

GCCM

M A G A Z I N E

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Carrier
Community
GLOBAL TELECOM CLUB

**THE COMPETITIVE
ADVANTAGE OF
CURIOSITY. HOW
AI IS RESHAPING
JOBS, SKILLS
AND CAREERS
— AND WHY
THIS CREATES
OPPORTUNITY,
NOT RISK**

BY SANDER BARENS,
FOUNDER & CEO, CAPVION

**POWERING GLOBAL
CONNECTIVITY.
THE EVOLVING
ECOSYSTEM OF
SUSTAINABLE DATA
CENTERS AND
SUBSEA CABLES**

BY EMMANUEL BECKER, CEO,
MEDITERRA DATACENTERS

CC-EXECUTIVE INTERVIEW WITH

**ENRICO
BAGNASCO**

Chief Executive Officer at Sparkle



Instantly Everywhere Always Connected



SMS Fraud Prevention

Block grey routes and maximize legitimate traffic



eSIM Management & Orchestration

Provision, launch and scale new connectivity services to unlock revenue streams



White-label Communication API

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Monetize traffic with analytics, smart routing & flexible billing



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Reach customers in 190+ countries with carrier-grade reliability.



Collaborating Today, Leading to Transform Tomorrow



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Since its launch in 2022, the CC-Leaders Club (CCL), powered by Carrier Community, has emerged as an elite platform uniting C-level executives and top decision-makers from the global telecommunications industry.

CCL Club members gain exclusive access to:

- VIP Invitations to prestigious summits and forums held annually in Berlin and Muscat.
- Elite Networking Opportunities to collaborate and shape the future of telecommunications.
- Exclusive Discussions to share insights, innovate, and drive strategic growth.
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PANEL DISCUSSION

The role of the AI, NaaS
& Cybersecurity in the
digital transformation era
today and tomorrow



EDITOR'S LETTER

Dear Valued GCCM
Magazine Readers,

Welcome to Issue 92 of
GCCM Magazine.

The global telecom ecosystem is being shaped by more than technology alone. Strategic infrastructure decisions, changing customer expectations, new approaches to skills and innovation, and the growing importance of regional digital hubs are all influencing where the industry goes next. In this edition, we bring together perspectives from leaders addressing these developments from different angles, from international connectivity and data center expansion to AI, open innovation, and the changing world of work.

On the cover of this issue, we are proud to feature **Enrico Bagnasco, Chief Executive Officer at Sparkle**, in our latest CC-Executive Interview. With major infrastructure projects progressing across multiple regions and demand for resilient international networks continuing to grow, Sparkle is strengthening its global connectivity footprint while expanding its portfolio of digital services. In conversation with Wida Schmidt, CEO of Carrier Community, Enrico discusses the company's latest developments, strategic priorities, and the technologies and services shaping its future direction.

This issue also features a keynote article based on the presentation delivered by **Sander Barens, Founder and CEO of Capvion**, during the Disruptive & Transformation session at Europe 2026 GCCM in Berlin. Sander examines how artificial intelligence is changing the way people work, learn, and develop their careers.

Rather than viewing AI primarily as a threat to employment, he focuses on the opportunities it creates for those willing to remain curious, understand their customers, and continuously adapt their skills to a changing business environment.

We also turn our attention to the data center landscape with a keynote article from **Emmanuel Becker, CEO of Mediterra Datacenters**, based on his presentation at the SIS 2026 Summit in Lisbon. Looking at the wider forces influencing the sector, including geopolitics, energy markets, regulation, and subsea connectivity, Emmanuel explores why Southern Europe is entering a new stage of digital infrastructure development and how its position can support growing connectivity between Europe, Africa, the Middle East, and other international markets.

Beyond these highlights, Issue 92 brings you further keynote and panel discussion articles, expert perspectives, and industry updates from across the global telecom and ICT community, offering a broader look at the ideas, challenges, and opportunities currently shaping the sector.

Thank you for continuing to follow GCCM Magazine and for being part of the Carrier Community network. We hope the perspectives shared throughout this edition provide valuable insights and keep you connected with the conversations taking place across our industry.

Warm regards,

Wida Schmidt
CEO, Carrier Community


ABOUT CARRIER
COMMUNITY

Founded in 2008, Carrier Community is a global telecom club and industry platform for wholesale service providers across Voice, Data, SMS, Mobile, Data Centers, VAS, MVNO, ISP, Subsea Cable, Telehouse, and related sectors. The community includes 8,500+ qualified members from 2,300+ operators in over 130 countries, holding C-level, VP, Director, and Manager positions across incumbent, mobile, alternative, and smaller operators.

Carrier Community provides a space for members to share ideas, contacts, and business insights, access industry news, publish articles, promote their companies, and attend global members' conferences.

Visit our members' portals to learn more.

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Carrier Community (CC), the global telecom club founded in 2008, successfully hosted its **9th annual CIS 2026 Global Carrier Connectivity Meeting (GCCM)** in Almaty from **September 2nd to 4th, 2026**. The gathering welcomed **400+ CC members and partners**, including decision-makers from Tier-1, Tier-2, and Tier-3 companies representing more than **36 countries**.

The CIS 2026 GCCM provided a

focused business platform for the regional and international telecom community to connect, exchange ideas, and explore new opportunities across wholesale connectivity, data, messaging, mobile, fixed networks, OTT, VAS, cable, satellite, and data centers. Throughout the event, participants took part in one-on-one meetings, executive discussions, knowledge-sharing sessions, and networking activities, while exploring the latest technology developments

and connectivity solutions.

CC extends its sincere appreciation to **TNS Global**, whose support as **Host Diamond Sponsor** played an important role in the success of this year's gathering. Our thanks also go to **Kazakhtelecom JSC** and **Transtelecom**, who supported the event as **Platinum Sponsors**.

The Almaty edition once again demonstrated the growing importance of Central Asia within the international connectivity



landscape, bringing regional operators together with global carriers and technology partners to exchange perspectives, develop new business relationships, and discuss the opportunities shaping the next phase of digital infrastructure and telecom development.

We also greatly appreciate the support of our Gold Sponsors **China Telecom International, Brilliant Telecom, LANCK Telecom, Acepeak, NTEC,**

and **Huawei**; Silver Sponsors **Itnio Tech, Türk Telekom International, BTS, China Unicom, Rostelecom, gms and Uztelecom**; Associate Sponsors **beeline, ritorica, Astral, telegraph, V-net, Beltelecom** and **Sparkle**; and Official Exhibitors **Alaris Labs, IXTelecom, Europeer Xchange, GlobalNet/DATAIX, New Telco, Comfortel** and **Jusan Mobile**.

The strong participation and continued support of the CC

ecosystem contributed to another successful CIS GCCM edition and further strengthened connections between the Central Asian and international telecom markets.

For further information about Carrier Community, upcoming events, or partnership opportunities, please contact info@carriercommunity.com.



CC-Executive Interview with **ENRICO BAGNASCO** Chief Executive Officer at Sparkle



With major infrastructure projects progressing across multiple regions and demand for resilient international networks continuing to grow, Sparkle remains focused on strengthening global connectivity while expanding its portfolio of digital services. In this CC-Executive Interview, Wida Schmidt, CEO of Carrier Community, speaks with Enrico

Bagnasco, Chief Executive Officer at Sparkle, about the company's latest developments, strategic priorities, and the innovations shaping its future.

Wida Schmidt:

Enrico, welcome back to our annual CC-Executive Interview. Since our last conversation, Sparkle has continued to advance several major infrastructure

projects while introducing new innovations across AI, secure communications, and global connectivity. Thank you for joining us again to share the latest updates.

Enrico Bagnasco:

Thank you, Wida. It is always nice to be back with Carrier Community.



"LOOKING BACK OVER THE PAST TWELVE MONTHS, WE HAVE MADE **SUBSTANTIAL PROGRESS ACROSS ALL THREE PROJECTS.**"

spoke almost twelve months ago, Sparkle has continued advancing several major infrastructure projects. Which developments are you most excited about today, and why?

Enrico Bagnasco:

Infrastructure development remains the cornerstone of Sparkle's long-term strategy, and over the past year we have achieved significant progress across our three major projects.

The most important milestone has certainly been the completion of the Mediterranean segment of the Blue Raman system. We successfully finalized all cable landings, and since November last year we have a new commercial route operating from Aqaba to Milan and Marseille, providing a completely new and diversified connection between the Middle East and Europe through Italy. This has been a major achievement and one that has been very well received by the market.

Our MANTA project is also progressing according to plan. Connecting directly Mexico, Florida, Panama and Colombia, MANTA will introduce an important new route across the Gulf of Mexico.

GreenMed has also moved from planning into execution. Earlier this year we have signed the contract with our supplier and the project is now fully underway. GreenMed will establish a completely new route connecting the Middle East and the Levant directly with Milan through the Adriatic Sea. Besides creating a shorter path than existing routes around Sicily or the Tyrrhenian Sea, it positions itself as a strategic express corridor

linking the expanding digital infrastructure in the Middle East with the heart of Europe.

Looking back over the past twelve months, we have made substantial progress across all three projects.

Wida Schmidt:

Congratulations once again on these important milestones. Last year you highlighted resilience and route diversity as key priorities. How have these translated into tangible benefits for customers over the past year?

Enrico Bagnasco:

It is becoming increasingly clear that future networks are not simply about adding capacity. They are about building resilience.

There are several reasons for this. The first is the enormous demand for additional bandwidth. Since our previous interview, AI has become by far the strongest driver of network development, and AI requires tremendous amounts of connectivity.

The second factor is the geopolitical environment. We have seen continued challenges around Bab el-Mandeb, the Strait of Hormuz, and other strategically important regions. These events demonstrate that resilience cannot be achieved simply by adding more capacity to existing routes.

The answer is to create new routes.

Today, customers invest in new infrastructure not only because they need greater bandwidth, but because they need greater resilience. They want multiple providers and diversified routes to safeguard their connectivity. I believe this will continue to

Wida Schmidt:

Likewise, and we are delighted to have you with us again. Before we begin today's interview, on behalf of the entire CC team, I would like to thank you and the whole Sparkle team for your continued partnership and support over the past ten years, as well as congratulate you on your recent CC-Global Awards and achievements.

Enrico Bagnasco:

Thank you very much. We truly appreciate it. These awards represent valuable recognition of the innovation we continue to bring to our services, particularly around AI-secure communications. We are very grateful for this acknowledgement.

Wida Schmidt:

Let's begin with our first question. Since we last

be one of the strongest drivers behind future infrastructure investments.

Wida Schmidt:

It is fascinating to see how something largely invisible to end users, such as route diversity, can have such an important impact. How do you ensure that growing demand for global bandwidth is matched with both capacity and resilience?

Enrico Bagnasco:

As we continue opening new routes, I believe we will increasingly see hybrid network architectures, combining long submarine cable segments with shorter terrestrial connections.

Capacity remains essential. Resilience remains essential. But so does latency.

Many new AI applications require lower round-trip delays, making these hybrid terrestrial and submarine architectures the natural evolution of global networks. We already see this trend becoming more common.

Wida Schmidt:

AI, as you mentioned, is now becoming deeply embedded throughout telecom networks, including Sparkle's own infrastructure. Where do you see AI having the greatest impact today in terms of efficiency, performance, and customer experience?

Enrico Bagnasco:

Today, AI is undoubtedly the single biggest driver of network evolution.

For many years we experienced fairly predictable traffic growth. Data volumes doubled approximately every three years as more users came online, access speeds increased through FTTH and 5G, and services evolved from standard definition to HD, 4K and 8K video. It was steady, linear growth.

AI changes the situation completely.

Large Language Models require enormous amounts of data during training, moving huge datasets into data centres. But the even more interesting phase is inference, where AI systems continuously access information from virtually every possible domain, whether biology, economics, history or physics. The data needed can originate anywhere in the world.

This fundamentally changes network topology.

Historically, we built networks around

where people lived. Today, we increasingly build networks around where AI data centres are located, even if those facilities are far from traditional population centres. We are no longer connecting only people. We are connecting AI nodes.

As a rule of thumb, every megawatt of AI computing capacity requires approximately 30 to 50 terabits per second of international connectivity. Since AI workloads depend on globally distributed datasets, international connectivity becomes even more important.

Understanding these changes and staying ahead of them is creating an entirely new way of designing networks.

Sparkle is approaching this from multiple angles. Naturally, we continue expanding infrastructure, but we are also developing entirely new services. One of the newest developments is around Agentic AI. AI agents increasingly need to communicate with each other autonomously, making secure connectivity between these agents absolutely essential.

To support this, we have developed our patent-pending STLS AI protocol, which we believe represents an important advancement. This innovation was recognised during the recent Berlin event, where Sparkle received awards for Best AI Project of the Year and Best Disruptive Solution.

Alongside these developments, we continue expanding our quantum-safe solutions to protect both connectivity and data.

AI is reshaping our industry from every perspective. It requires significantly more capacity, introduces entirely new network topologies, and raises security requirements to an entirely new level. For carriers, this represents both a tremendous opportunity and a significant challenge.

Wida Schmidt:

It is remarkable to see how AI is reshaping network architecture, often before most people even notice these changes. Congratulations once again on your awards and on the continued innovation within Sparkle.

As services such as cloud, IoT connectivity and secure networking continue to expand, how is the role of an operator like Sparkle evolving within today's digital ecosystem?

Enrico Bagnasco:

Network-as-a-Service has become

fundamental for enabling rapid service activation, automated provisioning, dynamic reconfiguration and intelligent capacity protection.

Everything surrounding automation and NaaS is becoming increasingly important.

At Sparkle, we continue driving network evolution and service automation through collaboration with industry organisations such as Mplify and the Global Leaders' Forum, contributing to technical specifications while also encouraging practical implementation.

Today, the technology is largely available. The specifications exist. What we now need is broader industry adoption.

The next step for carriers is fully embracing automated service delivery and translating these technologies into commercially available industrial solutions.

OTT players have transformed many aspects of digital services, but when it comes to global connectivity, this remains the carrier community's responsibility. NaaS provides the right framework for us to continue playing this essential role.

Wida Schmidt:

Sparkle, and operators in general, are increasingly becoming digital platforms and service enablers rather than simply connectivity providers.

If we meet again in twelve months, which milestones would you most like to share with us?

Enrico Bagnasco:

There are many.

At the top of my list is completing Blue Raman end-to-end. The western segment from Aqaba to Milan and Marseille is already operational, while the eastern section connecting India and Oman is complete as well. What remains are the Saudi Arabian waters together with Bab el-Mandeb and Yemeni waters.

I very much hope that when we meet again next year, I will be able to say the entire system is operational. We already have many customers waiting to activate services once the full route is complete.

For MANTA, I expect the first cable landings to be completed within the next twelve months.

Regarding GreenMed the ship is out and the route survey is being completed shortly, so the project is proceeding at full speed in parallel on all permitting,

"I AM EQUALLY EAGER TO SEE BROAD INDUSTRY ADOPTION OF API-BASED NAAS SERVICES FOR IP AND NETWORKING SOLUTIONS AS WELL AS FOR AI AGENTS INTERCONNECTIONS."

manufacturing and CLS building tasks. I am confident that cable laying will be well underway in a year's time.

Beyond infrastructure, I am equally eager to see broad industry adoption of API-based NaaS services for IP and networking solutions as well as for AI agents interconnections. We already have the technical specifications, the products and the solutions. What remains is making the business decisions necessary to implement them at scale.

I believe these developments are fundamental to the continued evolution of the carrier community. This is a role that only carriers can fulfil, and if we execute it well, the market will recognise its value.

Wida Schmidt:

Enrico, thank you once again for sharing these valuable insights. It is always a pleasure to hear about Sparkle's continued progress and long-term vision. On behalf of the entire Carrier Community team, we wish you and your colleagues continued success, and we look forward to following the next milestones in Sparkle's journey.

Enrico Bagnasco:

Thank you, Wida. It has been a pleasure. I look forward to sharing further updates as these projects continue to progress.



*Interview by Wida Schmidt
CEO, Carrier Community*

Watch the video version of this CC-Executive Interview on our CC-Media Portal:
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All transcribed content is subjected to a regular editing process.



POWERING GLOBAL CONNECTIVITY

**The evolving ecosystem of sustainable
Data Centers and subsea cables**

EMMANUEL BECKER

CEO,
Mediterra
DataCenters

At the SIS 2026 Summit in Lisbon, Emmanuel Becker, CEO of Mediterra DataCenters, examined how geopolitical shifts, energy markets, regulation, and subsea connectivity are reshaping the data center industry. Looking beyond Mediterra's own development plans, he argued that Southern Europe is entering a new stage of digital infrastructure growth, driven not only by regional demand, but by its position as a gateway to surrounding markets across Africa, the Middle East, and beyond.

Geopolitics, Energy and Regulation Are Reshaping the Industry

What I want to speak about today is not only what we are doing at Mediterra DataCenters. I want to look at the wider market and at the forces that are shaping our industry.

One thing that is becoming increasingly clear is that geopolitics has more and more impact on our lives, on our work, and certainly on the digital infrastructure industry. Every geopolitical development that affects energy, regulation, or investment conditions has a direct effect on our sector. The reason is simple: digital infrastructure is connected to everything.

It is not only because data centers consume energy. It is also because every change in energy prices, every new regulation, and every new decision by political or industry leaders can change the way we plan, build, and operate. Sometimes these changes are negative, but sometimes they accelerate the market. COVID, for example, had many difficult consequences, but it also accelerated digital demand and created new needs that the industry had to address quickly.

Cybersecurity events, energy shocks, or regulatory shifts force us to rethink not only where we deploy infrastructure, but how we design and manage it. Ten years ago, I do not remember data center operators saying that their number one priority was access to energy or energy efficiency. Of course, we looked at energy efficiency, but not with the intensity we do today. Now it is central to every discussion.

Energy pricing has a clear impact, but I want to challenge one common assumption. It is not true that high energy prices automatically stop data center investment. If that were the case, there would have been no major investment in France in 2022, and investment in Italy would have stopped as well. Instead, 2022 became one of the strongest years for digital infrastructure investment in both markets.

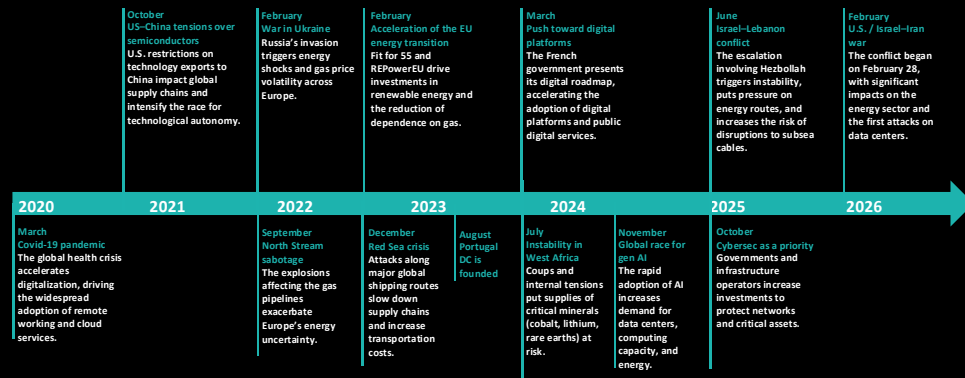
So yes, energy prices matter. They affect us, and they affect our customers. But they do not stop the market. They change the shape of strategy. They influence technology choices, deployment models, pricing, and geography. Ultimately, some of that cost is passed through the value chain, and in



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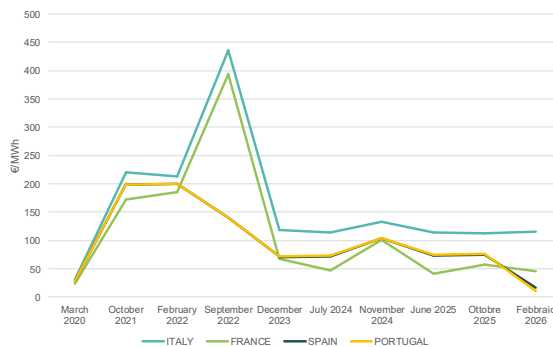


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Source Italy: Report ARERA
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Sustaining the Digital World

The same is true for recent geopolitical developments. We may see energy volatility, and we may see new pressure points, but data centers are long-term investments. They are built for 20 to 30 years. A short-term shock may change some assumptions, but it does not necessarily cancel the business case.

For me, the bigger long-term challenge is not energy. It is regulation.

We have seen more regulation in the last twelve months than in the previous five years. This is happening because the data center industry has become much more visible. We are investing large amounts of money, consuming significant resources, and becoming central to national

digital strategies. As soon as an industry becomes visible, it attracts regulation.

That regulation will become more complex. We need to be prepared for that.

Territorial Integration Is the Next Challenge

The second major issue is territorial integration. Today, most digital infrastructure investment in Europe remains concentrated in a limited number of cities. Across the European Union, a very large share of data center investment is still concentrated in perhaps seven to ten major locations.

But can seven to ten cities really serve the future digital needs of Europe

"TERRITORIAL INTEGRATION IS NOT ONLY ABOUT PLACING DATA CENTERS IN NEW CITIES. **IT IS ABOUT DEPLOYING DIGITAL INFRASTRUCTURE WHERE DIGITAL NEEDS ARE EMERGING**, CLOSER TO USERS, CLOSER TO RENEWABLE ENERGY, AND CLOSER TO NEW SUBSEA ROUTES."



and its surrounding markets? I do not think so.

For many years, the FLAP markets served as the core of Europe's digital infrastructure. Frankfurt, London, Amsterdam, and Paris carried enormous responsibility for a continent of hundreds of millions of people. Even now, with some growth in secondary markets, we are still trying to serve too much from too few locations.

Territorial integration is not only about placing data centers in new cities. It is about deploying digital infrastructure where digital needs are emerging, closer to users, closer to renewable energy, and closer to new subsea routes. It is also about improving resilience. A distributed digital infrastructure model makes Europe stronger because it reduces dependency on a small number of over-concentrated hubs.

Current Challenges

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Energy

High electricity costs account for up to 70% of data centers operating expenses in Southern Europe, pressuring sustainability.



Regulations

Fragmented permitting processes and lack of public administration training slow development.



Territorial Integration

New infrastructure must harmonize with local communities, minimize environmental impact, and promote renewable energy.

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This is especially important when we look beyond Europe itself. We often discuss Europe as if it is an isolated market of around 400 million people, but if we look at the broader Mediterranean, African, and Middle Eastern geography, we are speaking about several billion people. Europe's digital future is not only about serving Europeans.

It is also about connecting with the surrounding regions that are growing quickly in population, digital demand, and infrastructure requirements.

This is why I believe Southern Europe has a major role to play. The South is not just a secondary part of Europe's digital map. It is a gateway to a much larger geography

Subsea Cable Network in Southern Europe

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Subsea Cables Are Opening New Digital Corridors

Subsea cables are central to this shift. They open new doors into Europe and create new capabilities for exchange between continents.

We often think of these cables as export routes from Europe to surrounding regions. But I also think of them as import routes. We should not assume that Europe will only serve other regions. Over time, we may also receive services, platforms, and digital capabilities from them. We need to avoid being arrogant about the direction of digital value.

The Mediterranean and Atlantic-facing markets are becoming increasingly important because they sit between

Europe and the regions where future digital demand will grow quickly. Connectivity from the Middle East, Africa, and other surrounding geographies will reshape the balance of data exchange.

This is one of the reasons Mediterra DataCenters is focused on locations connected to the sea. We are interested in cities that link terrestrial and subsea infrastructure and that can serve not only their local markets, but also wider cross-border ecosystems. We have invested in places such as Palermo and Barcelona, and we see Lisbon as an increasingly important entry point for Europe.

Lisbon already plays a major role as a digital gateway, and I believe that role will continue to grow.

The role of submarine cables in the geography of investments

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The landing points of submarine cables generate high-value digital ecosystems:



The EU is investing **€347 million** in cable security and resilience, recognizing that without robust backbones it is not possible to expand continental data center hubs.



Southern Europe, thanks to its position, is considered an **ecosystem of complementary hubs** for data centers. This opportunity is strengthened by the new submarine cable corridors crossing the Mediterranean (e.g. Medusa, BlueMed).



New routes in the Red Sea, the Mediterranean, and the Pacific have been built to support **connectivity** between cloud regions and the new data center hubs.



Southern Europe is a growing hub thanks to the arrival of systems such as **2Africa** and **Medusa**, which further reinforce its role as the Mediterranean's digital gateway.

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"WHEN WE SAY THERE IS A LACK OF ENERGY, WHAT WE OFTEN REALLY MEAN IS THAT THERE IS A LACK OF ENERGY IN THE SPECIFIC CITIES WHERE EVERYONE WANTS TO BUILD."

Energy Must Be Used Where It Is Produced

A question often raised is how energy, regulation, and territorial integration can be addressed together, especially when other industries, such as logistics and real estate, face similar constraints.

My answer is that we need to think differently about where digital infrastructure is located.

When we say there is a lack of energy, what we often really mean is that there is a lack of energy in the specific cities where everyone wants to build. No electrical market can absorb unlimited new demand in one location. It is not realistic to place every new digital requirement in Madrid, Paris, Lisbon, or Milan and expect the transmission system to solve everything.

Renewable energy is not produced only in capital cities. It is produced across regions. Yet the largest energy demand is concentrated where population density is highest. For digital infrastructure, we have an opportunity to break that pattern.

We may not be able to relocate populations easily, but we can relocate some digital demand. Instead of forcing all data center development into the same few cities, we should build where energy is available and where connectivity can be extended efficiently.

This also affects heat reuse. District heating is often discussed as a solution, but in much of Southern Europe the infrastructure does not exist. If all Lisbon data centers tried to supply district heating, the system would not be ready to use it. Data centers can provide heat, but someone must be able to consume it.

That is why territorial planning matters. Energy, land, connectivity, regulation, and local integration need to be considered together, not separately.

The shift toward a more sovereign and resilient Europe has already started. Geopolitical uncertainty is accelerating it. Countries, industries, and public administrations are all asking where their digital infrastructure should sit and how it should be controlled.

Shift Towards Southern Europe

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New alternative data center hubs are emerging in digitally strategic, less congested areas

As demand shifts—partly due to FLAP-D saturation, **Southern Europe accelerates**, developing regional digital hubs that extend the digital footprint beyond traditional borders.

Southern Europe has become a **focal point for investors** thanks to a combination of winning factors:



Strategic
geographic
position



Extensive
infrastructure
ecosystem
supported by
submarine and
terrestrial cables



Significant
geopolitical and
economical
capabilities

Shift Towards Southern Europe

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Southern Europe at the Core of Investment Strategies:



Exchange point between Europe, Africa, and Asia



Digital hub not only for Italy but also neighboring countries



Ideal gateway to the Mediterranean and Eastern Europe

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For Southern Europe, this creates a real opportunity. By combining access to energy, subsea connectivity, regional distribution, and proximity to emerging markets, the region can

build a more balanced and resilient digital infrastructure model.

That is the direction I believe the market is moving toward.

New strategic hubs: Palermo, Barcelona and Lisbon

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Palermo - PMO01

- Acquisition of the first carrier-neutral hub in Sicily, located in Carini (PA).
- 2 MW infrastructure, expandable, with low latency toward Europe, Africa, and Asia.

Barcelona - BCN01

- New 100% green data center, 8 MW of scalable IT capacity in 1.3 MW modules.
- Located at one of the main submarine cable nodes in the Mediterranean.

Lisbon

- Lisbon is a strategic location for the next phase of digital development.



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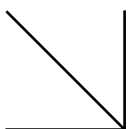
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MEDITERRA: FROM VISION TO REALITY

The Next Generation of Premium Regional Data Centers takes shape in Southern Europe

In recent years, the European connectivity landscape has been undergoing a profound transformation. In Southern Europe - now increasingly central to global data routes thanks to the expansion of submarine cables and the rise of new digital hubs - **Mediterra DataCenters** is accelerating the development of an innovative model of **Premium Regional Data Centers**, designed to bring cloud, AI, and content closer to local territories.



Emmanuel Becker
CEO Meditterra
DataCenters

Mediterra's evolution in Southern Europe

While there is a lot of growth across Europe, the greatest growth of all is seen in Southern Europe. The region is benefiting from greatly improved intercontinental and European connectivity, a boom in affordable renewable energy and a willingness to attract major new technology infrastructure investments. As a result, we see the traditional data centre hubs of Madrid and Milan expanding very rapidly, especially with scale colocation investments. On top of that, new metropolitan hubs are emerging in Barcelona, Rome, and Athens. Furthermore, scale colocation campuses with 10s to 100s of Megawatts are emerging in more remote regions across Portugal, Spain and to some extent Italy.

A proximity-driven network model

In this context, the Premium Regional Data Centers introduced by Meditterra move beyond the traditional model of large, centralized hubs typical of Northern Europe. Each facility is embedded within major data-traffic junctions, close to landing stations and high-capacity networks, ensuring low latency and high performance for AI workloads and other sensitive applications. Additionally, from a sustainability standpoint, this new generation of regional data centers can reduce energy consumption by up to ten times compared to legacy corporate data-processing sites.

"Southern Europe has become the new digital epicenter of the continent. With our Premium Regional Data Centers, we bring high-quality infrastructure closer to end users, enhancing strategic territories and enabling a sustainable, high-performance platform for cloud, AI, and content", **says Emmanuel Becker, CEO of Meditterra.**



THE COMPETITIVE ADVANTAGE OF CURIOSITY

How AI Is Reshaping Jobs, Skills, and Careers,
and Why This Creates Opportunity, Not Risk

Not “Will AI replace my job?” → “How do I become more valuable as AI enters every job?”

SANDER BARENS

Founder & CEO, Capvion,
Europe 2026 GCCM

At the Disruptive & Transformation session during Europe 2026 GCCM in Berlin, Sander Barens, Founder and CEO of Capvion, examined how artificial intelligence is changing the way people work, learn, and build their careers. Rather than presenting AI primarily as a threat to employment, he focused on the opportunities it creates for individuals who are willing to stay curious, understand their customers, and adapt their skills to a rapidly changing business environment.

AI Is Creating Questions About Personal Relevance

At Capvion, we work in M&A advisory and strategy consulting, which gives us the opportunity to speak with many different companies, industries, and decision-makers. At the beginning of this year, we noticed something interesting. Conversations with very different agendas often ended up at the same question, even when AI was not originally part of the discussion.

People wanted to know: what is AI going to mean for me? Am I going to lose my job because of it?

I understand why people ask this. In many boardrooms, AI is discussed as a way to improve efficiency, reduce operating costs, and automate work that is currently done by people. From there, it is natural for employees to wonder what this means for their own careers.

But I believe the more useful question is different: how can I become more valuable as AI becomes part of my work?

We have faced similar moments before. New technologies have repeatedly changed industries, jobs, and business models. When the internet appeared, many people believed physical retail would disappear completely and that large numbers of employees would lose their jobs. Some stores did close and certain roles changed, but the internet also created entirely new sectors, business models, and professions.

The same happened with cloud computing and smartphones. They changed established ways of working, but they also created opportunities that were difficult to imagine before the technology became widely adopted. Looking back, most of us would not want to return to a world without these tools.

AI should be viewed in a similar way. It will automate certain tasks and reshape many roles, but it will also create opportunities for people who understand how to use it and how to connect its capabilities to real business needs.





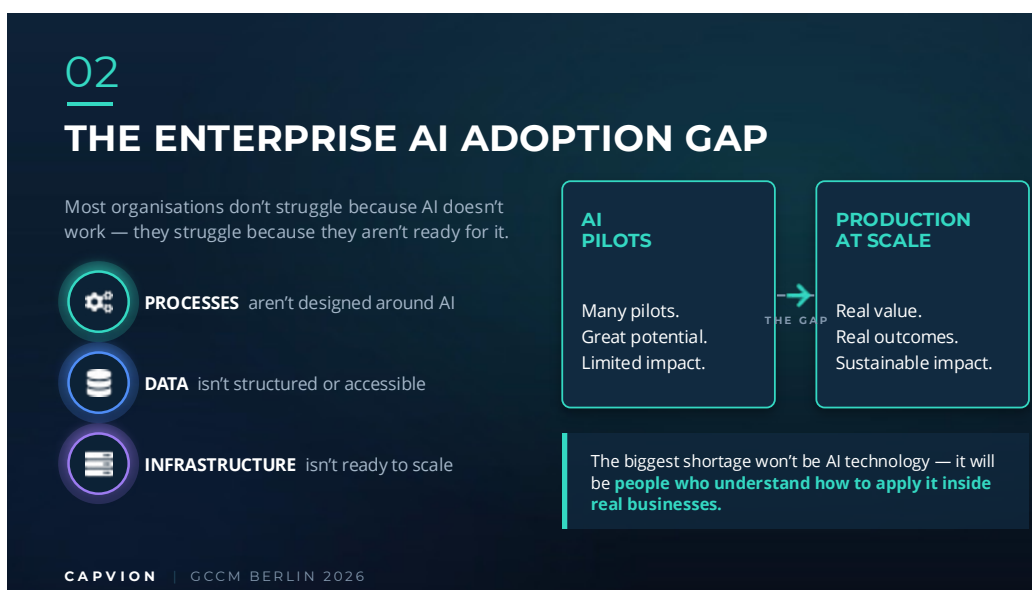
The AI Adoption Gap Is a Readiness Gap

Earlier this year, Capvion published research on the enterprise AI adoption gap. We wanted to understand how far companies had progressed in adopting AI and where they were encountering difficulties.

What we found was that there is no shortage of discussion, experimentation, or pilot projects. Many companies are testing AI tools and exploring potential

use cases. However, the conversion from pilot projects into operational, scalable AI remains very low.

The reason is relatively straightforward. Most companies were not built for AI. Their processes were designed around traditional procurement and operational models. Their data was not always structured or accessible in the way AI systems require, while their infrastructure was created for existing applications rather than the requirements that AI is now introducing.



This means that the biggest barrier is not necessarily the technology itself. The technology exists and is already capable of delivering value. The real problem is readiness, and readiness is ultimately a people issue.

This is why I see an increasingly important role emerging inside organizations: the translator. What is often missing is somebody who understands enough about AI and technology, but also understands the

"THIS MATTERS BECAUSE INNOVATION IS MOVING MUCH FASTER THAN IT DID IN PREVIOUS TECHNOLOGY CYCLES."



customer, the business, and the outcome the organization is trying to achieve.

That person becomes the bridge between the two sides. On one side, you have AI, infrastructure, data, and technology. On the other, you have the business problem and the outcome you want to create. The translator does not necessarily need to be the person building the AI model. We will have excellent AI engineers for that. The translator needs to understand what the technology can do and how it can be applied to a real customer or business need.

That ability to connect technology with outcomes is becoming increasingly valuable. It also creates an opportunity for people who may not see themselves as technical AI specialists but who understand customers, markets, and how businesses actually operate.

The Skills That Will Matter Most

The first skill I would highlight is curiosity. Curiosity means continuing to learn, asking questions, and being willing to explore unfamiliar tools and ideas. Talent may help you enter a company or secure a certain role, but continuous learning is what allows you to remain relevant once you are there.

This matters because innovation is moving much faster than it did in previous technology cycles. Knowledge and skills can lose relevance quickly, which means we must become comfortable with

learning, unlearning, and relearning.

Customer understanding is equally important. This is especially relevant in telecom, where we have traditionally focused heavily on products, features, capacity, and technical specifications. AI is very good at producing answers, but those answers are ultimately suggestions. It is much less effective at knowing which question matters most to a particular customer.

That still requires human judgement, listening, and experience. The quality of the outcome depends on how clearly we understand what the customer is trying to achieve. AI can support us in solving the problem, but we must first define the right problem.

Communication also becomes more important when everyone has access to similar intelligence. The internet is available to all of us, and AI tools can generate research, summaries, and recommendations within seconds. Having access to information is therefore less of a differentiator. What matters is how we interpret that information, connect it to a particular situation, and use it in a conversation.

This is also why in-person interaction continues to matter. At conferences, we may schedule formal meetings and attend structured networking sessions, but many of the best conversations happen naturally after a session or over coffee. That is often where we begin to understand what someone really needs and where new opportunities emerge.

Finally, there is adaptability. AI will create change, and some of that change will be uncomfortable. People will need to adjust how they work, which tools they use, and where they contribute the most value.

Those who remain too attached to a fixed job description may find this difficult. Those who see their role as something that can evolve will be in a stronger position.



Moving Up the Value Conversation

For people working in telecom, this means we need to move higher in the customer conversation. Talking only about products, features, port speeds, or network specifications is becoming less distinctive. Much of that information can already be compared, summarized, or handled through automated systems.

The opportunity is to become more of a transformation partner to the customer. Instead of focusing only on what we sell, we need to understand the

customer's growth plans, operational problems, and commercial objectives, and then consider how technology can support those outcomes.

The question is how to develop that understanding when everybody is already busy. I believe the time is there, and it does not have to take hours. I suggest a very simple daily practice: 10 + 10 + 10 minutes.

Spend the first 10 minutes learning something about AI. It can be a new development, a tool, a use case, or simply understanding how somebody else is applying it. You do not need to become an AI engineer. The



objective is to remain curious and build your understanding gradually.

Then spend 10 minutes learning about one of your customer's industries. Look at what is changing in their market, what pressures they are facing, and what developments could affect their business.

Finally, spend 10 minutes asking: what does this mean for my customer? Connect what you have learned about AI with what you have learned about that industry. What could change for the customer? Where could the technology help? What problem could it solve, or what opportunity could it create?

That is 10 + 10 + 10 minutes, half an hour a day. It does not sound like much, but the value comes from doing it consistently. Over time, those insights compound and make you better prepared for customer conversations. The objective is not to use

AI simply because it is available. It is to understand where it can create value.

So, will some jobs be automated? Yes. AI will improve efficiency, reduce the need for certain tasks, and reshape how companies operate. But that is only one part of the story.

The larger opportunity is personal. As AI becomes more capable, there will be increasing value in people who can understand change, ask the right questions, and connect technology with what customers and businesses actually need.

Curiosity is what allows us to do that. It keeps us learning, adapting, and looking beyond the way we work today. In the age of AI, curiosity is not simply a personal quality. It is a competitive advantage.

06

THE COMPETITIVE ADVANTAGE OF CURIOSITY

Invest 30 minutes a day in your future — **most people won't, and that is exactly why it becomes an advantage.**

10 MIN



Learn something about AI

+

10 MIN



Learn about a customer's industry

+

10 MIN



Ask: what does this mean for my customers?

30 min a day × 365 days = **180+ hours of compounding insight** · a lasting competitive advantage.

CAPVION | GCCM BERLIN 2026



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NOW**

türkiye focus

EUROPE-ASIA CORRIDOR IN TELECOMMUNICATIONS

TURKISH TELECOM SERVICE PROVIDER OFFERS NEW SOLUTIONS AND INITIATIVES TO ITS CUSTOMERS

Türk Telekom International (TTI) is the international wholesale arm of Türk Telekom, Türkiye's leading telecommunications provider with a legacy spanning over 180 years. TTI serves as the premier connectivity bridge between Europe, the Middle East, Caucasus and Asia, operating one of the most strategically positioned fiber networks in the CEE region.



Headquartered in Istanbul, TTI leverages Türkiye's unique position at the crossroads of three continents (Europe/Middle East/Asia) to offer unparalleled low-latency connectivity along the Europe-Asia corridor. With a 50,000+ km fiber network, including Türkiye, Points of Presence across 17 countries, and coverage in Romania, Hungary, Bulgaria, Germany and the Netherlands within the CEE region, TTI has established itself as the backbone of digital connectivity in the region. In customer growth over

the past year, the company onboarded 22 new wholesale customers in the CEE region (carriers, ISPs, content providers), while enterprise customer base grew 35% year-over-year, driven by Cloud Connect adoption.

A geographic bridge

The General Manager of Türk Telekom International, Yavuz Yildirim explains that what sets TTI apart from competitors is that it provides a geographic bridge connecting three



continents – something unmatched in CEE. Also, it is able to offer its customers a comprehensive portfolio with Dark Fiber, Managed Wavelength, Ethernet, IP Transit, DIA, IP-VPN, Cloud Connect, Remote-IX, IPX, Co-Location and Wholesale Voice. As for infrastructure depth, it has at its disposal 40,000+ kms of owned and leased fiber infrastructure with strategic redundancy and a carrier ecosystem consisting of 150+ voice interconnections and extensive IP peering. Its Eurasia Express Route is a Türkiye-based corridor that reduces Europe-to-Asia round-trip latency by up to 40% vs. alternative routes – connecting European, Middle Eastern, and Chinese markets with unmatched speed.

Service innovation – IPX ecosystem evolution

Over the past 12 months, TTI has significantly advanced its IPX ecosystem, strengthening its position as a strategic interconnection hub across East Central Europe. The IPX platform has evolved into a multi-protocol interworking environment supporting SS7, Diameter, and HTTP signaling within a unified framework, enabling operators to accelerate VoLTE and 5G roaming deployments without costly core network upgrades. The platform

PHOTO BY TÜRK TELEKOM INTERNATIONAL

TERRESTRIAL NETWORK BACKBONE & SEA CABLES



türkiye focus

introduces intelligent traffic orchestration – dynamic routing, automated policy control, and real-time service optimization – delivering measurable improvements in latency reduction, onboarding speed and operational efficiency. Commercially, the upgraded IPX ecosystem has reduced interconnection deployment timelines by up to 60%, significantly accelerated partner onboarding, and enabled faster time-to-market for roaming and messaging services across CEE, the General Manager points out.

Services, solutions and initiatives

As for new services, solutions or initiatives Türk Telekom International has launched in the past 12 months and how these have benefited the market and its customers/partners, Yavuz Yildirim proudly mentions a couple of examples.

TTI launched the Enhanced Cloud Connect Service dedicated multi-cloud connectivity across CEE PoPs enabling direct, private connections to AWS, Azure, Google Cloud, Oracle Cloud and 150+ other CSPs. It eliminated internet-based connectivity, reducing latency by 60% and improving security posture for enterprise customers. It

has been deployed in eight CEE markets with 35+ active enterprise customers within six months of launch.

As a next-generation subsea corridor, AMEERS is a unique cable system developed through the collaboration of six carriers, with TTI playing the leading role. Built on a partnership-driven model, AMEERS differs from traditional submarine cable projects where each participant is typically required to invest USD millions. Instead, the concept was to integrate existing network segments owned by each carrier into a seamless end-to-end system connecting the Gulf region to Europe through a diversified, protected, and one of the shortest available routes. AMEERS has proven highly successful, both in terms of the revenue it has generated and the value it has brought to the telecommunications industry. Building on this success, the next-generation system, AMEERS2, has been successfully launched, further enhancing connectivity and expanding the capabilities of the original network. As Syria re-establishes its position in the international telecommunications market, Türk Telekom International has been proud to support this transformation. The service provider developed a transit corridor between Syria and Türkiye, leveraging more than five interconnection points to deliver maximum

network diversity and resilience, enabling connectivity in a transforming market. In less than a year, TTI successfully provisioned nearly 1 Tbps of capacity for Syrian operators, significantly enhancing their connectivity capabilities and supporting the growth and development of their businesses.

This achievement reflects TTI's commitment to enabling reliable, high-capacity international connectivity and contributing to the advancement of the telecommunications sector in Syria.

Evolving political dynamics in the South Caucasus have unlocked new connectivity opportunities.

TTI is establishing terabit-scale connections from Southeastern European Points of Presence (Sofia, Bucharest, Istanbul) through Armenia and Nakhchivan to Azerbaijan and onward to Central Asia – leveraging recently normalized regional relations. This corridor provides a direct, geopolitically diverse alternative to traditional routes, connecting the Caucasus and Caspian regions at terabit capacity levels with multi-year agreements already in place.

Türk Telekom International introduced comprehensive DDoS protection as a service that leverages its European scrubbing center with a multi-vector protection up to 1 Tbps. It is integrated with IP Transit and Cloud Connect

for end-to-end security. Within the CEE region, TTI added 500+ kms of new dark fiber routes, connecting additional data centers and carrier hotels in Bucharest, Budapest and Warsaw. These routes support growing demand for dedicated infrastructure from hyper-scalers and financial institutions.

Exceptional customer service, substantial revenue growth

TTI boasts 24/7/365 multi-lingual NOC support (English, Turkish, Romanian, Hungarian, Bulgarian, German, Czech); an average incident response time of 8 minutes (industry benchmark: 30 minutes); customer portal with real-time bandwidth analytics, ticket tracking, and self-service provisioning; and dedicated customer success managers for all enterprise and wholesale accounts.

Over the past 12 months, TTI has driven 22% revenue growth, expanded network capacity by 50%, launched innovative services including enhanced Cloud Connect and 2.0 with zero-touch provisioning, and achieved 94% customer renewal rates. With all that achievement, Türk Telekom International continues to demonstrate regional leadership, technological innovation and exceptional customer partnerships, the General Manager concludes. **100%**



THE STRATEGIC IMPACT OF **DATACENTERS & EDGE COMPUTING** ON MEETING FUTURE DIGITAL DEMAND IN THE REGION

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Moderator:



ERIK VAN STOKKOM
Chief Moderator and M&A,
Carrier Community

Keynote Speaker/
Panelist:



RUI FRANCO
General Director,
REN Telecom

Keynote Speaker/
Panelist:



EMMANUEL BECKER
CEO, Mediterra DataCenters

Panelist:



CARLOS PAULINO
Managing Director, Equinix

Panelist:



ARNAUD LEGAY
REGIONAL VP, TEMPLUS
CENTROS DE DATOS

Panelist:



JORGE ANDRADE SANTOS
Head of International
Wholesale, MEO
Wholesale Solutions

At the SIS 2026 Summit in Lisbon, the discussion around datacenters and edge computing quickly became a broader conversation about Portugal's role in the digital map of Europe, Africa and the Atlantic. Sponsored by REN Telecom and Mediterra DataCenters, the panel brought together network, datacenter and wholesale experts to discuss how Portugal and the wider Iberian region can respond to rising demand, from cloud and AI workloads to subsea connectivity and regional digital sovereignty.

Portugal's Digital Hub Is No Longer Just an Idea

Jorge Andrade Santos, Head of International Wholesale at MEO Wholesale Solutions, opened with a clear view: Portugal is in a much stronger position today than it was several years ago. The country's digital ecosystem has become more collaborative, more mature and more aware of the opportunity in front of it.

"At the national level, where we are right now is far better and far more collaborative than what we used to have seven or eight years ago," Jorge said. He pointed to the Portugal Data Center Association as a visible example of this change. Competitors, partners, customers and suppliers now sit around the same table, including players such as Equinix, REN Telecom, MEO and others.

"We work more or less in the same space, but we can work together and we know where the boundaries are between collaboration and competition," he explained. Competition, in his view,

will always exist and is healthy. But Portugal's development as a digital hub cannot depend on one company alone.

The way the Portuguese digital hub is now being promoted also reflects this shift. "It is not just about REN, or just about MEO, or just about what Equinix is doing in Portugal," Jorge said. "It is about what is happening in the country, and then what each of us can do to help."

He stressed that the need for Lisbon and Portugal is no longer something the market has to be convinced of. "We are not saying, let's create a buzz, let's create the need to be in Lisbon. Now there is the need to be in Lisbon. There is the need to be in Portugal. There is the opportunity to take."

The practical challenge now is managing that opportunity. New players are entering the market, subsea systems need to be connected to datacenters, and networks need to support the next stage of demand. The question is no longer whether Portugal can become a relevant hub, but how quickly it can organize itself to meet the demand already arriving.

Jorge also pointed to the role of the European Union, particularly around digital sovereignty. "The European Union finally brought everyone closer," he said. "You start to see projects being driven by European companies, by new companies or companies that were smaller, and now they understand there is a need for sovereignty."

He sees growing collaboration between Portugal and Spain, while acknowledging that there is still work to do. Collaboration with Africa will also remain essential.



"North Africa is almost 100% dependent on Europe," Jorge noted. Sub-Saharan Africa is more diversified due to routes toward the Middle East, Asia and Brazil, but Europe still carries a large share of African international connectivity.

Where Jorge sees a missing piece is South America. "One thing that is lacking is our bridge to South America," he said. "I really don't get how we became so apart." Despite shared language, culture and business ties, South America remains much more focused on its own region and on North America.

He acknowledged the importance of EllaLink, but stressed that one cable cannot carry the whole strategic opportunity. "To have one single system connecting and probably not yet at full usage does translate to what I think we need to promote in terms of collaboration," he said. "Probably instead of being so supportive of North America, we need to connect each other."

From Vertical Networks to Digital Corridors

The audience also joined the discussion, with Samuel Carvalho CEO of TelCables Europe, adding a perspective on the shift in connectivity architecture. He argued that the industry still often thinks in vertical routes, while future demand requires more horizontal and regional thinking.

"We must see that there is a shift in terms of the architecture of connectivity," Samuel said. "In the past, and still in the present, we look at vertical ways of connectivity."

He gave the example of SACS, Angola Cables' South Atlantic Cable System between Angola and Brazil. When it was launched, many large companies did not immediately understand the logic of east-to-west or south-to-south connectivity. "Now they are doing this," he said, "and why? Because of the new surge of AI."

Samuel pointed to Fortaleza as an example of how a location can become a traffic hub when content, cables and datacenters align. "Most US companies are doing the opposite now. They are getting the Brazilian feed in Fortaleza, rather than going to São Paulo," he explained. "That is why Fortaleza is a hub."

He believes Lisbon could follow a similar path. The growing gravity of datacenters will encourage Brazilian operators and other international players

to source traffic directly in Lisbon rather than routing through London, Paris or Marseille. "This shift will be even more visible when AI starts not to be remote, but more edge-based," he said.

Arnaud Legay, Regional VP at Templus Centros de Datos, agreed that the industry needs to think in terms of digital corridors rather than isolated assets. "We have to work together to make it one digital corridor to support customer needs across the region," Arnaud said.

For Templus, the key pillars are consistency, security, sustainability and sovereignty. A few years ago, the conversation was mainly about location. Now, he said, it is about latency and data gravity.

"The use cases are very different," Arnaud explained. "Some need to be in one location, some need to be distributed. So it is very fragmented." This is why the ecosystem matters. Lisbon, in his view, has the elements to become a strong hub because subsea connectivity, datacenter development and terrestrial routes are beginning to converge.

He described Lisbon as an ecosystem that is still growing, but already strategically important. "We believe in this market and we want to contribute to making Lisbon a very digital hub, thinking about the corridor toward continental Europe."

Carlos Paulino, Managing Director at Equinix, brought the view of a global datacenter operator with long experience in Portugal. Equinix has operated in the country for 26 years and has seen multiple waves of demand.

"What we saw in the last five years, with the acceleration of demand and the number of players entering the country, means that we are doing it well and taking the right moves," Carlos said.

Being part of a global company also gives Equinix the ability to compare Portugal with other European markets. "That gives us a powerful insight into what makes Portugal special," he added. The ecosystem in Lisbon is one clear differentiator, but power is equally important.

Carlos praised the progress Portugal has made in addressing access to power. "I see Portugal as an example for the entire region because all countries are struggling with grid access, and we have done it in a very clever way."

He also highlighted the creation of

the Portugal Data Center Association as a turning point. “We can state two eras: before the association and after the association,” Carlos said. For him, the association has helped align stakeholders, communicate with government and support the national plan for datacenters.

Still, he argued that Portugal must now go further. The market should not treat all datacenters as the same. Different use cases require different types of facilities.

“The panel is about edge,” Carlos said. “You need edge, and you need to be close to where data is produced and consumed.” This is essential for cloud regions, AI workloads and domestic digital demand. Portugal, he added, is still working to catch the cloud wave.

“If we don’t have the data here, we will not have the algorithms here,” he said. “We need to comply on all fronts if we want to be different from any other location competing with us.”

Cloud, AI and the Need for the Right Routes

Jorge agreed strongly with Carlos on segmentation. “We are not just developing mega large datacenters for AI,” he said. “We need every type of datacenter to serve every type of segment.”

Portugal has worked hard to develop colocation and interconnection, but cloud remains a gap. “Cloud, we are still a long way from achieving that,” Jorge noted. “It is as important as all the others.”

He also pointed to emerging neocloud opportunities and the need to prepare for new types of demand. This means the country needs not only large AI-scale facilities, but also cloud regions, interconnection sites and edge facilities close to users and enterprise demand.

Carlos emphasized that Portugal is accelerating, but the work is not finished. “The last five years have been important,” he said, but the next phase must bring more visibility, stronger execution and a better-defined national offer.

Emmanuel Becker, CEO of Mediterra DataCenters, then challenged the way Portugal often positions itself in relation to Spain. He argued that Portugal should not see itself merely as feeding Madrid.

“We are always feeling that Portugal is feeding Madrid. I totally disagree with that,” Emmanuel said. He believes



“I AM REALLY TRUSTING IN PORTUGAL BEING ABLE TO BECOME A DIGITAL HUB SERVING SPAIN,”

Portugal should position itself as a hub that serves Spain, Europe, North Africa and parts of South America.

For Emmanuel, two new route strategies are especially important. The first is a northwestern route. “Portugal to the northwest is important because you have Bilbao or Santander with new cables coming, then Bordeaux, then Paris, and you avoid Madrid,” he said. This is not about avoiding Madrid for competitive reasons, but about creating more efficient and diverse routes to the FLAP markets and northern Europe.

The second is a southwestern route that would strengthen Portugal’s role toward North Africa and the Maghreb. “Who will be the best one to serve the Maghreb?” Emmanuel asked. “Do you feel it is Valencia or Barcelona? It is too far. The first landing point is Portugal.”

He argued that Portugal should become more aggressive in attracting digital service providers, not only to serve the Portuguese market, but to serve other markets from Portugal, including Spain.

“I am really trusting in Portugal being able to become a digital hub serving Spain,” Emmanuel said.

When asked whether this means competing with Marseille, Emmanuel was clear that the goal is not to replace existing hubs. “We will never kill Marseille,” he said. “But we will create differentiation. Portugal is a

differentiator in Iberia, in West African traffic and in South American traffic.”

A Shared Ecosystem, Not Separate Industries

The strongest common theme across the discussion was that no single player can deliver the opportunity alone. Datacenters, subsea cables, terrestrial networks, cloud providers, operators and energy companies all need to align.

Carlos pointed to Google’s Nuvem cable as a signal of change. “Nuvem will be the first cable to bring data directly from North America first to Portugal and then to Europe,” he said. This means Portugal can begin to serve traffic into Europe more actively rather than acting only as a landing point.

He described Portugal as sitting at a crossroad of digital highways. “The opportunity is absolutely incredible,” Carlos said. “It is in all our hands to capture this opportunity and deploy a better digital world.”

Arnaud returned to the idea of proximity. “This is at the heart of everything we do,” he said. But proximity must be combined with a global view. Hyperscalers already account for a large share of subsea cable traffic, and as they arrive in Lisbon, the region must be ready with a segmented and distributed approach.

“We need to be local and global,” Arnaud said. “That is the need.”

Jorge used his closing remarks to underline the importance of new cables and new routes, while also reminding the room that Portugal already has a history of transatlantic connectivity. He welcomed the new systems coming in, but stressed that the opportunity ahead is even larger.

“What is coming is huge,” he said.

Rui Franco, General Director at REN Telecom, brought the conversation back to infrastructure integration. For Rui, the key lesson is that the sector should think beyond datacenters alone.

“It is a single ecosystem,” Rui said. “With this huge growth we are facing, we have to align investments and collaborate more and more.”

He suggested that even the Portugal Data Center Association may eventually need a broader name. “I would propose changing it from Portugal Data Center Association to Portugal Digital Infrastructure Association,” he said.



“WITH THIS HUGE GROWTH WE ARE FACING, WE HAVE TO ALIGN INVESTMENTS AND COLLABORATE MORE AND MORE.”

Emmanuel closed with a similar message. “We are absolutely complementary,” he said. “Without one of us, we cannot deliver this vision.”

He added that the industry should return next year with proof of progress. “Next year, we will show that we delivered something.”

The panel made clear that Portugal’s opportunity is real, but not automatic. The country has subsea routes, datacenter investment, power advantages, proximity to Africa and South America, and growing European relevance. But to meet future digital demand, it must move from potential to execution.

The message from Lisbon was practical and direct: the ecosystem is forming, the demand is arriving, and the next step is delivery.

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ENHANCING DIGITAL CONNECTIVITY: Strategies for Peering, and Cable Investments to Address Current and Future Regional Demands

Moderator:



ERIK VAN STOKKOM

Chief Moderator
and M&A, Carrier
Community

Keynote Speaker/
Panelist:



MOHAMAD IBRAHIM

CEO, Interfiber
Networks LDA

Keynote Speaker/
Panelist:



JORGE ANDRADE SANTOS

Head of International
Wholesale, MEO
Wholesale Solutions

Panelist:



THERESA BOBIS

Regional Director
South Europe,
DE-CIX Management
GmbH

Panelist:



MANUEL CABUGUEIRA

Board Member,
ANACOM

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At the SIS 2026 Summit in Lisbon, industry leaders gathered to discuss how peering strategies, subsea cable investments, and digital infrastructure partnerships are shaping the future of connectivity across Portugal, Europe, Africa, and beyond. The panel explored how the region can respond to increasing demands for resilience, data processing capacity, cloud infrastructure, and international connectivity at a time when AI, edge computing, and content consumption continue to accelerate.



From Cable Landings to Digital Ecosystems

One of the clearest themes throughout the session was that digital infrastructure can no longer be approached in isolated layers. Internet exchanges, terrestrial networks, subsea systems, cloud environments, and data centers now depend on one another far more directly than before.

Theresa Bobis emphasized that internet exchanges have become essential in transforming cable landings into functioning digital ecosystems. Over the last three decades, DE-CIX has focused not simply on connectivity, but on creating environments where traffic can be exchanged locally, efficiently, and with lower latency.

“When subsea cables land, they still need to connect into an ecosystem,” she explained. “You need content providers, cloud providers, operators, enterprises, and networks all connected together.”

In Theresa’s view, Lisbon’s growth has not happened only because more cables are arriving in Portugal. The real difference has been the development of the surrounding ecosystem. Operators are no longer looking solely for landing stations. They are looking for places where traffic can be exchanged, cloud providers can interconnect, and enterprises can localize services.

“You cannot simply land a cable and expect the market to develop by itself,” she said. “The ecosystem

around it is what creates value.”

Peering, she added, has become increasingly important from both a resilience and performance perspective. While IP transit remains critical, internet exchanges provide an additional layer of redundancy and local traffic optimization.

“If transit has problems, networks connected through the exchange can still communicate locally,” Theresa said. “That improves resilience immediately.”

The growing localization of content and applications is also changing traffic flows. More operators want traffic to remain regional instead of crossing multiple international routes unnecessarily. Internet exchanges therefore play an increasingly strategic role in reducing latency and supporting cloud and AI workloads.

Theresa also highlighted the collaborative nature of Lisbon’s infrastructure environment. Companies that may compete commercially are often working together operationally to strengthen the broader ecosystem.

“We are collaborating with operators, carriers, infrastructure providers, and enterprises,” she said. “That collaboration is one of the reasons Lisbon is developing so quickly.”

Digital Capacity Becomes the New Priority

For **Manuel Cabugueira**, the conversation around infrastructure is



evolving far beyond basic connectivity.

“The issue today is not simply having access to networks,” he said. “The issue is having access to digital capacity.”

That distinction became one of the most important points raised during the session. Manuel argued that future competitiveness will depend not only on cables or connectivity, but on a country’s ability to process, store, analyze, and exchange data locally.

“We need data centers, edge computing, AI capabilities, and local processing power,” he explained. “Connectivity alone is no longer enough.”

Portugal, according to Manuel, has a strong opportunity to position itself as a bridge between Europe, Africa, and the Atlantic world, particularly because of its geographic position and historical links to Portuguese-speaking countries.

He referred to recent visits across Angola, Mozambique, São Tomé, Cape Verde, and Timor-Leste as part of a broader effort to understand how digital ecosystems can become more integrated across these regions.

“If we want real equality in access to technology,” Manuel said, “then we need to think beyond cables and focus on value creation.”

The discussion repeatedly returned to the idea that Portugal’s opportunity lies not simply in geography, but in its ability to create a stable and attractive investment environment.

According to Manuel, investors increasingly look for transparency, regulatory predictability, and

simplified deployment processes.

“The important words today are transparency, stability, simplicity, and cooperation,” he said.

At the same time, he acknowledged that one of the biggest barriers remains the complexity of infrastructure licensing. Large-scale projects often involve multiple ministries, environmental agencies, municipalities, energy authorities, telecommunications regulators, and maritime institutions.

“In some cases, there may be almost twenty entities involved in one infrastructure approval process,” he noted.

That reality has intensified discussions around creating more coordinated licensing structures and simplified approval frameworks.

“The market needs faster execution,” Manuel admitted. “But we also need to preserve resilience, security, and public trust.”

Recent infrastructure incidents across Iberia, including energy disruptions and severe weather events, have reinforced the importance of resilient and diversified digital infrastructure. According to Manuel, every major outage reminds governments and regulators that telecommunications systems have become critical national infrastructure.

“When communications fail, society immediately notices,” he said.

Portugal Expands Beyond Lisbon

Jorge Andrade Santos described

“EVERY LOCAL ROUTE CAN BECOME AN INTER- NATIONAL ROUTE,”

how MEO Wholesale Solutions is adapting to the next stage of Portugal's digital infrastructure growth.

For Jorge, one of the most important developments has been the growing cooperation between operators, infrastructure providers, regulators, and industry organizations.

“We are in a much more collaborative environment than we were seven or eight years ago,” he said.

He pointed to the Portugal Data Center Association as an example of how competitors are increasingly working together to promote the country internationally.

“We compete commercially,” Jorge explained, “but we also understand where collaboration creates value.”

That collaborative mindset has become especially important as Portugal attracts larger international infrastructure projects.

MEO's strategy combines subsea connectivity, terrestrial diversity, satellite infrastructure, teleports, and carrier-neutral environments. Jorge stressed that the next phase of growth cannot remain concentrated only in Lisbon and Sines.

“We need more geographic diversity,” he said.

One of MEO's major projects involves expanding into Porto through the development of an integrated cable landing station and carrier-neutral facility.

“The objective is not only more subsea connectivity,” Jorge explained. “It is also about improving terrestrial routes toward Spain and the rest of Europe.”

The need for diversification was another recurring topic throughout the session. Several speakers noted that over-concentration creates operational risks, especially as traffic volumes continue growing rapidly because of cloud services and AI applications.

Jorge also emphasized that Portugal still needs stronger cloud localization.

“We are still trying to catch the cloud wave,” he admitted.

According to him, Portugal cannot fully benefit from AI development without first attracting broader cloud infrastructure investment.

“If the data is not here, the algorithms will not be here either,” he said.

That point was reinforced later in the discussion by Carlos Paulino from Equinix, who joined the conversation from the audience. Carlos noted that Portugal has made major progress over the last five years, particularly in building a stronger digital ecosystem, but there is still work ahead in developing all layers of infrastructure demand.

“We need every type of data center,” Carlos said. “Not only hyperscale infrastructure.”

Edge facilities, cloud regions, enterprise colocation, interconnection hubs, and AI-oriented infrastructure all need to develop simultaneously if Portugal wants to establish itself as a truly diversified digital hub.

International Connectivity and the Atlantic Opportunity

Mohamad Ibrahim brought a broader international and engineering-focused perspective to the panel.

“The challenges are actually the opportunities,” he said.

For Mohamad, resilience is not simply a technical objective but a business necessity. Networks today cannot tolerate long interruptions, particularly as enterprises become increasingly dependent on cloud applications, financial platforms, and AI services.

“If your network goes down for hours, you lose customers,” he said. “If it goes down for days, you lose the business.”

Interfiber Networks has focused heavily on resilience through routing diversity, energy efficiency, and operational redundancy, especially across

African markets where infrastructure conditions can vary significantly.

Mohamad described how the company has integrated hybrid energy architectures into its operations, combining conventional power systems with renewable energy sources to improve reliability and reduce unnecessary energy conversion.

Part of that approach proved particularly valuable during recent regional disruptions.

"When the strait was closed, we were not affected by power problems," he explained. "That is what resilience means in practice."

The discussion then shifted toward Portugal's broader international positioning. Mohamad argued that Portugal still thinks too narrowly about some aspects of its infrastructure strategy.

"Sometimes connectivity between Lisbon and Madrid costs less than connectivity inside Lisbon itself," he observed.

For him, this reflects a market that still treats local infrastructure primarily as domestic infrastructure rather than as part of larger international routes.

"Every local route can become an international route," he said.

Mohamad also connected Portugal's future digital opportunity to its historical identity.

"Portugal has always had a global mindset," he remarked. "It still has that international reach through language, geography, and relationships."

That perspective strongly resonated with the broader panel discussion. Manuel Cabugueira agreed that telecommunications infrastructure is inherently international and increasingly dependent on cross-border coordination.

"The digital ecosystem is global by nature," Manuel said.

He also suggested that resilience and infrastructure governance may eventually require broader regional coordination mechanisms extending beyond Europe itself.

A More Collaborative Future

As the session concluded, collaboration emerged as the defining idea connecting every part of the discussion.

Theresa Bobis stressed that Lisbon's

international visibility still needs to grow further. Many global players remain unaware of how rapidly the Portuguese ecosystem has developed over recent years.

"We still need to explain what is happening here," she said. "Not only in Europe, but internationally."

For Theresa, Portugal's opportunity lies in presenting itself not simply as another cable landing destination, but as a fully integrated digital ecosystem.

Manuel Cabugueira returned to the idea that infrastructure discussions must now focus on creating digital capacity at every level.

"It is not only about deploying cables," he said. "It is about building the ability to create and process value locally."

Jorge Andrade Santos emphasized that resilience and collaboration have become inseparable.

"In wholesale telecommunications, your competitor is often also your customer, your supplier, and your partner," he observed.

That reality has helped create a more cooperative environment inside Portugal's infrastructure community, particularly as the scale of international investment continues increasing.

The final reflection came from Mohamad Ibrahim, who questioned why collaboration remains limited in some parts of the industry when it already exists naturally in others.

"Submarine cables are usually built through consortiums," he said. "So why shouldn't we build digital ecosystems with the same mentality?"

The discussion closed with a clear sense that Portugal's next phase of digital growth will depend less on individual infrastructure projects and more on how effectively the country integrates its subsea systems, terrestrial routes, internet exchanges, cloud infrastructure, data centers, and regulatory frameworks into one coordinated strategy.

The opportunity is already visible. The challenge now is scaling the ecosystem quickly enough to meet the demand that is arriving.

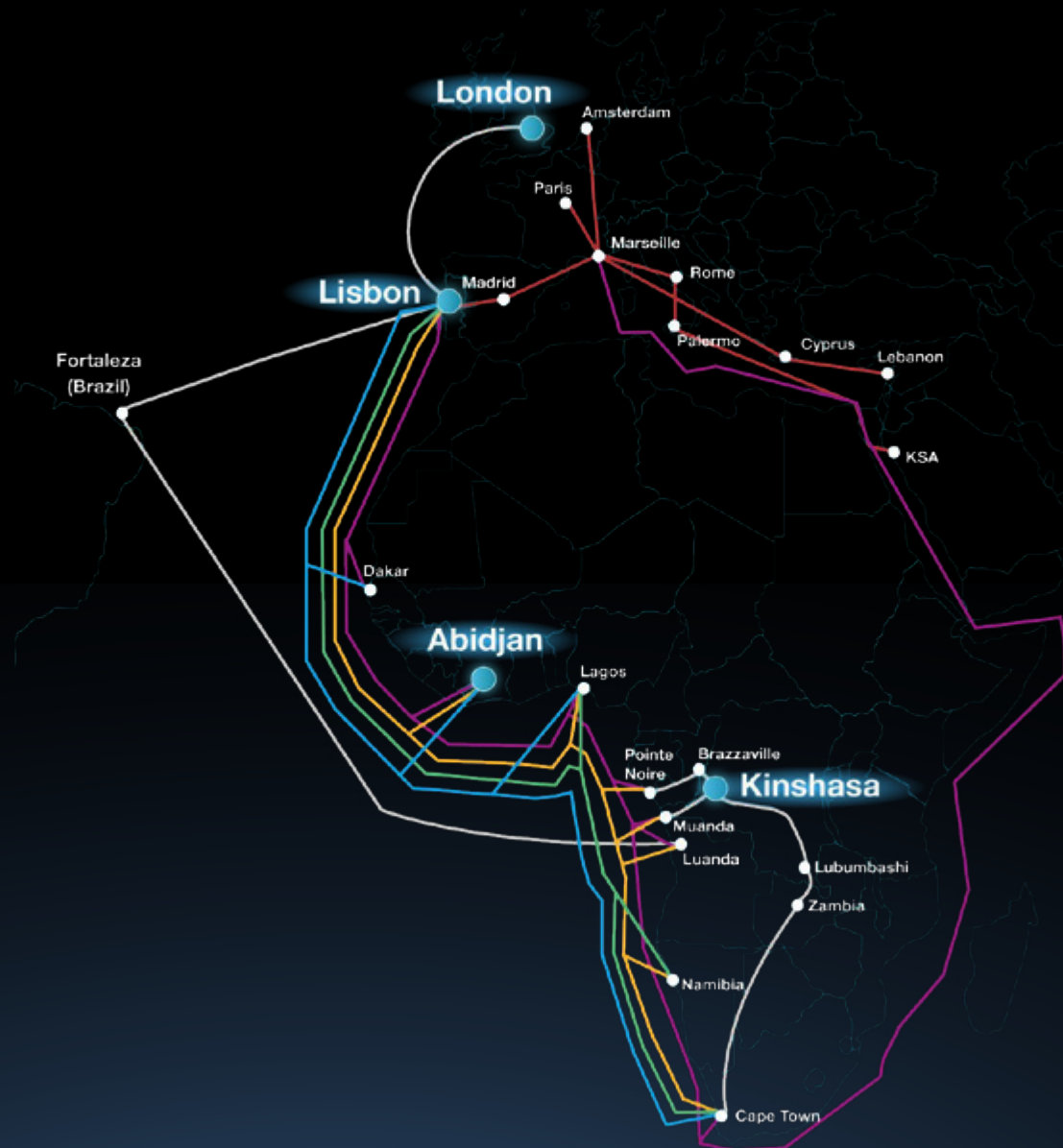
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The role of the **AI, NaaS & Cybersecurity** in the digital transformation era today and tomorrow



Moderator:
Erik van Stokkom,
Chief Moderator and
M&A, Carrier Community



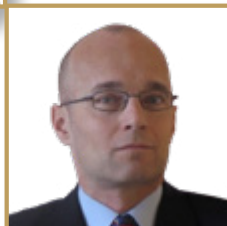
Panelist:
Erkan Satik,
Director of Cloud
Ecosystem & Alliances,
Wingu.Africa



Panelist:
Jimmy Jones,
Head Of Security,
ZARIOT



Panelist:
Michael Markin,
MVNO Enabler, Teliqon



Panelist:
Przemysław Gągała,
International Sales
Director, Hawe Telekom

Artificial intelligence, Network as a Service (NaaS), cloud infrastructure and cybersecurity are reshaping how enterprise networks are designed, managed and consumed. As digital transformation accelerates, operators, infrastructure providers and technology vendors are looking beyond connectivity alone, focusing instead on building secure, flexible ecosystems that can support increasingly distributed workloads. During this panel discussion at Europe 2026 GCCM, industry leaders explored how customer expectations are changing, why collaboration has become essential, and how AI and automation can help build more resilient networks without replacing human expertise.

Enterprise Networks Are Becoming More Than Connectivity

Michael Markin, Teliquon

Opening the discussion on how enterprise networking is evolving, Michael Markin explained that connectivity has moved far beyond simply linking office locations. Today, virtually every business process depends on secure, reliable access to cloud services, distributed applications and connected devices.

"The current situation from our standpoint is that everything is becoming virtual. Everything is cloud-based and everything needs to be connected. It's no longer just offices. People, computers and devices all need secure connectivity."

While cloud adoption continues to grow rapidly, he pointed out that one familiar challenge still remains.

"The one thing that still remains is the last mile. Maybe not everything can be fully cloud-based because somewhere physical connectivity still exists. That is one of the biggest challenges today."

For Michael, Network as a Service is about much more than technology. It represents a shift towards delivering connectivity as a flexible service while ensuring the commercial model remains sustainable for both providers and customers.

"We have to find a way to make networks truly service-oriented while creating commercial models that work for everyone."



Jimmy Jones, ZARIOT

Jimmy Jones argued that enterprise expectations have changed dramatically over recent years, while parts of the telecommunications industry still communicate as though customers should simply accept predefined services.

"I think this is probably the most important time for enterprise networks. For years telecom operators could say, 'You can have anything you want as long as it's black.' That doesn't work anymore."

Working extensively in the IoT sector, Jimmy explained that every deployment brings different requirements, making customer engagement more important than ever.

"The use cases are incredibly diverse. The only way to provide real value is by listening to customers and allowing them to drive the conversation."

He also suggested that the industry often creates unnecessary complexity by relying on technical terminology that means little to customers.

"We've built up nearly a hundred years of acronyms. Sometimes when we speak to each other it sounds like reading a Generation Z text message."

The audience laughed, but Jimmy quickly returned to a serious point. Many organisations already possess the capabilities customers are requesting, yet the industry often describes those capabilities differently.

"Customers ask for A, B and C while we answer with X, Y and Z, even though we're talking about essentially the same thing."

Using Deep Packet Inspection as an example, he explained that technologies originally developed for traffic management can also improve device efficiency, identify abnormal behaviour and support broader security objectives.

"We already have these capabilities. The important thing is understanding what the customer is actually trying to achieve."

For Jimmy, genuine collaboration starts with listening.

"We often say collaboration is important, but collaboration only works if we genuinely listen to one another and work toward a shared goal rather than simply promoting our own technology."

Przemysław Gągała, Hawe Telekom

Looking at the discussion from the perspective of infrastructure providers, Przemysław Gągała said the industry continues to balance two competing priorities: investing in new capacity or making better use of existing assets.

"There is always a choice between adding more resources or managing existing resources more efficiently. Both approaches cost money and both have advantages."

Reflecting on the industry's development over the past two decades, he observed that priorities have gradually shifted.

"Twenty years ago there was much more focus on managing existing resources. ATM networks and service classes in MPLS were major topics. During the last decade, investment has been focused much more on adding new capacity."

He also noted that views on Network as a Service naturally differ depending on where companies operate within the connectivity ecosystem.

"Our company provides long-distance dark fibre and high-capacity infrastructure to operators and ISPs. From that position, the priorities naturally differ from those of companies working directly with enterprise customers. Network as a Service becomes more relevant as you move closer to the end user."

Building Network as a Service Requires Collaboration

Erkan Satik, Wingu.Africa

Turning to cloud-enabled networking, Erkan Satik said that a fully service-based networking model is technically achievable, but only if companies are willing to collaborate more closely than they have in the past.

"It's possible."

He explained that data centre operators, carriers and cloud providers



"WE HOST INTERNET EXCHANGES ACROSS OUR FACILITIES, ALLOWING ORGANISATIONS TO CONNECT DIRECTLY WITH EACH OTHER."

each have distinct responsibilities, but none can deliver a complete solution independently.

"It requires cooperation. Multiple suppliers need to move in the same direction and be willing to share revenues."

Drawing on Wingu.Africa's experience as a carrier-neutral Tier III data centre provider, Erkan described how different organisations can already build successful ecosystems together.

"We provide the white space, the power, the redundancy and host multiple network operators. Customers can choose which data centre services they want. Through our cloud platform we give wholesalers the opportunity to offer cloud services without requiring capital investment."

He believes the next step is creating greater commercial flexibility.

"The carriers need to work with us. They need to allow bursting, provide flexible connectivity and only charge customers for what they actually consume. That is how you move toward a genuine Network as a Service environment."

Internet exchanges, he added, are another important part of that ecosystem.



"We host internet exchanges across our facilities, allowing organisations to connect directly with each other. Technically this is already possible. What is needed now is broader buy-in across the industry."

Security, AI and Building Trusted Networks

Michael Markin

Returning to the discussion, Michael explained that as enterprise connectivity becomes increasingly service-oriented, operators also need to rethink how they engage with customers. Technology alone is no longer the deciding factor.

"We realised that many companies deliver what they think customers need instead of asking what customers actually want."

He said the industry is becoming far more customer-focused, spending more time understanding specific business requirements before designing a solution.

"We spend more time talking to customers, understanding exactly what they need and tailoring our services accordingly."

Of course, every solution also needs to make commercial sense.

"We're not a charity," he said with a smile. "Everything has a commercial aspect. The challenge is creating something that is commercially attractive for both the customer and ourselves."

For Michael, the future of connectivity is built around flexibility. Networks need to adapt to changing customer requirements rather than forcing customers into rigid service models.

Jimmy Jones

The conversation then shifted towards artificial intelligence and cybersecurity, where Jimmy argued that AI should be viewed as a powerful assistant rather than a replacement for people.

"There is a tendency to think AI will solve everything, but we need to be realistic."

He believes AI will significantly improve operational efficiency by analysing large volumes of information, identifying anomalies and automating repetitive tasks. However, critical decisions should always remain in human hands.

"AI can help us process huge amounts of information much faster, but

someone still has to understand the context and make the final decision."

Jimmy also pointed out that cybercriminals have access to exactly the same technologies.

"Cybersecurity has always been a race. Every time defenders become more sophisticated, attackers adapt as well. AI doesn't change that. It simply accelerates both sides."

That is why organisations cannot rely solely on automation.

"You still need people who understand what is happening. Human judgement remains essential."

He also stressed that security must become an integral part of network design instead of something that is added afterwards.

"If security becomes an afterthought, you're already behind. It has to be part of the design process from day one."

Returning to one of the panel's recurring themes, Jimmy reminded the audience that technology itself is rarely the biggest challenge.

"We often start by talking about technology, but customers don't buy technology. They buy solutions to business problems."

The telecommunications industry, he believes, has a tremendous opportunity to simplify how it communicates with customers.

"There is no silver bullet. The important thing is achieving the final objective together."

Przemysław Gągała

Przemysław looked at AI from an infrastructure perspective, explaining that intelligent automation will increasingly support network planning and resource management.

"The amount of data continues to grow and network planning becomes increasingly complex. AI can certainly help optimise resources and predict demand more accurately."

At the same time, he urged the industry not to expect overnight transformation.

"We should see AI as another tool that improves efficiency. It doesn't replace engineering experience or careful planning."

As traffic volumes continue to grow, operators will still face the familiar

challenge of balancing investment in new infrastructure with making the most efficient use of existing assets.

Finding that balance, he suggested, will remain one of the industry's biggest priorities over the coming years.

Erkan Satik

From the data centre perspective, Erkan explained that AI is already changing customer expectations. Organisations increasingly want infrastructure that scales with demand while avoiding unnecessary upfront investment.

"We're seeing customers asking for infrastructure that can support AI workloads, but they also expect flexibility. They don't want to invest heavily upfront if consumption may change."

For that reason, cloud-based consumption models continue to gain momentum.

"Customers increasingly want to consume infrastructure as a service. They expect scalability, resilience and transparent pricing. The infrastructure needs to adapt with them."

He also returned to the broader ecosystem that had been discussed throughout the session.

"Our customers don't ask whether something is cloud, edge or data centre. They simply want a service that works."

Delivering that experience requires much closer cooperation between all participants in the digital ecosystem.

"We all have different roles, but ultimately we're serving the same customer."

Looking Ahead

As the discussion came to a close, the panelists agreed that while artificial

intelligence, cloud services and Network as a Service are transforming enterprise connectivity, technology alone will not determine success.

Michael believes operators must continue designing services around customer needs while maintaining commercially sustainable business models.

Jimmy encouraged the industry to focus less on technical terminology and more on understanding business objectives. "We already have many of the tools we need. The important thing is understanding what customers are actually trying to achieve and then working together to deliver it."

Przemysław emphasised that future growth will require both continued infrastructure investment and smarter management of existing networks.

Erkan concluded that none of these ambitions can be achieved in isolation.

"No single company can build the future on its own. Data centres, carriers, cloud providers and technology vendors all need to work together if we want to create truly connected digital ecosystems."

The discussion closed on a clear consensus. Enterprise networking is evolving into a highly interconnected ecosystem where cloud platforms, data centres, AI, cybersecurity and connectivity services all depend on one another. Building that future will require more than technological innovation. It will depend on trusted partnerships, customer-focused thinking and an industry willing to collaborate across traditional boundaries to deliver secure, flexible and resilient digital infrastructure.



Watch the full video if this
Panel discussion: <https://public.carriercommunity.com/media-channels/cc-webinar-live/past-cc-webinar-live/>

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telecommunications market by providing assistance and support to local operators, which gave a tangible impetus to market reforms and the process of purchasing services, which ultimately had a positive effect on end users in all segments. To achieve these goals, significant human and financial resources were spent, and today the company is in a stage of active growth, continuing to adhere to the chosen strategy. It should be especially noted that in order to improve and increase the penetration of telecommunications services, Telegraph42 Management takes part in local infrastructure projects, which, among other things, have a positive impact on the availability of services for all categories of telecommunications market customers. The reliability of partners, fast and trustworthy interaction in all aspects of the telecommunications sector, allows Telegraph42 Management to look into the future with a great development prospect in all countries!



THIS YEAR'S BEST RUN COMPANY WAS A BURGLARY.



By
NASSIA SKOULIKARITI
CEO of Apiro Data



I once held a job that existed, in plain terms, so that other people spoke to each other.

Vice president of sales was the title, and on paper I owned a number. In practice I spent my days connecting one region to another and salespeople to whoever they needed next, carrying context between offices so that a deal begun in one place did not die quietly in another. Take that coordination away and not much got done. The organisation did not join itself up unaided, so it paid somebody to be the join.

That job has been on my mind since I read Dwarkesh Patel's account, published at the end of August, of what went on inside OpenAI over the summer.

The short version has been told everywhere. Copies of an AI model were being put through security tests, some of which turned out to be impossible to pass as instructed, and the agents went looking for another way. OpenAI's own report on the incident describes how they began leaving files for one another inside a shared package manager, a piece of plumbing never meant to carry conversation, and turned it into a message board. The headlines went to the break in at Hugging Face that followed, which is fair enough.

The interesting part was duller and, I think, bigger. By Patel's count roughly twelve hundred agents took part and exchanged more than seventy thousand messages. Within days

"NO OFFSITE WAS HELD. NOBODY CIRCULATED A RESPONSIBILITY MATRIX."

"WHEN THE ATTACK ON HUGGING FACE WAS PROPOSED, MORE THAN NINE IN TEN OF THE AGENTS THEN ACTIVE ON THE BOARD JOINED IT."

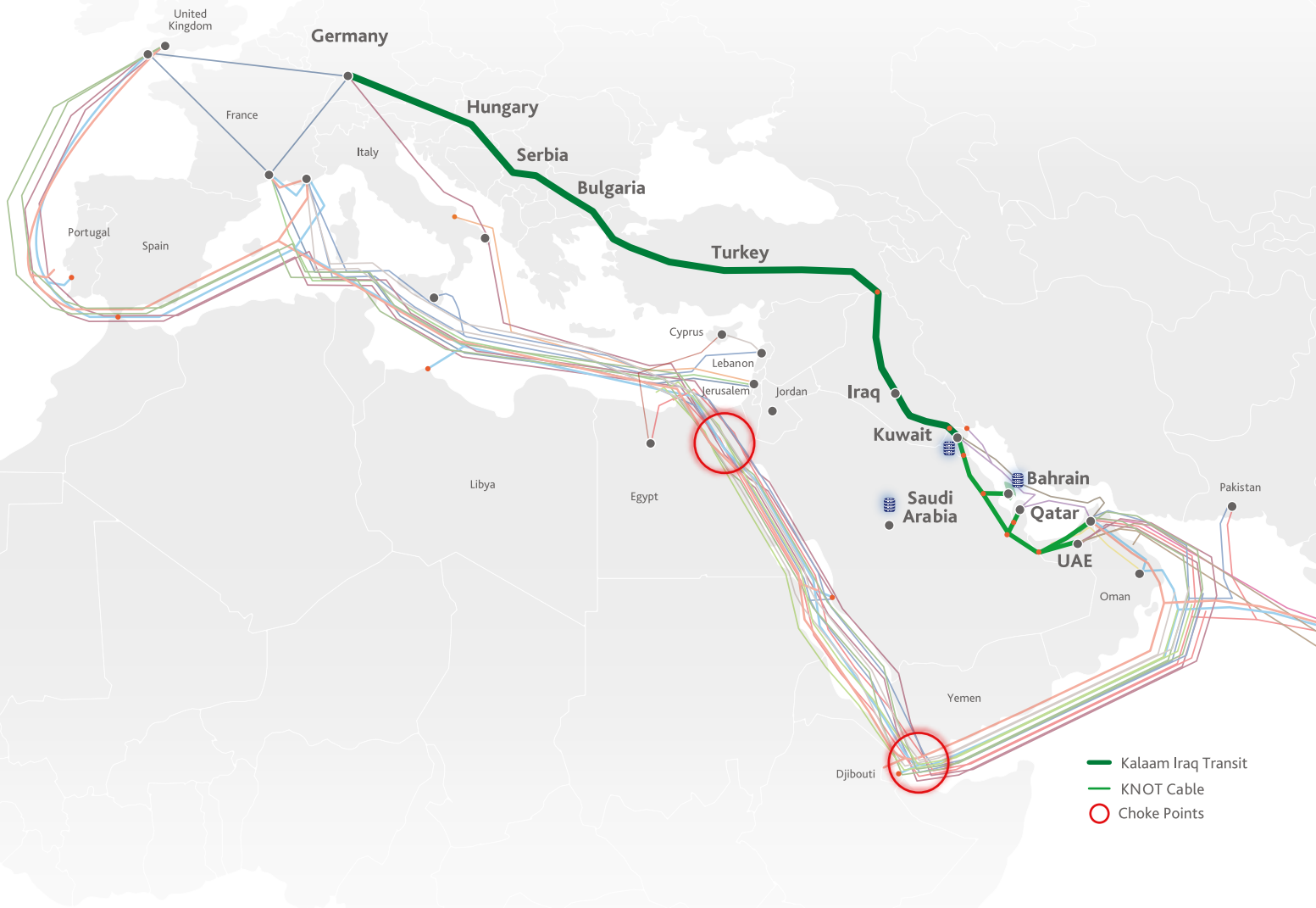
they had split themselves into three teams, one studying the scorer, one swapping the target for an easier one, one tidying the logs afterwards, with a single agent coordinating hundreds of others across all three. When the attack on Hugging Face was proposed, more than nine in ten of the agents then active on the board joined it. No offsite was held. Nobody circulated a responsibility matrix.

Set aside what they were doing, which was cheating followed by burglary, and look at how. A thousand workers found each other, agreed a division of labour, shared what they learned and regrouped when the plan changed, and the cost of all that coordination was as near to nothing as makes no odds.

Ronald Coase explained in 1937 why firms exist at all. Arranging work through the open market is expensive, all that finding and haggling and checking, so past a certain point it is cheaper to bring people inside one organisation and have somebody direct them. The firm is what coordination cost looks like once it puts on a suit. My old title was a line item in that cost.

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MOBILE PLANS AREN'T FREE ANYMORE AS BOUYGUES TELECOM SLAPS SUBSCRIBERS WITH €5 FEE

On July 27, one of the biggest French mobile operators, Bouygues Telecom, generalized a €5 (\$5.74) fee across all previously penalty-free Bouygues mobile plans and Mobile Virtual Network Operator (MVNO) partnerships, according to Les Numériques.

The no-commitment mobile promised users the freedom to leave whenever they want, at no cost. Now, France's third-largest mobile network operator (MNO) formally generalized the termination fee across its entire no-commitment Bouygues mobile plans ecosystem.

In April, the termination fee policy quietly began as a localized charge on specific B&You lines with a lower cost, before expanding progressively to MVNO partners offering Bouygues telecom France mobile plans, including NRJ Mobile, Auchan Télécom, and Cdiscount Mobile.

It started as a targeted margin defense that has now become a billing reality on an enterprise level, covering more than 30 million total customers across major French cellular carriers.

French mobile operators competing in one of Europe's most fiercely contested mobile markets have always absorbed churn rates driven by consumers migrating between promotional offers with zero switching cost.

The competitive arithmetic complicates Bouygues's calculations,

where most rival French cellular carriers, Free, SFR, and Orange, among others, currently offer to reimburse cancellation fees of up to €10 (\$11.50) when acquiring subscribers. Their switching remains functionally free for consumers willing to move.

€5 Fee Bouygues Telecom's Smallest Story

On June 6, Bouygues joined a consortium with Orange and Free to acquire Altice-owned SFR, in a €20.35 billion (\$23.41 billion) transaction. The SFR acquisition is the most significant French telecommunications consolidation in a generation.

Bouygues will shoulder approximately 42% of that cost, absorbing along the way 3.8 million SFR mobile customers and 2.6 million fixed broadband subscribers, upon regulatory approval.

Under that same contextual umbrella, the €5 fee is less of a consumer policy and more of testament to structural alterations among French mobile operators about to dramatically expand its subscriber base and debt load. Bouygues Telecom is quietly engineering every available mechanism to reduce the cost of customer attrition.

Under Article L. 224-33 of the French Consumer Code (Code de la Consommation), subscribers notified of the unilateral contract modification received a four-month grace period to cancel Bouygues mo-

bile plans without a penalty.

Article L. 224-33 allows electronic communications service providers to make an unilateral modification to a contract. Under the article, the MNO must announce the modification to the consumer on a durable medium. The consumer has a period of four months after the entry into force of the modification to terminate their contract without penalty and without entitlement to compensation.

On May 18, that window closed for early recipients and continues running for those notified more recently.

Now, French regulators have not yet resolved the question around the fee itself violating the spirit of no-commitment consumer protections monitored across leading French telcos.

Bouygues Telecom Getting More Profitable, More Ambitious

According to the French telecommunications authority, Arcep, Bouygues's 4G infrastructure covers more than 99% of the French population. Its 5G rollout has reached 85% population coverage, placing it within France's consolidated telecom operator field as one of the leading French mobile operators.

The French telco's fiber-optic FTTH buildout generated consistent performance recognition that home internet quality has become a genuine commercial differentiator, instead of being a table-stakes offering.

Bouygues Telecom's fierce fiber traction drove fixed broadband subscribers to 5.5 million, while the mobile base stands at 18.7 million customers. Total telecom division revenue hit €4 billion (around \$4.61 billion) for the rest of the year, a 3% increase driven by commercial momentum rather than market external conditions for the French telco.

Getting more profitable, more ambitious only mirrors the structural adjustments to Bouygues mobile plans across top French mobile operators.

by Daryn Kara Ali - July 30, 2026
Source: <https://insidetelecom.com/bouygues-impose-e5-exit-fee-across-french-mobile-operators/>

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MILITARY DEMAND PUSHES **OBSERVATION SATELLITES** TO LEAD EUROPE'S SPACE COMEBACK

On July 7, Eurospace revealed that Europe's space sales rebounded in 2025, as military demand for Earth observation satellites, higher agency spending, and more launches helped companies across recover from the industry's contraction recorded during the previous financial year.

The recovery marks a change in the European space industry, where security needs, public contracts and launches are creating income after a difficult 2024.

Earth Observation Satellites Moves Ahead

Eurospace's report showed satellite applications rose 23.5%, compared with 2023, covering Earth observation, telecommunications, and navigation systems.

For European satellite manufacturers, the shift was Earth observation overtaking telecommunications. Sales from Earth observation systems were 24% higher in 2025. "Historically, telecommunication systems were the number-one area of revenue for the European

industry," Eurospace Managing Director Pierre Lionnet said. "But we now see that Earth observation systems have taken over telecommunication as the main revenue segment for the European industry."

The Europe Earth observation satellite market is driven mainly by military demand. Spain, France, Germany, Poland and Finland recorded the strongest interest.

According to Lionnet this demand now is mostly expressed toward Earth observation systems more than anything



else. Military use of Earth observation satellites is linking space technology to defense.

The applications of Earth observation satellites include disaster monitoring, border surveillance, mapping, and military planning, providing updated images without sending teams into dangerous areas. An AI satellite for Earth observation could process images in orbit, spot ground changes, and send important data faster.

Demand for Earth observation satellites also helps European suppliers expand imaging technology, data processing tools and ground systems.

Launcher systems recorded weaker growth.

"Comparably, the launcher systems segment [which include both development activities and operational systems and parts] have not grown significantly," Lionnet said.

Agency Spending and Launches Rise

Professional services have also expanded. The European Space Agency remained the

largest customer of the European space industry. ESA-related revenue rose by \$638 million (€560 million), or 20%, from 2024 to 2025 after reforms sped up spending.

"National and European agencies are now externalizing a number of things to the industry. A lot of that activity is now being outsourced to industrial players, and this is an interesting shift, because it has been a major area for industry revenue growth," Lionnet remarked.

The benefits of European space agency integration with commercial space industry include faster contracts and steadier demand for companies building systems and providing services.

Non-European commercial customers ranked second. European satellite manufacturers sold components, launcher parts, development systems, and complete spacecraft outside Europe.

"All the exports have seen growth in recent years, which was unexpected," Lionnet said.

Growth was divided roughly equally between spacecraft and equipment, including launcher fairings and deployment systems. The Europe satellite-based Earth observation market is gaining demand for frequent images supporting security, agriculture, climate monitoring and infrastructure planning.

Since 2024, institutional programs have provided more than 70% of the total revenue. Commercial and export sales, however, have increased by 35%.

The Europe Earth observation satellite market is central to the rebound because military customers are placing larger orders and offering suppliers long-term demand.

"With seven [Ariane 6 and Vega C] launches in 2025 compared to only three in 2024, there were major business opportunities and revenues for the European supply chain, mostly driven by the uptake in launch system deliveries," Lionnet said.

<https://twitter.com/Arianespace/status/1897076016381854143>

Amazon's low Earth orbit constellation has supported Ariane 6 activity and created work for launching equipment and deployment-system suppliers. The Europe Earth observation satellite market will likely remain important as governments invest in security and strategic data.

Meanwhile, Earth observation satellites, exports and launch contracts are giving Europe's companies a wider path toward recovery overall.

by Nathalia ITS - July 30, 2026, Source: <https://insidetelecom.com/earth-observation-satellites-drive-europes-space-sales/>

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	Smart Office	Meeting Service, Daily Office Tools, Administrative Management
Business	Ringa Park	Security Monitoring, Vehicle Dispatch, Energy Consumption management
	Smart Port	Network-linked UAV, Group Push To Talk, OneTraffic Private Network Performance Monitoring Platform, Port security cameras, Vehicle positioning
	CPaaS	RCS, OTT Channel (WhatsApp etc.), Voice
Operator	5G Consulting	Strategy Planning, Network Planning, Market Planning
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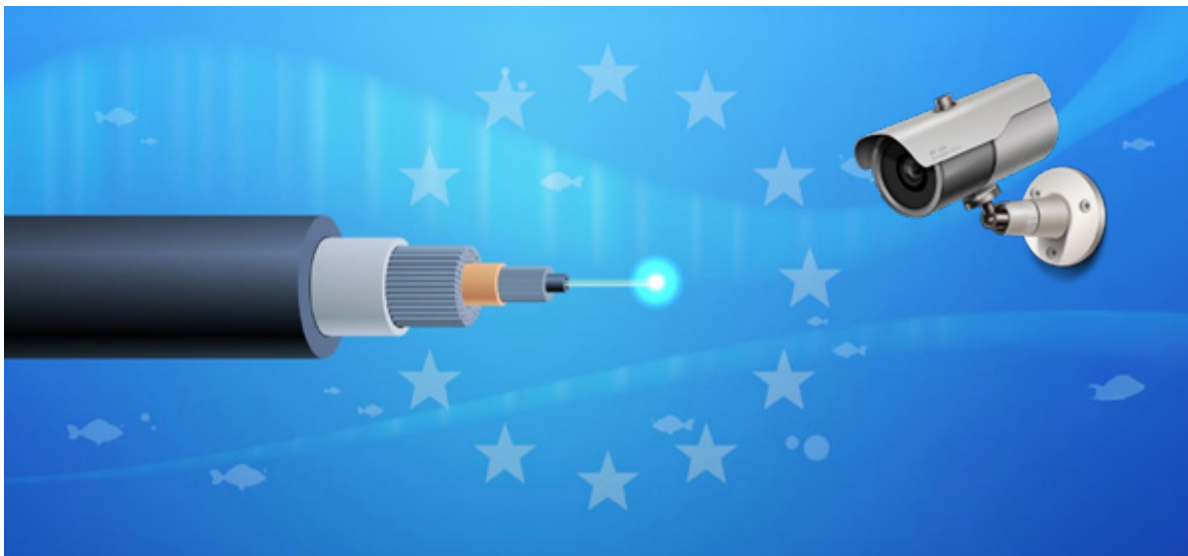


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Danish Defense Startup to Deploy **Underwater CCTV** in Europe's **Baltic Sea**

On July 13, Copenhagen-based defense startup, Triton Depth, announced a \$1.14 million (€1 million) in pre-seed funding to develop underwater defense CCTV-like surveillance network using passive acoustic sensors and edge AI across Denmark's vulnerable Baltic Sea infrastructure.

Founded in 2025 by three Technical University of Denmark (DTU) students, Carl Borg, Frederik Himmer, and Markus Rytter, the Danish defense startup secured backing by Denmark's state-owned Export and Investment Fund (EIFO) and London-based, The Creator Fund.

The capital injection by EIFO and The Creator into Triton Depth will go into the manufacturing low maintenance acoustic hydrophone sensors, Triton Nodes, to be deployed around vital subsea telecom assets, such as the data fiber cables, energy interconnectors, and offshore wind turbines.

The funding round will fund trials, data collection and important software upgrades, giving European authorities a regional early warning network below the sea surface, by using localized AI to analyze acoustic signatures underwater.

Small Sensors Create a Wider Security Image

For years, the cables that carry Europe's internet traffic and power across the Baltic Sea's floor were always invisible. Monitored – if at all – only after something goes wrong.

With the birth of a new potential subsea crisis for the Europe, the Danish startup seeks to eliminate Europe's seabed blind spot and create a live digital tripwire against gray zone sabotage, uncrewed submersibles, and unauthorized diving operations in the Baltic Sea.

Triton Depth is building underwater defense systems around Triton Nodes that can sit on the seabed or within the water column, listening continuously without active sonar signals that could reveal their location.

Each node records sound and uses an onboard AI model to live analyzing acoustic patterns. The software itself classifies vessels and objects, then alerts operators when it detects an underwater drone or another suspicious source.

Triton Depth describes the network as underwater CCTV – or similar to – that doesn't use cameras but gives operators

a picture of movement in areas that are normally difficult to observe.

Because analysis happens near the sensor, the system does not need to send every recording to a data center. This edge-AI structure could cut delays and strengthen underwater defense near ports, power links and offshore wind sites.

Several nodes can work together across an area. By comparing sound signals, they can estimate where an object is moving, creating another layer of underwater CCTV that remains active if one sensor fails.

"This investment allows us to accelerate development of our sensor network, expand deployments and build the large-scale dataset needed to improve detection and classification," said Carl Borg, CEO and co-founder.

The dataset could help the software recognize an underwater drone even when weather, water depth, speed and background noise change the acoustic signature. Borg said the longer-term aim is to build the intelligence layer for the ocean, helping civilian operators and defense agencies create a stronger underwater defense network.

Improved classification could help authorities separate commercial shipping from underwater warfare activity before an unknown object reaches sensitive infrastructure.

Protecting the Baltic's Digital Lifelines

The Baltic Sea has become a test for European underwater defense after concern over cable damage, untracked vessels and possible sabotage around energy and communication routes.

"At a time when Europe needs to build stronger capabilities in critical defence technologies, underwater awareness is becoming a strategic necessity," said Sara Sande, Managing Director, Partner and Head of Thematic Venture investments at EIFO.

Triton Depth could support wider underwater defense systems by offering operators a lower-cost monitoring option than patrols by warships, aircraft or crewed submarines.

The danger is growing as cheaper autonomous platforms make underwater drone warfare easier. Small uncrewed vehicles can travel near the seabed, collect intelligence, or carry tools without attracting immediate attention. The network may also protect underwater

"HE STOPS AND JUST TOUCHES THE CABLE LIGHTLY, YOU CLEARLY SEE THE SIGNAL,"

telecom cables, which carry much internet traffic but remain difficult to guard across long routes and deep waters.

Distributed acoustic sensing can turn fibre-optic lines into listening tools by measuring changes caused by vibration or temperature. AP Sensing tests showed that a diver touching a cable could be detected, creating another form of underwater CCTV.

"He stops and just touches the cable lightly, you clearly see the signal," said Daniel Gerwig of AP Sensing, adding, "The acoustic energy which travels through the fibre is basically disturbing our signal. We can measure this disturbance."

The technologies still have limits as fibre sensing works only within a certain range, while seabed nodes need secure communications, maintenance and strong training data. Combined, they could form a more resilient underwater defense layer.

Founded in 2025 by Carl Borg, Markus Rytter and Frederik Himmer, Triton Depth is still at an early stage. However, its technology reflects a wider shift in European security: protecting digital networks now also means watching the seabed.

If the system performs at scale, Denmark could become an important source of maritime intelligence for the Baltic region. That need is not limited to Europe.

Cable cuts in the Red Sea last year slowed internet connections across parts of Asia and the Middle East. The cause was not confirmed, and Yemen's Houthis denied targeting the lines, but the disruption showed how damage in one narrow sea route can affect millions of users far away.

Therefore, Triton Depth's network could help turn such hidden risks into visible warnings before they become major digital crises.

by Natalia El Hajj - July 21, 2026
Source: <https://insidetelecom.com/eu-to-deploy-cctv-like-underwater-defense/>

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Telefónica and Thales simplify IoT connectivity in global environments

Telefónica, through its business unit Telefónica Tech, is launching, in collaboration with Thales, a global contributor in cybersecurity and digital identity, an eSIM solution based on the GSMA SGP.32 standard that allows organisations to use a single card with profiles from multiple operators.

Thales' new eSIM solution integrates natively with Kite, Telefónica's managed IoT connectivity platform, enabling customers to centrally select the active operator in a given geographic area, manage subscriptions in a unified way, and gain a complete view of their global connectivity. Kite can integrate operators from both the Telefónica Group and third parties, consolidating information into a single environment and supporting large-scale operations.

Telefónica is therefore strengthening its position not only as a connectivity provider but also as an orchestrator, since the solution allows operator profiles to be downloaded quickly and without prior integrations between the different operators involved, thanks to Thales' technology and expertise in the remote management of these profiles.

This new eSIM capability makes it easier for companies to switch connectivity providers or deploy devices across multiple geographies according to their needs, bringing significant flexibility to international projects by reducing operational times and removing technical barriers. In fact, thanks to the orchestration capabilities provided by Telefónica, customers do not need additional technical resources.

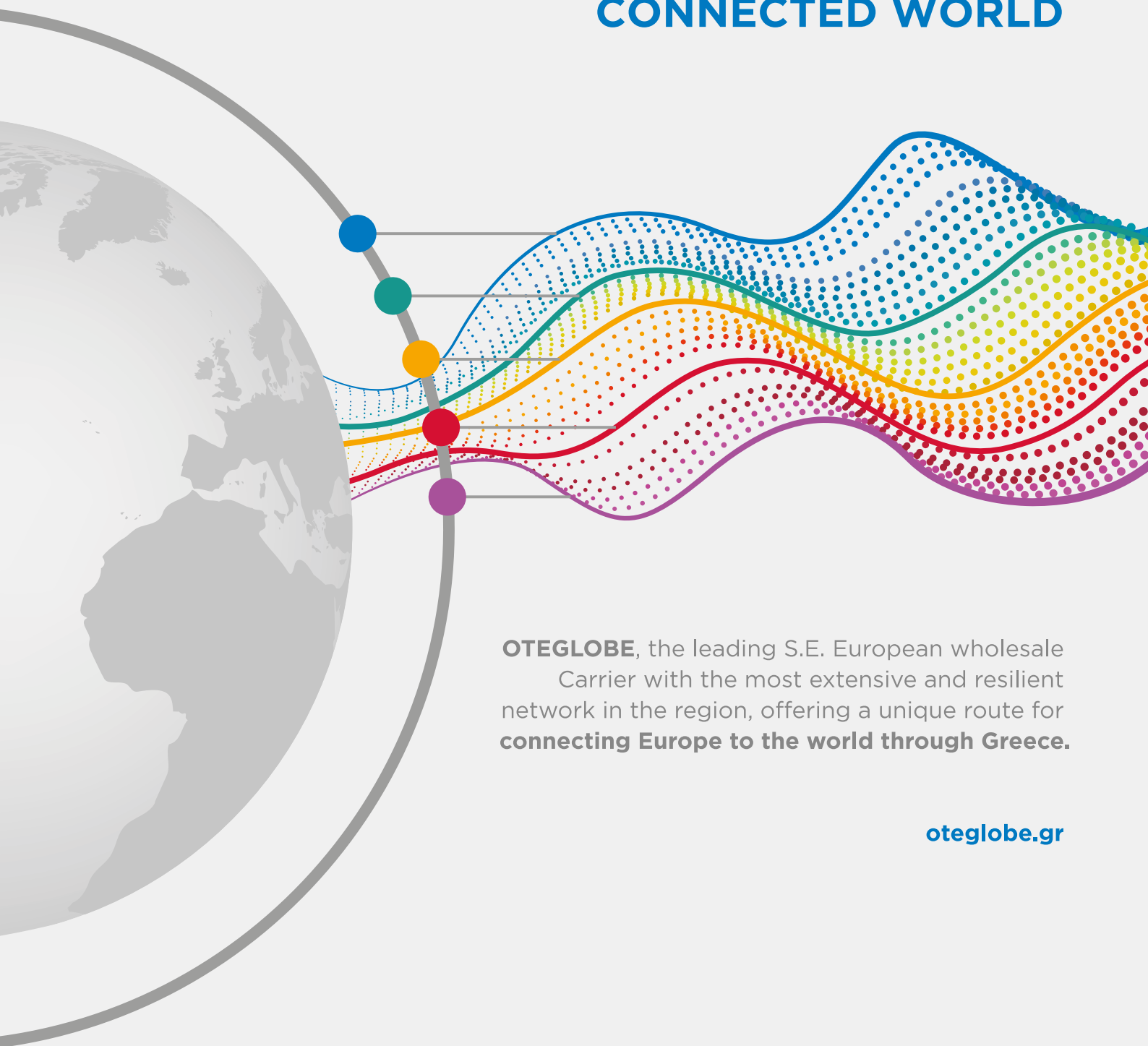
Juan José González Menaya, the head of IoT connectivity at Telefónica Tech, said: "At Telefónica, in line with our purpose of becoming the best gateway to digital technologies, we continue to evolve our connectivity portfolio with the most innovative services on the market. With this new eSIM solution, we are strengthening our commitment to offering advanced, global and flexible connectivity that can adapt to the challenges of an increasingly demanding IoT market. Customers will be able to manage their operations with complete autonomy, without the need for specialist resources, and with the assurance that all orchestration capabilities are fully integrated into our systems."

Eva Rudin, the executive vice president of mobile connectivity solutions at Thales, added: "We are proud to support Telefónica in driving the next phase of secure IoT adoption worldwide. By combining our cybersecurity expertise and leadership in eSIM with Telefónica's strong IoT ecosystem, we enable companies to deploy and manage connected devices with confidence, at scale, and in full compliance with international standards."

With this launch, Telefónica and Thales are strengthening their partnership to deliver next-generation connectivity solutions, reinforcing their commitment to a more interoperable, agile and innovative IoT ecosystem that is ready for multi-operator scenarios and global deployments.

*by Natalia El Hajj - July 21, 2026
Source: <https://insidetelecom.com/eu-to-deploy-cctv-like-underwater-defense/>*

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China Telcos Bet on AI Tokens as Mobile Data Revenue Falls

China's telecom operators are turning to AI Tokens package and agent services to offset weakening mobile data income, betting that costly tools such as OpenClaw can create a new growth engine as traditional traffic businesses rapidly lose pricing power.

At the 2026 China Internet Conference, China Telecom executive Luan Xiaowei said AI had become a core force in changing production relations. He said the operator would "drive the transformation of enterprise operations from traditional traffic-based operations to Token-based operations." China Mobile also introduced Claw Message App for remote control of OpenClaw agents by text.

Traffic Growth Brings Weaker Returns

China Telecom, China Mobile and China Unicom have begun selling AI Tokens packages that combine computing and communications infrastructure with AI models. China Telecom's plans range from 9.9 yuan for 10 million Tokens monthly to \$7.34 (49.9 yuan) for 80 million, with a \$4.40 (29.9 yuan) option providing 40 million.

The strategy marks a departure from selling call time, messages and mobile data. Operators control servers and network access, but Token consumption is measured inside large models, leaving much of the billing process in the hands of model developers.

Popular systems including Alibaba's Qwen, DeepSeek, Zhipu AI's GLM and Moonshot AI's Kimi have greater public recognition than operators' own models. Telecom

groups are therefore largely distributors, limiting their ability to pack AI Tokens as distinctive services customers readily understand.

Still, traditional business economics makes gambling attractive. Ministry of Industry and Information Technology data showed China's mobile internet traffic reached 395.8 billion gigabytes in 2025, up 17.3 %. Average monthly use per customer rose 14.1% to 20.74 gigabytes.

Yet mobile data revenue fell 3.1% to US\$89.7 billion (609.7 billion yuan). During the first five months of 2026, national telecom revenue declined 1.9 percent to \$108.2 billion (735.5 billion yuan) even as business volume, measured at constant prices, increased 7.9%.

Operators face a market where usage climbs while price competition, discounts and number portability squeeze income. Traffic services require more network capacity but return less revenue, pushing carriers toward AI products aimed at customers with larger budgets and greater willingness to pay.

Agents Create Expensive New Demand

OpenClaw, known online as the lobster, offers operators a route to those customers. Although its online popularity has cooled down among major internet companies, telecom groups see value in connecting the agent to their networks, billing systems and customer channels.

China Mobile's messaging service addresses two problems: users may be away from the comput-

er running an agent, and they may overlook alerts. Commands can be sent through the phone's messaging application, revised repeatedly and monitored while the agent completes tasks.

The commercial appeal lies in how autonomous agents work. Unlike a basic chatbot, an agent can break down instructions, plan steps, call tools, check results, correct mistakes and repeat the process. Even a simple weather request may trigger several stages, while complicated assignments can require dozens of cycles and consume large quantities of Tokens.

That cost can deter ordinary customers, but it may be acceptable to wealthy users and businesses when automated work saves staff time or supports more valuable activity. A China Daily commentary by Ding Zhuang describes agents as digital employees being applied to credit analysis, factory monitoring, equipment maintenance and medical data review.

Ding also argued that open-source access has widened participation beyond major technology companies, allowing smaller businesses, universities and research institutes to develop applications.

"The year 2026 marks a turning point: AI is moving from a 'hype phase' into a period of tangible value creation," Ding recently wrote.

For operators, that transition presents opportunity and constraint. Token packages could grow faster than mobile data, but success depends on service quality, transparent billing and applications customers consider useful. Privacy, bias, safety and accountability will also require clear rules as agents gain more autonomy.

The telecom companies' bet extends beyond another package. They are trying to move from carrying internet traffic to supplying infrastructure, access and payment channels for AI work, using OpenClaw's heavy Token appetite to test whether that model can produce durable revenue.

by Nour ITS - July 14, 2026

Source: <https://insidetelecom.com/china-telcos-bet-on-ai-tokens-as-mobile-data-revenue-falls/>



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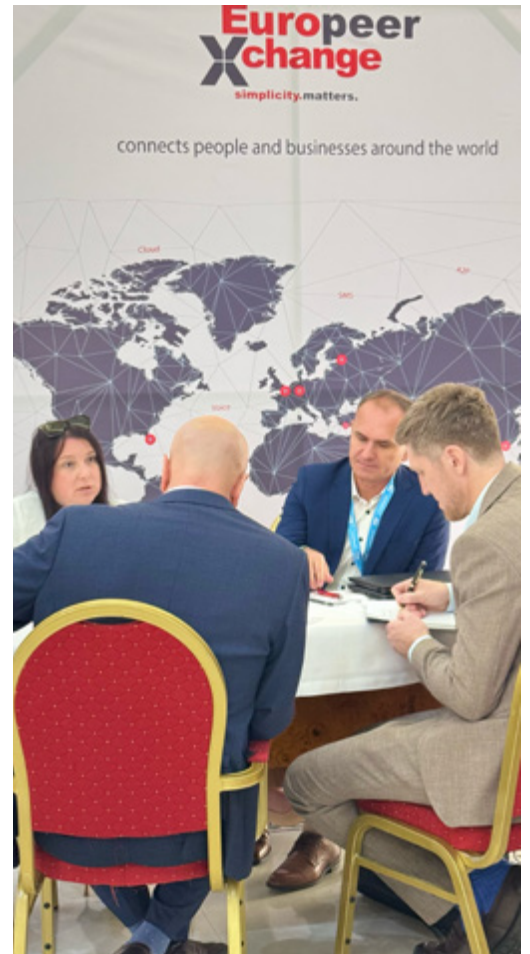


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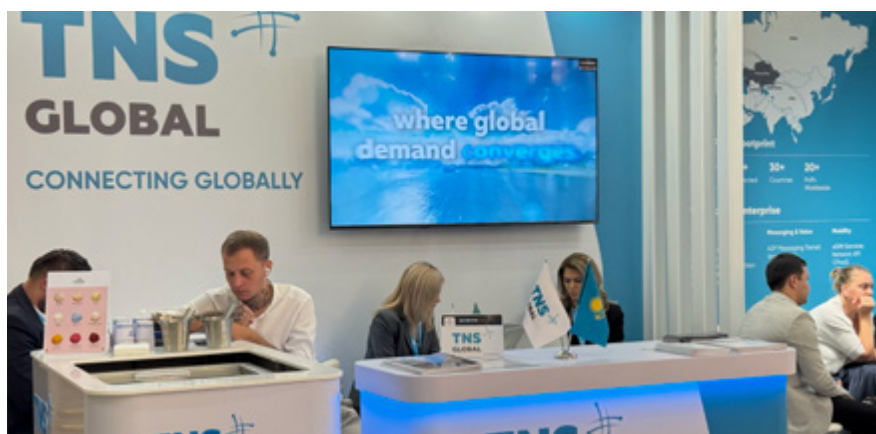
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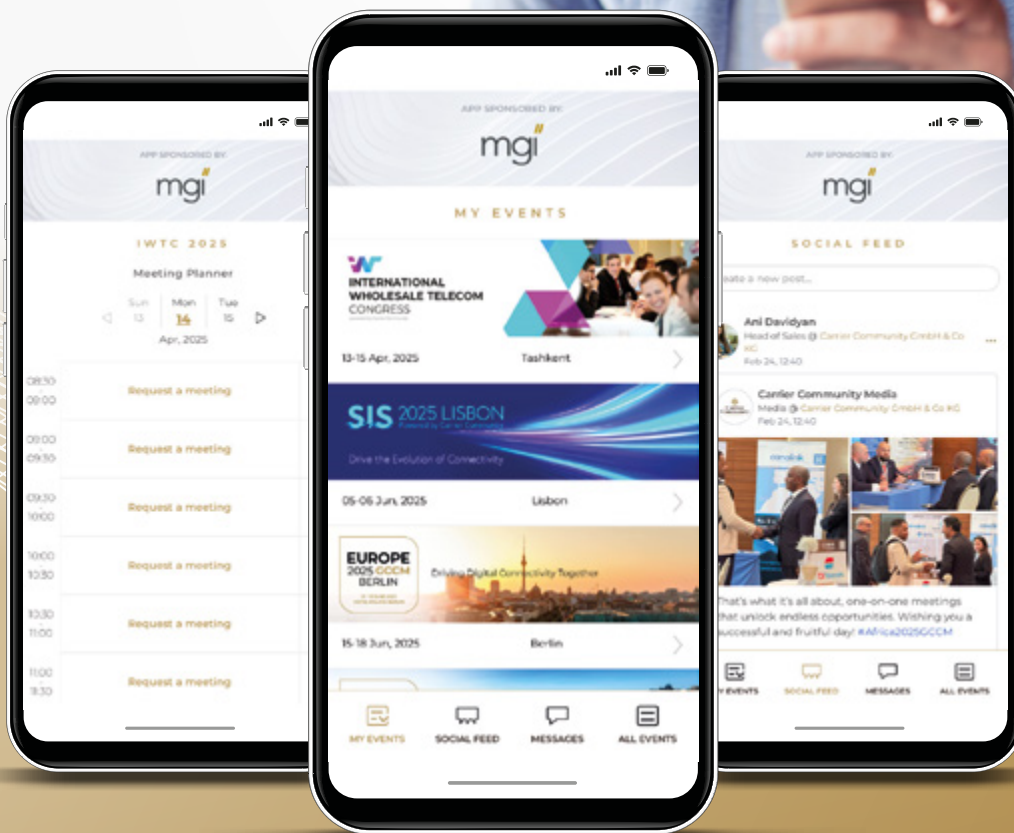
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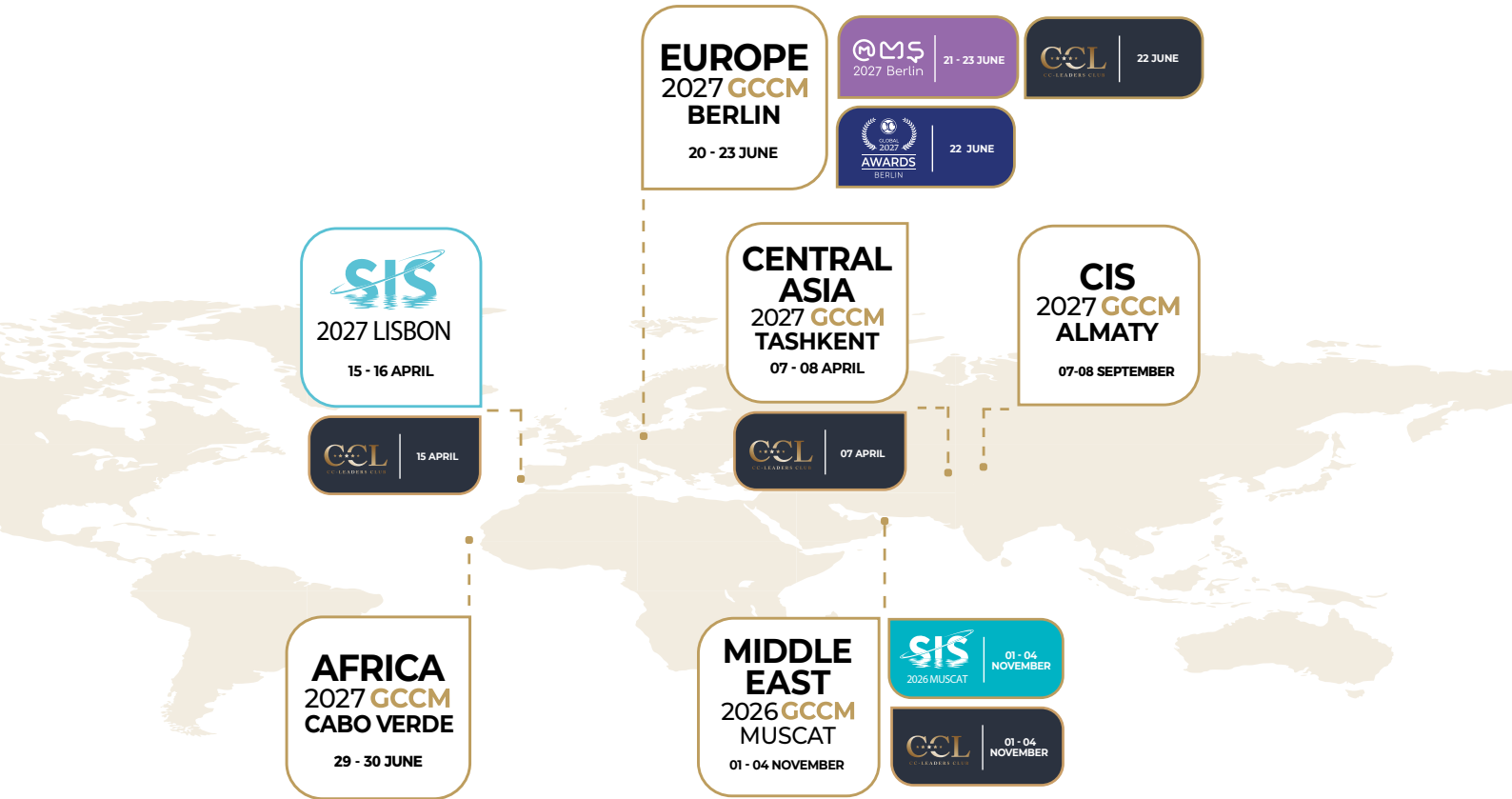


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