032 (USD Thousand) 296
Table 491. Australia Cable Laying Vessel Market Size, by Operating Envelope, 2017-2032 (USD Thousand) 297
Table 492. Australia Cable Laying Vessel Market Size, by Procurement Structure, 2017-2032 (USD Thousand) 297
Table 493. Australia Cable Laying Vessel Market Size, by Cable Payload Capacity, 2017-2032 (USD Thousand) 297
Table 494. Australia Cable Laying Vessel Market Size, by Cable-Laying Depth Capability, 2017-2032 (USD Thousand) 297
Table 495. Brazil Cable Laying Vessel Market Size, 2017-2032 (USD Thousand) 298
Table 496. Brazil Cable Laying Vessel Market Size, by Vessel Platform, 2017-2032 (USD Thousand) 298
Table 497. Brazil Cable Laying Vessel Market Size, by Mission Configuration, 2017-2032 (USD Thousand) 298
Table 498. Brazil Cable Laying Vessel Market Size, by Cable Compatibility, 2017-2032 (USD Thousand) 298
Table 499. Brazil Cable Laying Vessel Market Size, by Station-Keeping System, 2017-2032 (USD Thousand) 299
Table 500. Brazil Cable Laying Vessel Market Size, by Onboard Power Architecture, 2017-2032 (USD Thousand) 299
Table 501. Brazil Cable Laying Vessel Market Size, by Infrastructure Application, 2017-2032 (USD Thousand) 300
Table 502. Brazil Cable Laying Vessel Market Size, by Vessel Buyer, 2017-2032 (USD Thousand) 300
Table 503. Brazil Cable Laying Vessel Market Size, by Construction Pathway, 2017-2032 (USD Thousand) 300
Table 504. Brazil Cable Laying Vessel Market Size, by Operating Envelope, 2017-2032 (USD Thousand) 301

Table 505. Brazil Cable Laying Vessel Market Size, by Procurement Structure, 2017-2032 (USD Thousand) 301
Table 506. Brazil Cable Laying Vessel Market Size, by Cable Payload Capacity, 2017-2032 (USD Thousand) 301
Table 507. Brazil Cable Laying Vessel Market Size, by Cable-Laying Depth Capability, 2017-2032 (USD Thousand) 301
Table 508. Spain Cable Laying Vessel Market Size, 2017-2032 (USD Thousand) 302
Table 509. Spain Cable Laying Vessel Market Size, by Vessel Platform, 2017-2032 (USD Thousand) 302
Table 510. Spain Cable Laying Vessel Market Size, by Mission Configuration, 2017-2032 (USD Thousand) 302
Table 511. Spain Cable Laying Vessel Market Size, by Cable Compatibility, 2017-2032 (USD Thousand) 302
Table 512. Spain Cable Laying Vessel Market Size, by Station-Keeping System, 2017-2032 (USD Thousand) 303
Table 513. Spain Cable Laying Vessel Market Size, by Onboard Power Architecture, 2017-2032 (USD Thousand) 303
Table 514. Spain Cable Laying Vessel Market Size, by Infrastructure Application, 2017-2032 (USD Thousand) 304
Table 515. Spain Cable Laying Vessel Market Size, by Vessel Buyer, 2017-2032 (USD Thousand) 304
Table 516. Spain Cable Laying Vessel Market Size, by Construction Pathway, 2017-2032 (USD Thousand) 304
Table 517. Spain Cable Laying Vessel Market Size, by Operating Envelope, 2017-2032 (USD Thousand) 305
Table 518. Spain Cable Laying Vessel Market Size, by Procurement Structure, 2017-2032 (USD Thousand) 305
Table 519. Spain Cable Laying Vessel Market Size, by Cable Payload Capacity, 2017-2032 (USD Thousand) 305
Table 520. Spain Cable Laying Vessel Market Size, by Cable-Laying Depth Capability, 2017-2032 (USD Thousand) 305
Table 521. Mexico Cable Laying Vessel Market Size, 2017-2032 (USD Thousand) 306
Table 522. Mexico Cable Laying Vessel Market Size, by Vessel Platform, 2017-2032 (USD Thousand) 306
Table 523. Mexico Cable Laying Vessel Market Size, by Mission Configuration, 2017-2032 (USD Thousand) 306
Table 524. Mexico Cable Laying Vessel Market Size, by Cable Compatibility, 2017-2032 (USD Thousand) 306
Table 525. Mexico Cable Laying Vessel Market Size, by Station-Keeping System, 2017-2032 (USD Thousand) 307
Table 526. Mexico Cable Laying Vessel Market Size, by Onboard Power Architecture, 2017-2032 (USD Thousand) 307
Table 527. Mexico Cable Laying Vessel Market Size, by Infrastructure Application, 2017-2032 (USD Thousand) 308

Table 528. Mexico Cable Laying Vessel Market Size, by Vessel Buyer, 2017-2032 (USD Thousand) 308
Table 529. Mexico Cable Laying Vessel Market Size, by Construction Pathway, 2017-2032 (USD Thousand) 308
Table 530. Mexico Cable Laying Vessel Market Size, by Operating Envelope, 2017-2032 (USD Thousand) 309
Table 531. Mexico Cable Laying Vessel Market Size, by Procurement Structure, 2017-2032 (USD Thousand) 309
Table 532. Mexico Cable Laying Vessel Market Size, by Cable Payload Capacity, 2017-2032 (USD Thousand) 309
Table 533. Mexico Cable Laying Vessel Market Size, by Cable-Laying Depth Capability, 2017-2032 (USD Thousand) 309
Table 534. Global Cable Laying Vessel Market Share, by Key Player, 2025 311
Table 535. Global Cable Laying Vessel Market, Companies Covered 441
Table 536. Global Cable Laying Vessel Market, Key Experts 447

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