GCCM MAGAZINE

Carrier Community
Global Telecom Club

ISSUE 93, OCTOBER/NOVEMBER 2026

The Power of W

Women in Wholesale



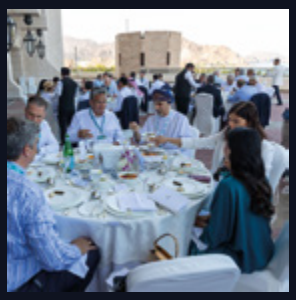
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Carrier Community
Global Telecom Club



Collaborating Today, Leading to Transform Tomorrow








About CCL CLUB

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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EDITOR'S LETTER

Dear Valued GCCM Magazine Readers, Welcome to **Issue 93 of GCCM Magazine**, our Middle East 2026 edition and one of our most insight-packed issues to date. Across these pages, we bring together executive interviews, keynote articles, industry news, and thought leadership exploring the technologies, partnerships, people, and strategies shaping the next chapter of global connectivity.

We are especially proud to feature **Zain Omantel International (ZOI) and "The Power of W: Women in Wholesale"** on the cover of this issue. At a time when resilience is becoming increasingly important across the global connectivity landscape, ZOI offers a broader perspective on what resilience really means. Beyond networks and infrastructure, it is also built through people, diverse perspectives, strong leadership, and the ability to challenge established ways of thinking.

Through the voices of women across ZOI, our cover story explores how diversity of thought is contributing to a more resilient, agile, and connected future. From network resilience and the Middle East's growing role as a global digital hub to AI, customer experience, leadership, and professional development, these women share their perspectives on an industry undergoing profound change. With **40% of ZOI's female employees holding leadership positions**, the feature also highlights the importance of creating meaningful opportunities for women to influence decisions, grow professionally, and help shape the future of wholesale telecoms. As ZOI puts it, different perspectives lead to better questions, better decisions, and ultimately greater resilience.

Another highlight is our **Keynote Article with Axon Partners Group**, featuring **Dikmen Edgu, Partner, and Ahmed Mosa, Senior International Connectivity Expert**. Following a CCL Club members' breakfast discussion in Muscat, they introduce Axon's first **Digital Hub Index**, examining what it truly takes for a market to become a leading digital hub. Their perspective is particularly timely: the Gulf possesses significant geographic, financial, and energy advantages, but converting those strengths into global digital leadership will depend on greater interconnection, regulatory alignment, and coordinated development across the region. The question is no longer whether the Gulf can become a digital hub, but whether it will lead or lag.

Partnership is another important theme throughout this edition. In his **Keynote Article, "Partnership as a Driver of Growth," Eugenio Pradas, SVP Global Strategic Development at BTS**, reflects on the message he shared at the CCL Summit 2026 in Berlin. Drawing on BTS's experience with strategic alliances, he highlights how collaboration, technology, connectivity, and, importantly, people can create new opportunities for growth across voice, messaging, cloud numbering, and emerging AI-enabled services.

These are just some of the many perspectives featured in an issue filled with **in-depth interviews, keynote contributions, company news, industry developments, and thought-provoking insights** from across the international telecom and digital infrastructure ecosystem.

As our industry becomes more interconnected and increasingly shaped by AI, infrastructure investment, resilience, and new business models, the value of exchanging ideas and learning from one another has never been greater. Issue 93 reflects exactly that spirit, bringing together different voices and perspectives from across our global community.

A sincere thank you to **ZOI**, all our contributors, partners, and the wider Carrier Community for continuing to share your expertise, experiences, and vision with us. Your contribution makes GCCM Magazine a platform where the industry can exchange knowledge, celebrate progress, and look ahead together.

Enjoy the issue!

Warm regards,

Wida Schmidt



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.

To become a member please visit:
carriercommunity.com

To find out more about CC- Events, please visit:
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CONTACT:

Carrier Community GmbH & Co. KG
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Global Carrier Connectivity Meeting

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BROADNET AT AT MIDDLE EAST 2026 GCCM & SIS SUMMIT

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CONNECTIVITY BUILDS NETWORKS. PARTNERSHIPS BUILD BUSINESS.

Connectivity is often measured in capacity, coverage, and speed. Its real value, however, is measured by what it makes possible: businesses reaching customers, operators entering new markets, and partners creating opportunities that did not exist before
.
From November 1-4, 2026, BroadNet will participate in the Middle East 2026 GCCM & SIS Summit in Muscat, Oman. The team will connect with carriers, operators, infrastructure leaders, technology providers, and decision-makers working across the global telecom ecosystem.

Organized by Carrier Community, the event brings the Global Carrier Connectivity Meeting together with the Submarine, Digital Infrastructure & Satellite Summit. Its agenda covers messaging, mobile, fiber connectivity, cloud, data centers, peering, subsea infrastructure, satellite, artificial intelligence, and the technologies supporting the next phase of digital growth.
For BroadNet, participating in the summit is about turning industry conversations into clear business possibilities. Visitors can meet the BroadNet team to discuss wholesale messaging and global connectivity, strategic carrier and operator partnerships, scalable A2P SMS, AI-powered voice and messaging experiences, omnichannel customer communication, and opportunities to expand into new markets.

Behind every connection is a real business need. An enterprise may need to authenticate a customer instantly. A carrier may be looking for a reliable international messaging partner. A company entering a new market may need the reach and technology required to communicate at scale. BroadNet connects these needs with dependable messaging, intelligent technology, and partnerships built to support real business growth.
Carriers need more than introductions. They need partners who understand the commercial and technical realities behind every connection. That is the kind of conversation BroadNet wants to have in Muscat.

The summit arrives at a time when the telecom industry is facing important questions: how operators can respond to growing cross-border data demand, where AI can deliver meaningful improvements, how carriers can expand without compromising quality, and which partnerships can create long-term value rather than short-term volume.
Throughout the event, the BroadNet team will reconnect with established partners, meet new industry leaders, and explore practical opportunities for collaboration across messaging, AI-powered communication, and international connectivity.

For BroadNet, Middle East 2026 GCCM & SIS Summit is an opportunity to go beyond introductions and focus on what companies can achieve together. If you are attending the event in Muscat, connect with the BroadNet team and bring your priorities, challenges, and next market opportunity.

Connectivity builds networks, but the right partnerships build business.

Contact BroadNet
Meeting requests: events@broadnet.me
Website: www.broadnet.me



Carrier Community (CC), the global telecom club founded in 2008, has marked another remarkable year of international events, bringing together telecom and digital infrastructure leaders across Europe, Central Asia, Africa, and the Middle East. Throughout 2026, CC's global event portfolio continued to provide a trusted platform for business development, knowledge exchange, industry collaboration, and new partnerships across the connectivity ecosystem.

The year began in London with the **18th annual Global Carrier Connectivity Meeting (GCCM)** alongside the **Mobile & Messaging Summit (MMS), held on March 23rd and 24th** at Convene 200 Aldersgate, St. Paul's. The two-day gathering brought together the international wholesale telecom and messaging communities for high-level networking, discussions, and new business opportunities.

April continued with two major CC gatherings. From **April 13th to 15th**, the **Subsea, Digital Infra & Satellite (SIS) 2026 Summit – Lisbon, Cascais** welcomed global leaders at the Hotel Cascais Miragem Health & Spa. Participants joined from Africa, LATAM, Asia, Europe, and beyond to exchange perspectives on subsea infrastructure, digital connectivity, data centers, satellite, and the technologies shaping the future of global networks.

Later that month, CC hosted the **Central Asia 2026 GCCM** in Tashkent from **April 22nd to 23rd** at the Azimut Grand Hotel Tashkent. The event provided a strong business enablement platform for the regional and international telecom community to connect, exchange knowledge, and explore new opportunities across Central Asia. The **CCL Summit** was also held in Tashkent on April 22nd, bringing together CC-Leaders Club members, industry partners, and senior executives for focused discussions and collaboration.

June represented one of the busiest periods of the CC calendar. The **13th annual Europe 2026 GCCM Berlin**, held from **June 14th to 17th** at Hotel Palace Berlin, welcomed **more than 1,000 delegates from 350+ companies across 77+ countries**. Hundreds of one-on-one meetings, executive panels, keynote presentations, and networking activities



explored developments across AI, cloud, cybersecurity, digital infrastructure, mobile, messaging, wholesale services, and next-generation connectivity. The event also achieved strong digital reach, generating **more than 90,000 online views and interactions** across CC media channels.

Running alongside GCCM, the annual **Mobile & Messaging Summit (MMS) 2026 Berlin** brought together MNOs, aggregators, messaging specialists, enterprises, and technology providers, while the **CCL Summit 2026** provided another dedicated forum for senior industry leaders. Berlin also hosted the milestone **10th Anniversary Edition of the Carrier Community Global Awards (CCGA) 2026**, recognizing outstanding achievements, innovation, and leadership across the global telecom and digital infrastructure ecosystem.

Later in June, CC headed to Cape Verde for the **Africa 2026 GCCM**, held from **June 23rd** to 25th at the Hilton Cabo Verde Sal Resort. The gathering connected regional and international operators, carriers, hyperscalers, satellite companies, mobile operators, data centers, ISPs, messaging providers, technology companies, and other ecosystem partners for three days of networking, knowledge sharing, and business development, further strengthening CC's engagement with the African connectivity market.

As 2026 moves towards its conclusion, CC is now preparing for its final major gathering of the year: the **13th Middle East 2026 GCCM** and **SIS 2026 Summit Muscat**, taking place from **November 1st to 4th, 2026**. Together with the **CCL Summit**, the event is expected to welcome **1,000+ CC Club Members** and representatives from **200+ Tier-1, Tier-2, and Tier-3 operators**, creating one of the region's major meeting points for the wholesale telecom and digital infrastructure community.

Muscat will also feature the **CMA'26 – Community Members' Awards**, powered by Carrier Community, a special initiative recognizing individuals whose leadership, commitment, and contributions continue to inspire and create a positive impact across the global CC ecosystem.

From London and Lisbon to Tashkent, Berlin, Cape Verde, and Muscat, **2026 has demonstrated the strength and reach of the Carrier Community network**. Each gathering has created new opportunities for members to meet, share expertise, develop partnerships, and contribute to the continued evolution of the global telecom and digital infrastructure industry.

CC extends its sincere appreciation to its **members, sponsors, partners, speakers, moderators, exhibitors, and industry collaborators** whose trust, engagement, and continued support have made the 2026 journey possible.

With an exciting international calendar already ahead, **Carrier Community looks forward to welcoming its members and partners to its 2027 events** and continuing to connect the people and companies shaping the future of global connectivity. Together with our **11,000+ members and partners**, we remain committed to advancing digital connectivity and building the **AI-powered, intelligent, and resilient networks of the future together**.

For further information about Carrier Community, upcoming 2027 events, or partnership opportunities, please contact info@carriercommunity.com.

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CC-Executive INTERVIEW With

Enrico Bagnasco

Chief Executive Officer
at Sparkle

SPARKLE



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THIRTY YEARS UNDER THE WAVES: HOW SPARKLE'S SEABONE GREW INTO A GLOBAL TIER-1 BACKBONE

In September 1996, when most households were still getting acquainted with the dial tone of an analogue modem, a network with big ambitions went live between Milan, Palermo, Miami and Montreal. Its first links ran at 45 Mbps - a speed that today wouldn't stream a single video call. Thirty years later, that network, **Seabone** (AS 6762), has become one of the **world's top Tier-1 Internet backbones**, and **Sparkle** is marking the anniversary with a global celebration.

From dial-up to the AI era

Seabone's growth mirrors the Internet's own transformation. What began as a handful of transatlantic links has become a fully redundant, proprietary fiber-optic network spanning **more than 600,000 km** across Europe, Africa, the Americas and Asia. Today it connects **over 600 customers through 126 PoPs** and Telehouses worldwide, ranks as the 7th Tier-1 network globally, and leads the field across the Mediterranean, Africa, the Middle East and Latin America - regions where reliable, low-latency access to the Big Internet has never mattered more.

The technical leap is just as striking as the geographic one. Seabone now supports port speeds of **up to 400 Gbps** at its edge, giving ISPs, hyperscalers and content providers the headroom to scale alongside the demands of cloud computing, video streaming, gaming and, increasingly, AI-driven workloads: traffic patterns that would have been unimaginable to the engineers who lit those first 45 Mbps circuits.

Running it all is a dedicated **24/7 Global Network Operations Center**, which keeps performance monitoring, fault management and customer support running around the clock - an essential piece of infrastructure for a network that has effectively become critical plumbing for the modern Internet.

A network built on customer needs

This anniversary is an opportunity to celebrate but also to reinforce Seabone's value proposition for what customers need next. Among its features, a remarkable addition is the **Fast Delivery** provisioning option available across all major global hubs that cuts service activation down to 24 hours, a significant acceleration for operators used to traditional lead times, and a direct response to how quickly connectivity requirements can now shift.

"THIRTY YEARS AGO, SEABONE WAS BORN WHEN THE INTERNET WAS STILL IN ITS EARLY STAGES,"

This new option complements an already broad service portfolio, including **DDoS Protection** (delivered through three scrubbing farms and a mitigation platform capable of cleaning up to 260 Gbps of traffic) and **Virtual NAP**, which gives customers virtual access to major Internet Exchange Points without the capital cost of building out their own infrastructure.

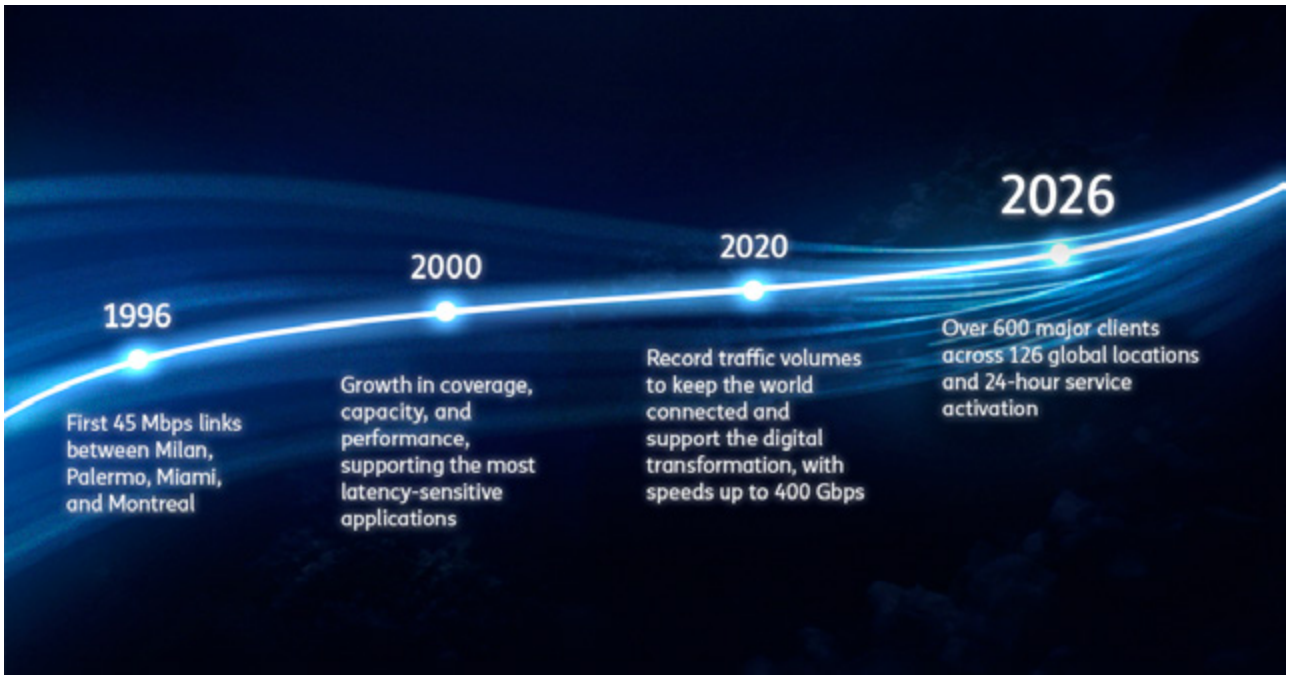
*"Thirty years ago, Seabone was born when the Internet was still in its early stages," said **Enrico Bagnasco**, CEO of Sparkle. "Since then, it has continuously evolved to accompany and anticipate the transformation of the digital landscape, expanding its reach, enhancing its performance and introducing new capabilities to meet changing customer needs. Today, Seabone is one of the world's leading Tier-1 Internet networks, connecting businesses and digital ecosystems across the globe."*

Marking the milestone

To celebrate, Sparkle has launched the **communication campaign** Seabone: Shaping the Internet of Tomorrow. Since 1996 spanning press, digital channels and social media and built around a dedicated 30 Seabone visual identity. The press component includes articles featured on leading international trade publications while the digital and social media campaign focuses on the network's key milestones together with customer testimonials.

Sparkle is also backing the anniversary with a **dedicated promotional offer** on Seabone Full IP Transit, available at any PoP worldwide with a minimum 12-month term. New customers signing up before February 2027 benefit from waived activation fees on 10G and 100G circuits, plus DDoS Protection at half the standard monthly recurring charge for the first six months. The offer extends to Seabone's new 24-hour Fast Delivery at a first set of key hubs, including Milan, Frankfurt, Lisbon and McAllen.

Three decades in, Seabone's story is less about a single network's longevity and more about what it takes to stay ahead of Internet growth, shaping the Internet of tomorrow.



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Market	Key Solution	Key Features
Consumer	JegoTrip	Customer Benefit
Home	Smart Home	AI Care, Health Elderly Care, Home Storage
Business	Smart Office	Meeting Service, Daily Office Tools, Administrative Management
	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
	Omni-Channel Firewall	SMS, OTT Messages, Voice
	5G Energy Saving	Support Multiple Frequency Spectrum, Multiple Vendors



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The Power of W: Different Perspectives. Greater Resilience.

A Zain & Omantel Company

In a global connectivity market shaped by rapid technological change, AI-driven demand and evolving geopolitical dynamics, resilience has become about more than networks and infrastructure. At Zain Omantel International (ZOI), it is also about people: bringing together different perspectives, experiences and expertise to challenge the status quo, create innovative models, and deliver the best customer experience.

As the international wholesale joint venture of Zain Group and Omantel, ZOI is reshaping how global end-to-end connectivity is designed, delivered and managed.

As part of Zain Group's Inclusion, Diversity and Equity department's commitment to advancing women in leadership, three women from ZOI joined the WE SUCCEED Program, delivered in partnership with London Business School.

The program strengthened participants' confidence, executive presence, strategic thinking, stakeholder influence, and readiness for broader leadership responsibilities through interactive learning, 360-degree assessments, group coaching, leadership simulations, and peer learning.

Across ZOI, women in leadership roles bring their own expertise and perspectives to a common objective: building a more resilient, agile and connected future. 40% of ZOI's female employees hold leadership positions, demonstrating strong representation of women in leadership across the organization.

Resilience Should Be Invisible

In today's market, customers ultimately judge resilience through something simple: whether their service works when circumstances do not go according to plan.



For **Hana Al Bahar, Head of Roaming Operations**, the best network resilience is something customers should take for granted.

"A truly resilient network is one that is always trusted by the customer. Resilience is not about what happens when everything goes according to plan; it is about how you maintain seamless operations and performance when things do not go according to plan."

ZOI combines diverse terrestrial and subsea connectivity corridors with operational expertise, creating alternatives that reduce dependency on congested or vulnerable routes. Yet technology alone does not create resilience.

"THROUGHOUT MY CAREER, I HAVE LEARNT THAT RESILIENCE IS BUILT LONG BEFORE IT IS TESTED."

"Throughout my career, I have learnt that resilience is built long before it is tested. It comes from anticipating

risks, strengthening partnerships, and ensuring the right foundations are in place to adapt as technology, customer expectations, and market demands evolve. It reflects a broader philosophy: when disruption occurs, the ability to adapt, collaborate and act quickly becomes just as important as the network itself."

From Strategic Geography to Global Digital Leadership

The Middle East sits at the crossroads of Asia, Europe and Africa, creating an opportunity to play a larger role in global connectivity.



For **Huda Al Ghabshi, Director, Connectivity Solutions**, the next chapter is about moving beyond standalone services towards building a connected ecosystem.

"THE MIDDLE EAST HAS A UNIQUE OPPORTUNITY TO BECOME A GLOBAL CONNECTIVITY BRIDGE BETWEEN ASIA, EUROPE AND AFRICA."

"The Middle East has a unique opportunity to become a global connectivity bridge between Asia, Europe and Africa. With its strategic geographic position, growing digital economy, hyperscaler investments, data centre deployments and expanding subsea cable infrastructure, the region can evolve from being primarily a connectivity transit point into a major digital interconnection hub."

ZOI, through collaboration with its licensed shareholders and group operating companies, is developing diverse terrestrial and subsea connectivity to support that evolution, including alternative routes connecting the Arabian Gulf region to Africa, Asia and Europe, and extending all the way to Australia.

But Huda believes success is not measured by growth alone:

"The opportunity is not only about building more cables and capacity, but about creating diverse, resilient and intelligent connectivity corridors that provide alternative routes, reduce latency and strengthen global digital resilience."

ZOI is positioning its network around the requirements of cloud and AI through a hybrid subsea-terrestrial mesh designed to provide route diversity, redundancy and low-latency connectivity.

AI Will Change How Our Industry Operates

If geography shapes connectivity paths, AI could transform how connectivity decisions are made in the future.



For **Alaa Al Ghanim, Manager, Preferred Accounts Roaming**, AI

will not change the fundamental purpose of international connectivity, but it could transform the speed and intelligence with which it is managed.

"TODAY, MANY DECISIONS IN OUR INDUSTRY ARE DRIVEN BY HISTORICAL DATA, FORECASTS, AND LENGTHY NEGOTIATIONS".

“Today, many decisions in our industry are driven by historical data, forecasts, and lengthy negotiations. AI has the potential to transform this by analysing traffic patterns, predicting demand, assessing network capacity and generating real-time insights that help operators make faster and smarter commercial and technical decisions.”

Alaa sees particularly interesting possibilities for the international roaming business, where long negotiation cycles and fixed commercial structures could eventually become more dynamic, redefining the decision-making process.

“I can envision a future where international connectivity operates more like a stock market, with rates and opportunities responding dynamically to real-time demand, network conditions and market dynamics.”

Yet people remain fundamental.

“AI can help us make better decisions and move faster, but people will continue to create opportunities, solve complex challenges and build the collaborations that drive our industry forward. Ultimately, I see AI as an enabler, not a replacement.”

Different from the Inside

What customers experience externally often reflects what happens within an organisation. For **Khulood Al Hosni, Marcom & Growth Expert**, ZOI’s external proposition begins with its unique internal culture.

“What truly sets ZOI apart is its people. The transparency, trust and collaboration within our teams shape how we engage with customers, partners and the market. When people are empowered internally, it naturally translates into stronger relationships externally.”

ZOI’s model offers customers clear



accountability instead of multi-supplier complexity through empowered teams, unified escalation, and people who can respond quickly and effectively when challenges arise.

"WHEN EMPLOYEES FEEL TRUSTED, EMPOWERED AND ALIGNED, IT CREATES A SHARED SENSE OF PURPOSE."

“When employees feel trusted, empowered and aligned, it creates a shared sense of purpose. That ambition, ownership and commitment become part of every customer interaction and every partnership we build. This is one of ZOI’s key strengths, enabling us to become a well-recognised brand and industry leader in such a short span of time.”

Differentiation, therefore, is not only about networks or services. It is about creating an environment where people succeed together and bring that same mindset to customer relationships.

Leadership Without Ego

As the industry evolves, leadership must evolve with it.

For **Sarah Narag, Head of Billing & Receivables**, intellectual humility is becoming increasingly important.





"THE PACE OF CHANGE IN TELECOM HAS MADE THE IDEA OF A SINGLE LEADER HAVING ALL THE ANSWERS OBSOLETE."

“The pace of change in telecom has made the idea of a single leader having all the answers obsolete. We need the self-awareness to know what we don’t know, ask the right questions, and use the expertise around us to make the best-informed decision possible.”

That also means having the confidence to recognise when something is no longer working.

“We also need the courage to call time on something that is no longer working, particularly when we were the ones who backed it. That requires putting ego aside. Strong leadership is not about always being right; it is about recognizing when the facts have changed, learning quickly, and adapting decisively to stay ahead of the game. This too is resilience: not resisting change but recognising it early enough to respond effectively.”

Telecoms may historically have been perceived as heavily technical, but the future requires expertise spanning technology, operations, finance, commercial strategy, customer experience, AI and international partnerships.

For **Shaima Mirza, Director, Human Resources**, that creates an important opportunity for more women.

"MY ADVICE IS TO REMAIN CURIOUS; INVEST IN YOUR GROWTH AND NEVER UNDERESTIMATE THE VALUE YOU BRING."

“My advice is to remain curious; invest in your growth and never underestimate the value you bring. Have the confidence to speak up, embrace challenges and take your place at the table. Learning is a never-ending process.”

And entering the industry does not mean having every answer.

“The industry needs a more diversified approach to make the decisions that shape its future. You do not need to know everything before you begin — you need the courage to begin and the determination to keep growing.”

Nurturing their potential to lead

Individual ambition also needs to be matched by organisational opportunity. Empowerment goes beyond representation; it means giving women trust, meaningful responsibility and space to influence decisions.



For **Masha'el Al Marhoobi, Senior Lead, Global Sourcing**, organisations have an active role to play.

"Empowerment starts with trust and opportunity. Organisations need to create an environment where women are encouraged to contribute, given meaningful responsibility and supported to keep developing. When people know their perspective is valued and they have the space to grow, they become more confident in making decisions, challenging ideas and stepping into leadership."

Built Different Means Thinking Differently

For ZOI, empowering different perspectives is ultimately connected to how the company thinks, operates and serves its customers.

As **Sohail Qadir, CEO**, explains:

"Empowering women to lead and grow brings different perspectives, new

"EMPOWERMENT STARTS WITH TRUST AND OPPORTUNITY."

ideas and innovative decisions. At ZOI, we support our women to have the opportunity and confidence to shape not only our business, but the future of our industry. Being one of the highest-ranking organisations for women in leadership is a proud achievement, and we remain committed to increasing female representation across all areas of the business."

Resilience is not created by a single route, a single technology or a single way of thinking. It comes from anticipating rather than simply reacting, recognising when circumstances have changed, challenging assumptions and bringing together people who see the same problem from different angles to come up with comprehensive solutions.

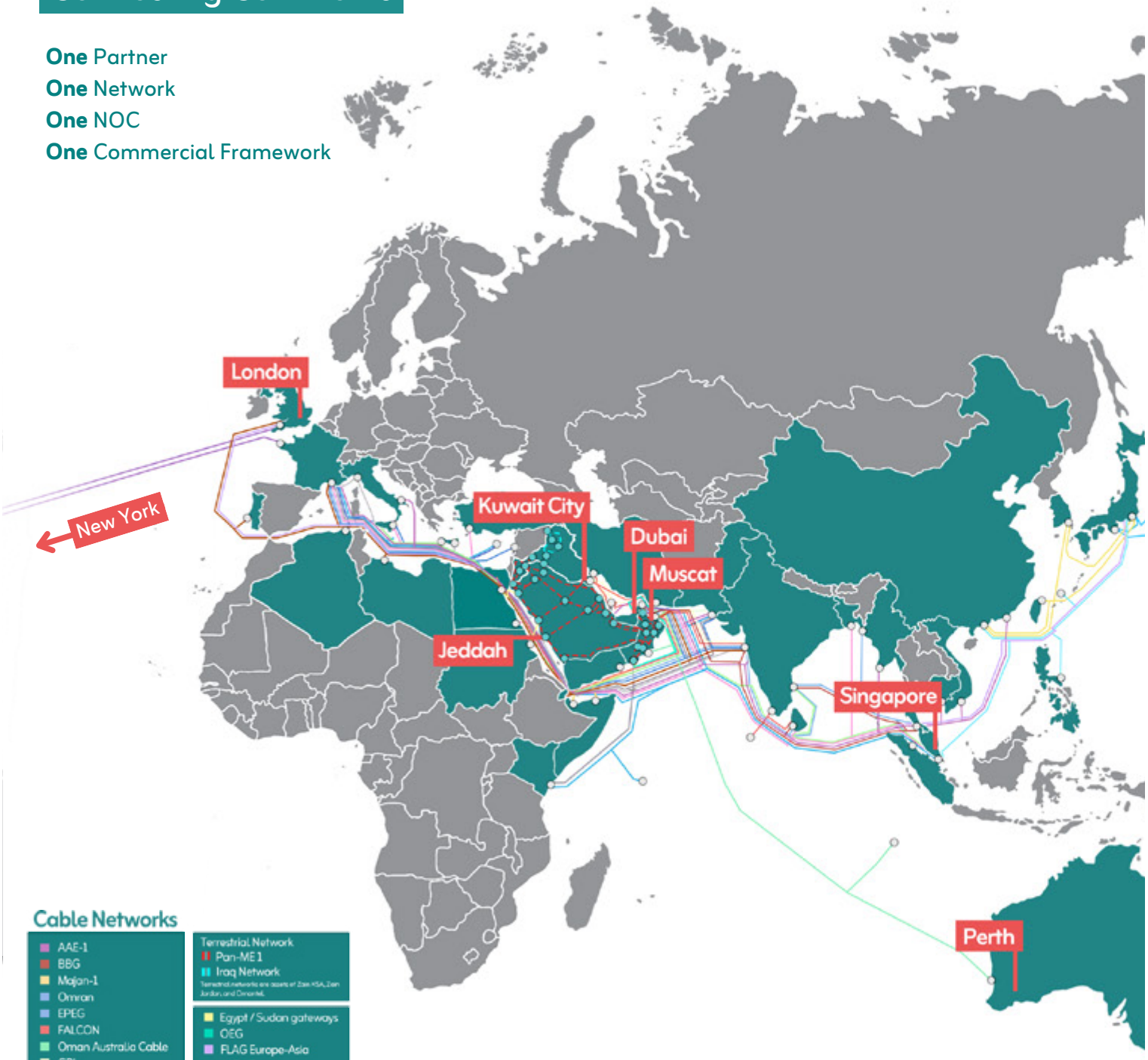
"THAT IS TO SAY, DIFFERENT PERSPECTIVES LEAD TO BETTER QUESTIONS. BETTER QUESTIONS LEAD TO BETTER DECISIONS. AND BETTER DECISIONS BUILD GREATER RESILIENCE."

ZOI
A Zain & Omantel Company

ZOI Network Infrastructure

Connecting Continents

One Partner
One Network
One NOC
One Commercial Framework



Cable Networks

- AAE-1
- BBG
- Majan-1
- Omran
- EPEG
- FALCON
- Oman Australia Cable
- GBI
- EIG
- MENA
- POI
- TW1
- IEX
- Africa-1 (planned)
- G2A
- J2M
- SING (planned)

Terrestrial Network
- Pan-ME 1
- Iraq Network

- Egypt / Sudan gateways
- OEG
- FLAG Europe-Asia
- IMEWE
- SeaMeWe-5 (SMW-5)
- TE North
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NEW **PERSPECTIVES.**
NEW ROUTES.
NEW **STRATEGIES.**

Global instability and surging AI demand mean capacity buyers need more than just connectivity. They need new networking strategies, greater resilience and capacity planning that reduces risk.

The role of the capacity buyer is evolving. For years, network planning focused on familiar questions: how much capacity was needed, where it was needed, and what it would cost.

Those questions still matter, but they are now accompanied by a new set of priorities: Where are we exposed? Which routes share the same geographic risks? What happens if a critical corridor is disrupted? How quickly can we respond? And what options do we have when conditions change?

This is a fundamental shift from buying connectivity to planning for risk.

AI is accelerating that change. As workloads become more distributed, latency-sensitive and critical to everyday operations, network decisions increasingly influence where compute can be deployed, which markets can be served and how confidently businesses can scale. AI is expected to account for more than 30% of metro traffic within three years.

At the same time, disruption across critical global corridors has demonstrated that resilience cannot be measured simply by how many cables or suppliers sit on a network diagram. Different routes can still share the same landing points, chokepoints and physical risks.

A Different Perspective on Resilience

That changes the conversation between customers and connectivity providers.

Capacity remains essential, but customers increasingly need partners who can look at the bigger picture. That means understanding their infrastructure strategy, identifying concentrations of risk, exploring genuinely diverse routes and planning what happens when the primary path is no longer available.

For ZOI, creating value means challenging conventional thinking. More capacity is one answer. Better routing, greater flexibility, and smarter choices can be even more valuable.

The Middle East makes this particularly important. It sits at the intersection of Europe, Asia and Africa, but significant international traffic remains concentrated around a relatively small number of geographic corridors and chokepoints.

Multiple cable systems can provide redundancy, but if they pass through the same geography or rely on the same landing infrastructure, a single event can affect several routes at once.

Building on the successful story of Oman, the region's most connected subsea cable hub, ZOI approaches resilience through ecosystem design rather than infrastructure volume alone. The objective is not simply to provide more routes, but to provide genuinely diverse options that reduce concentration risk and improve restoration capabilities when disruption occurs. ZOI is extending this model throughout its regions of operations.

New Routes for a New Risk Environment

The focus has to move towards genuine geographic diversity. TeleGeography expects a record 141,730 kilometres of new submarine cable to enter service in 2026, giving capacity buyers more infrastructure, more routing options, and more decisions to make.

"MORE CABLES DO NOT NECESSARILY MEAN **GREATER RESILIENCE."**

More cables do not necessarily mean greater resilience. When systems rely on the same geographies, landing points, or terrestrial routes, a single disruption can affect them all. The value of new infrastructure lies

not only in adding capacity, but in expanding genuine route choice.

Achieving resilience requires a more holistic view of the network. A cable landing in a different location adds value only if a resilient terrestrial path also exists between the landing point and the end destination.

ZOI approaches the Middle East with this broader infrastructure ecosystem in mind. The goal is not to replace established corridors, which will remain essential to global connectivity, but to give customers greater flexibility when circumstances change.

A Different Kind of Hyperscale Networking Provider

A more complex networking environment also demands a different relationship between providers and customers.

If the challenge is risk rather than simply capacity, the conversation cannot begin and end with a route and a price. It has to start based on a deep understanding of customer requirements. Where does the customer need to grow? What are they trying to protect? Where are the vulnerabilities? What happens if a particular route becomes unavailable?

At ZOI, that means approaching connectivity as a reliable answer to requirements rather than a product to sell.

Sometimes the answer will be more capacity. Sometimes it will be a different route, landing point or combination of subsea and terrestrial infrastructure. It could mean bringing traffic closer to a data centre or interconnection hub, or creating a clearer restoration plan before it is needed.

At ZOI, connectivity is approached as a solution rather than a product. By combining robust infrastructure with empowered teams that understand customer requirements, ZOI helps customers navigate growth, resilience and changing network demands.

As networks become more critical and complex, customers do not just need suppliers. They need people who listen, understand their challenges and work with them to achieve their goals.

Diversity of Routes. Diversity of Perspectives.

The demands on global networks will keep changing. AI will create new traffic patterns. Compute will become more distributed. New infrastructure will open new paths between markets, while disruption will continue to test established ones.

No network strategy can predict every change. It can be built to provide more options when change happens.

That is the thinking behind ZOI's approach to hyperscale networking. Bring together diverse routes, subsea and terrestrial infrastructure, data centres and the wider digital ecosystem. Understand how those assets work together. All managed by highly competent people who listen, understand the customer's priorities and can act when it matters.

For ZOI, resilience starts with perspective and is enabled by infrastructure. Backed by Zain Group and Omantel, ZOI combines diverse terrestrial and subsea connectivity, data centers and a customer-focused approach to create more choice. More choice enables customers to build networking strategies around their own growth, risk and priorities.

Discover how AI, new infrastructure and changing global risks are reshaping hyperscale networking. Read The Geography of Resilience, produced by ZOI in collaboration with Ciena, for a deeper look at the networking strategies needed to build greater resilience and reduce risk.

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PARTNERSHIP AS A DRIVER OF GROWTH

With

EUGENIO PRADAS

SVP GLOBAL STRATEGIC DEVELOPMENT
AT BTS



At the CCL Summit 2026 in Berlin, Eugenio Pradas, SVP Global Strategic Development at BTS, used his welcome remarks to highlight the importance of partnership across the wholesale telecom ecosystem. Drawing on BTS's own experience with strategic alliances, he emphasized how collaboration, technology, connectivity, and people continue to support growth across voice, messaging, cloud numbering, and emerging AI-enabled services.

Partnership Starts with Trust

One of the points I want to emphasize is partnership. It came up several times in the discussions yesterday, and I think it is especially relevant in our business because none of us can really do everything alone.

Carrier Community creates an environment where those partnerships can continue to develop. You see it in formal discussions, but you also see it in the conversations and negotiations happening throughout the event. Bringing people together in this way creates the conditions for trust, confidence, and ultimately business.

At BTS, we look at three core strengths: technology, connectivity, and people. Those three areas are closely connected to partnership because they only create their full value when they are combined with the right relationships.

A good example is our partnership with SoftBank through our joint venture, which has helped us strengthen our position in the market. More recently,

"FOR US, THE OBJECTIVE IS NOT TO REPLACE THE EXPERTISE BEHIND THE BUSINESS, BUT TO MAKE OUR SYSTEMS AND PROCESSES MORE EFFECTIVE."

we announced an expanded partnership with Liberty in the Caribbean. We have already been managing their voice business, and we are now extending that relationship into A2P messaging.

We have also announced a partnership in Eastern Africa with We2Stars in Ghana. Beyond these examples, many of our relationships are with companies represented in this room, including carriers, wholesale operators, and hyperscalers such as Meta and Google. These partnerships are an important part of the success we have been able to build.

Growing in a Mature Voice Market

The market continues to change, particularly in voice, where growth is no longer as straightforward as it was in the past. Even so, BTS continues to grow, and partnership is one of the reasons for that.

Voice remains our core business and represents around 90 percent of our activity. We continue to see double-digit growth in volume, with strong margin performance, and we expect to handle approximately 22 billion minutes this year. According to TeleGeography figures, that places BTS at the top of the wholesale market in terms of volume.

That position is not only the result of scale. It comes from the combination of technology, people, and the relationships we have built over time.

AI is also beginning to play a larger role in how we operate our voice business. We are using AI-related tools, machine learning, algorithms, and automation to improve efficiency and enhance our offering. For us, the objective is not to replace the expertise behind the business, but to make our systems and processes more effective.

We consider ourselves voice specialists, and the tools we now have available allow our teams to manage that business with greater efficiency while continuing to improve quality and performance.

Expanding Beyond Voice

At the same time, we are growing in A2P messaging. This is a more complex market, with different channels developing quickly and growing importance around services such as one-time passwords and authentication.

Despite that complexity, we are seeing double-digit growth in messaging as well, and we expect to handle close to 800 million messages over the year. It is another area where partnerships and strong operational capabilities matter because the ecosystem is becoming increasingly interconnected.

Cloud Numbering is also growing as part of our portfolio. Here, we are using enhanced AI capabilities within the platform to improve efficiency and termination for customers across different market segments, including call centers and other enterprise applications.

These different areas illustrate how the market is evolving. Voice remains central to us, but messaging, numbering, AI-enabled platforms, and new commercial models are becoming increasingly important alongside it.

Building Growth Together

What connects all of these activities is collaboration. Technology is important. Connectivity is important. People are essential. But the ability to combine those strengths with trusted partners is what allows us to grow in a market that is becoming more complex.

That is why events like Carrier Community continue to matter. They create opportunities not only to discuss what is happening in the industry, but to meet the people with whom we can build the next stage of the business.

At BTS, we are pleased to continue supporting that ecosystem and to keep developing partnerships across voice, messaging, connectivity, and emerging digital services.



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DIKMEN EDGU
Partner at Axon Partners Group

AHMED MOSA
Senior International Connectivity Expert at Axon Partners Group

The Gulf is entering a digital inflection point. The question isn't whether we'll become a hub – but whether we'll lead or lag

During a CCL Club members' breakfast discussion in Muscat, Axon Partners Group presented early findings from a new study designed to clarify what it really means to become a digital hub. Partner Dikmen Edgu and Senior International Connectivity Expert Ahmed Mosa introduced Axon Digital Hub Index, a framework that evaluates infrastructure, ecosystem maturity, and policy readiness across the GCC and global markets. Their analysis suggests that while the Gulf holds clear geographic, financial, and energy advantages, leadership will depend less on ambition and more on interconnection, regulatory alignment, and coordinated regional development.

Why the Digital Hub Conversation Has Become Urgent

Across the GCC and beyond, the phrase "digital hub" is used frequently. Governments, operators, and investors all reference it as a strategic goal. Yet the term is often applied without a shared definition of what a hub actually requires or how it should be measured.

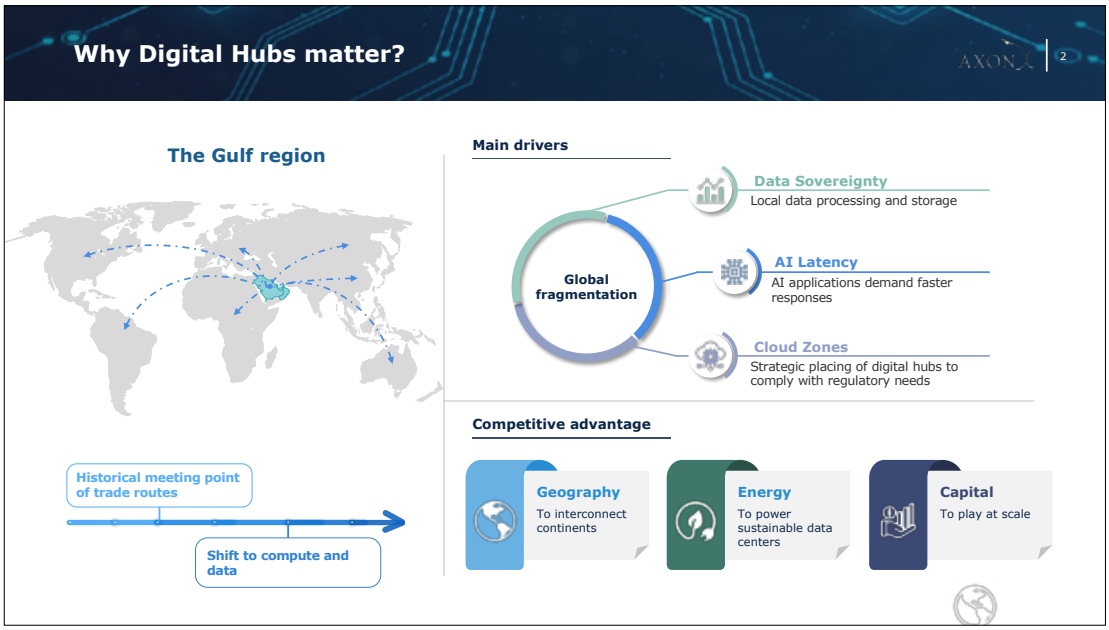
The timing of this conversation is not accidental. Several structural shifts are happening simultaneously. Artificial intelligence is reshaping infrastructure demand, with applications that require distributed compute, lower latency, and new patterns of data exchange. Data sovereignty is becoming a defining policy concern, influencing where data can be processed and stored. Cloud providers are expanding regional zones,

"THE CENTRAL QUESTION IS WHETHER GCC COUNTRIES ARE ALREADY OPERATING AS DIGITAL HUBS OR ARE STILL IN THE PROCESS OF BECOMING ONE."

creating clusters of compute that must be interconnected efficiently. Instead of a small number of centralized global locations, the world is moving toward a network of regional digital nodes.

Within this transition, the GCC is uniquely positioned. Historically, the region functioned as a crossroads for trade routes linking Asia, Europe, and Africa. Today, it can serve a similar role for digital traffic and compute distribution. Geography offers proximity to multiple continents. Energy availability supports large-scale data center development, including the potential for more sustainable power models. Capital investment capacity remains strong, allowing infrastructure to be financed at scale.

However, these advantages do not automatically translate into hub status. The central question is whether GCC countries are already operating as digital hubs or are still in the process of becoming one. Understanding that distinction requires more than marketing language. It requires measurable criteria.



Measuring Hub Readiness: The Four Plus One Model

To bring structure to the discussion, Axon developed the Digital Hub Index using what it calls a “four plus one” pillar framework. The goal is to evaluate both physical infrastructure and the ecosystem conditions necessary for that infrastructure to generate sustained digital activity.

The first pillar focuses on infrastructure. This includes the presence of data centers, subsea cable landings, landing stations, internet exchange points, and the broader connectivity architecture that forms the physical backbone of a hub.

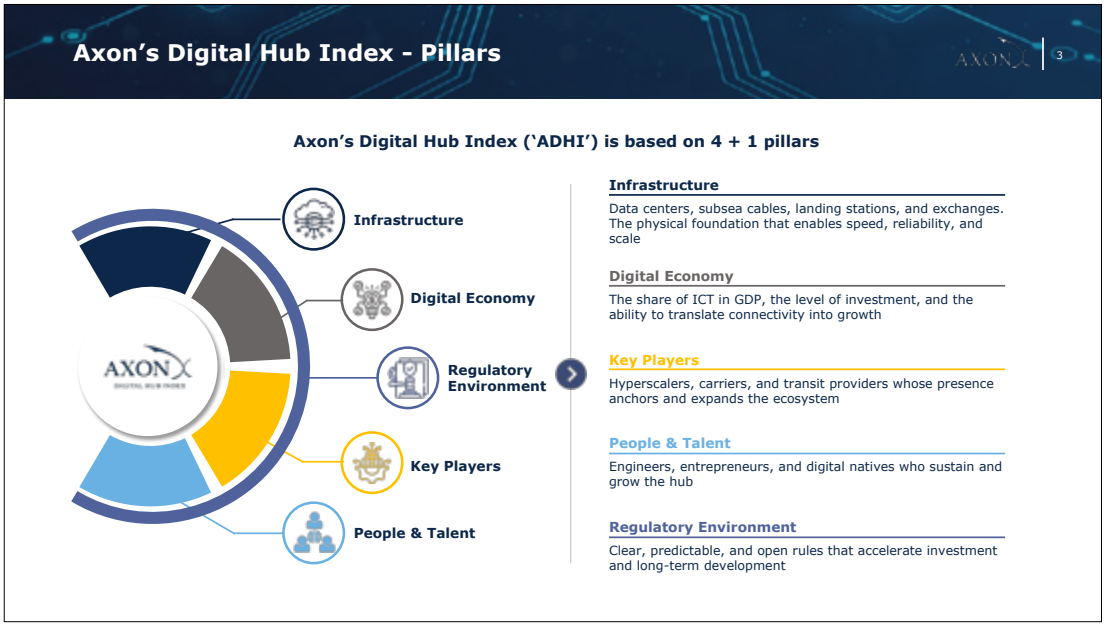
The second pillar examines digital economy drivers. Infrastructure alone does not create value unless it is matched by demand. Indicators such as ICT spending relative to GDP, investment intensity, and the ability to convert connectivity into digital services help measure whether a country can translate assets into economic output.

The third pillar evaluates the presence of key ecosystem players. A resilient hub depends on diversity. Hyperscalers, carriers, transit providers, cloud platforms, and enterprise users must all be present and active. Markets dominated by a single anchor player tend to struggle to achieve the same level of dynamism as those with multiple participants.

The fourth pillar considers people and talent. Skilled human capital is necessary to operate networks, manage data center environments, and support digital services at scale. Without it, infrastructure risks remaining underutilized.

The additional “plus one” pillar looks at the regulatory environment. Rather than treating regulation as an isolated category, it is assessed as an enabler that can accelerate or constrain the other pillars. Effective policies support interconnection, provide predictability for investors, and allow infrastructure to be used efficiently across borders and stakeholders.

This methodology attempts to answer a simple question: not who wants to be a digital hub, but who has assembled the conditions required to function as one.



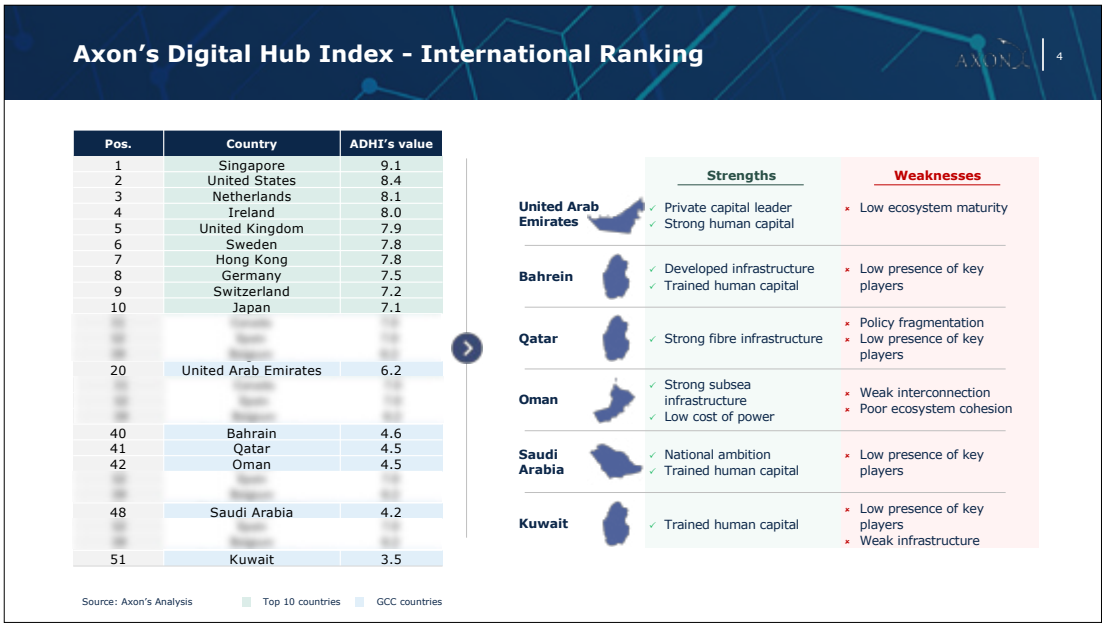
What the Initial Results Reveal About the GCC

Applying this model across a range of global economies produces a layered picture. Mature digital markets in North America, Europe, and parts of Asia continue to dominate the top tier due to decades of accumulated infrastructure, ecosystem density, and regulatory evolution.

The GCC countries appear immediately behind this leading group, with meaningful progress but still facing structural gaps. In the first iteration of the index, the UAE ranks highest among GCC states, followed by Bahrain, Qatar, Oman, and Saudi Arabia.

The UAE’s position reflects strong

private capital investment and relatively developed human capital. Yet even there, the broader ecosystem remains less mature than those of established global hubs. Infrastructure expansion has been rapid, but ecosystem depth takes longer to build.



Oman presents a different profile. The country demonstrates strong infrastructure fundamentals and geographic relevance, particularly through subsea connectivity. At the same time, the analysis points to challenges in interconnection and ecosystem cohesion. Infrastructure assets are present, but the mechanisms that allow operators, carriers, and digital players to interconnect efficiently remain more limited than required for hub-scale activity.

These observations illustrate a broader regional pattern. Each country possesses individual strengths, yet none has fully aligned all the conditions needed to operate as a global digital aggregation point. The transition from infrastructure owner to ecosystem orchestrator is still underway.

Opportunity and Pressure Are Arriving Together

The region now faces both competitive pressure and strategic opportunity. Large-scale investment programs in markets such as the UAE and Saudi Arabia are accelerating infrastructure deployment and ecosystem attraction. Neighboring countries must decide how to differentiate, collaborate, or scale in response.

Meanwhile, AI-driven applications are altering traffic flows. Routing increasing volumes of data through distant European nodes is becoming less practical for latency-sensitive workloads. Regional processing, localized inference, and diversified connectivity paths are gaining importance. This creates demand for new corridors, additional redundancy, and more distributed compute capacity.

"FACILITIES ALONE CANNOT ESTABLISH HUB STATUS IF CONNECTIVITY BETWEEN THEM IS COSTLY OR COMPLEX."

At the same time, rapid data center development risks outpacing the supporting ecosystem. Facilities alone cannot establish hub status if connectivity between them is costly or complex. In several GCC markets, in-country and intra-city connectivity pricing still limits the economic advantages of clustering data centers locally.

Policy fragmentation adds another layer of complexity. Differences in regulatory frameworks, open access principles, and approval timelines can slow investment and make cross-border initiatives harder to execute. Aligning these frameworks may prove just as important as building new infrastructure.



Data sovereignty discussions further complicate the landscape. European markets may, under specific safeguards, accept processing certain workloads in GCC-based facilities if energy cost or capacity advantages justify it. The reverse scenario is less likely, reflecting different regulatory sensitivities. Designing trusted cross-border data frameworks will therefore become an essential part of hub development.

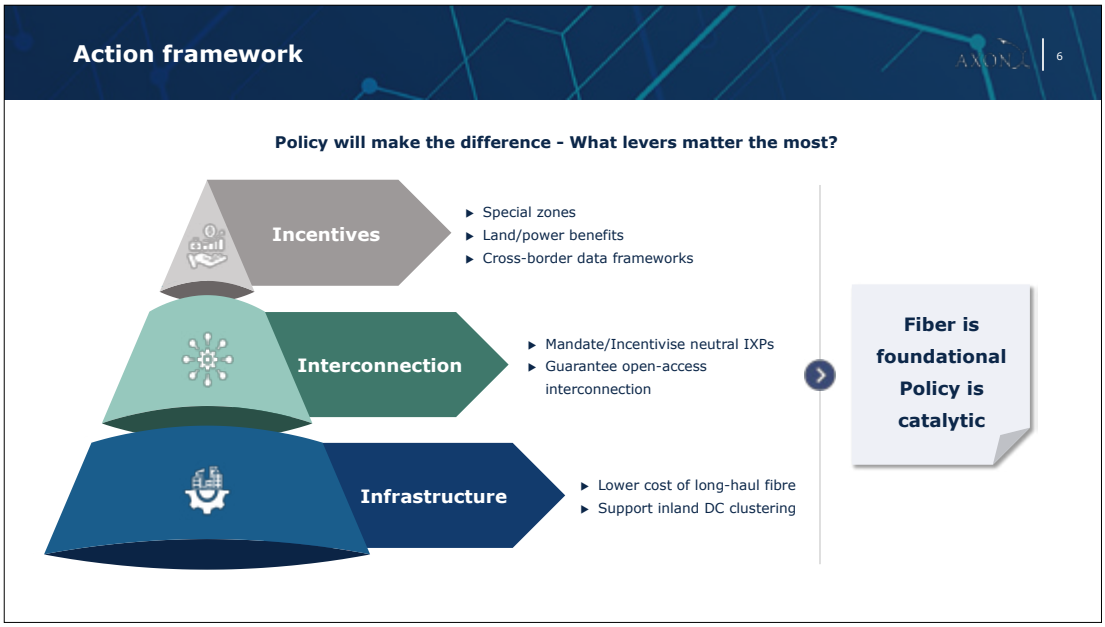
Policy as the Catalyst for Hub Transformation

The findings suggest that policy and coordination now represent the decisive factors in determining whether the GCC evolves into a collection of connected markets or a genuinely integrated digital platform.

Targeted incentives such as special economic zones, land and power frameworks, and cross-border data agreements can accelerate ecosystem formation. Clear interconnection policies that encourage neutral exchange environments and open access can reduce friction between operators and service providers. Lowering domestic connectivity costs can make localized compute and data center clustering economically viable.

These measures shift the conversation from infrastructure deployment to infrastructure utilization. The next phase of development is less about laying cables and more about enabling collaboration, competition, and service creation on top of them.





A Shared Regional Project

Axon Digital Hub Index is intended not as a definitive ranking but as a tool for ongoing industry engagement. Its evolution depends on input from operators, policymakers, investors, and ecosystem participants across the region. By refining how hub readiness is measured, stakeholders can better identify where coordination is needed and how progress can be tracked over time.

The Gulf is entering a decisive stage in its digital transformation. The region's advantages are clear, but leadership will depend on aligning infrastructure, ecosystems, and policy into a coherent whole. The outcome will determine whether the GCC becomes merely a transit zone for global data flows or a central platform shaping how those flows are created, processed, and exchanged.



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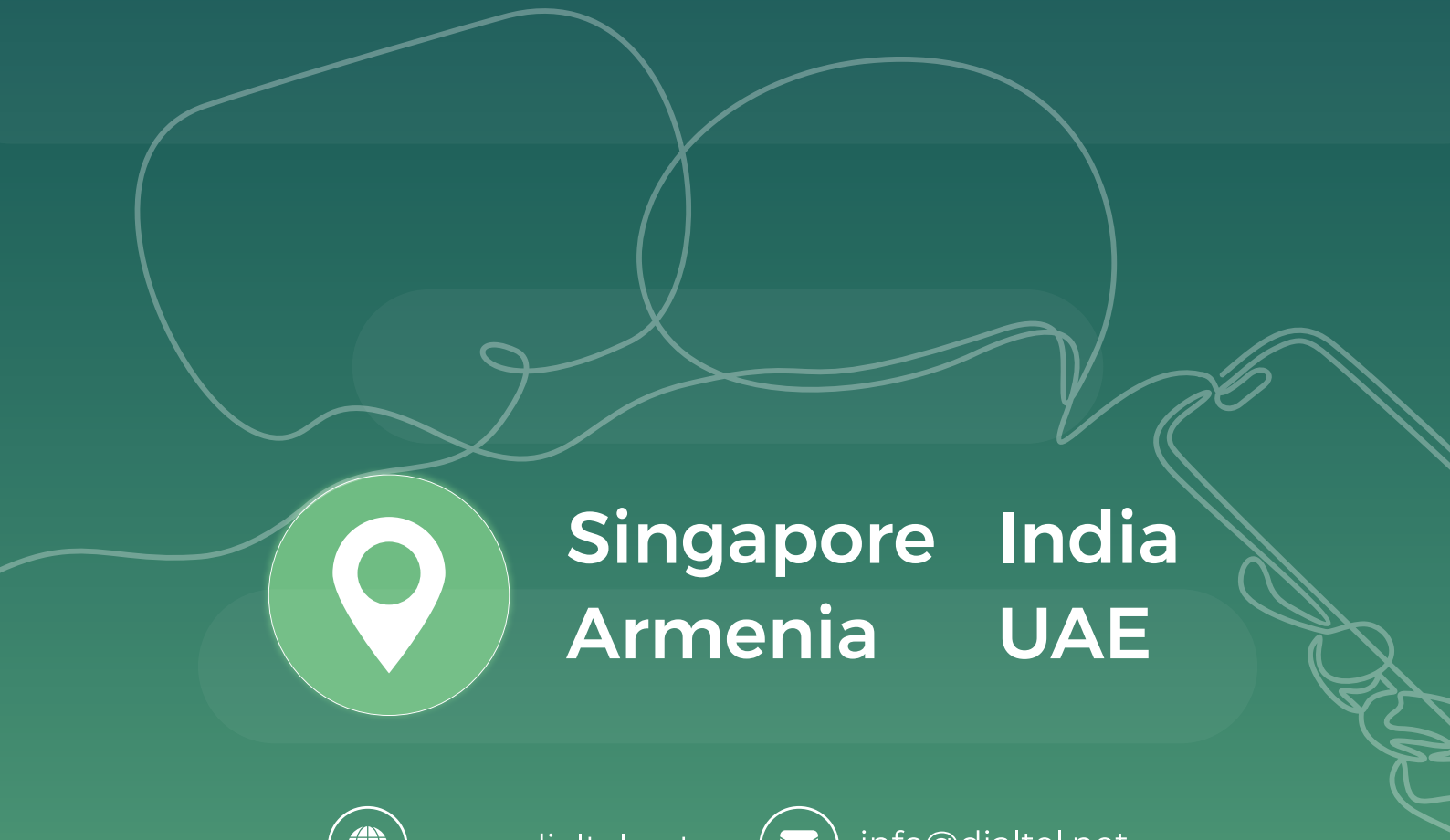
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PETE HALL

Regional Managing Director, MEA

ciena

Ciena's Business in GCC

1. Looking back over the past year, what have been some of the most significant developments or milestones for Ciena, particularly in the Middle East and across the wider global connectivity market?

The past year has reinforced just how quickly network requirements are evolving as AI, cloud, and data center investment accelerate globally.

In the Middle East, we are seeing this transformation move from ambition into deployment. Across the Gulf, operators are investing in higher-capacity optical networks, data center interconnect, subsea connectivity, national fiber infrastructure, and greater network automation.

A good example is e& UAE , which became the first operator in the Middle East and Africa to deploy Ciena's WaveLogic 6 Extreme technology on its national network, supporting a future-ready, high-capacity DWDM network. The deployment is designed to support growing bandwidth requirements, cloud services, data center interconnect, and future digital applications.

In Oman, Omantel has taken a similar approach with a managed optical fiber network built specifically to serve hyperscalers, cloud providers and large enterprises as AI and cloud demand grows, while Bahrain has advanced its own AI-ready infrastructure through Batelco's edge data centre and white-space expansion. These are early signs of a broader shift: operators across the region are starting to align their transport strategy directly with AI infrastructure demand, rather than treating connectivity as an afterthought.

Globally, Ciena has continued to advance high-speed connectivity for the AI era, including WaveLogic 6 technology supporting up to 1.6 Tb/s coherent transmission, alongside new developments in coherent pluggables, data center connectivity, routing and switching, and network automation.

> "IN THE GULF SPECIFICALLY, WE SEE AN OPPORTUNITY FOR SERVICE PROVIDERS **TO PLAY A CENTRAL ROLE IN CONNECTING DISTRIBUTED AI INFRASTRUCTURE"**

For us, the common thread is clear: customers are no longer simply preparing for future bandwidth growth. They are building networks today for a fundamentally different digital infrastructure environment.

2. As AI, cloud services and hyperscale data growth continue to reshape network requirements, how do you see these trends influencing the next generation of connectivity and network infrastructure?

AI is changing both the scale and the architecture of connectivity.

Traditional cloud growth concentrated enormous amounts of traffic around major data centers and cloud regions. AI adds another dimension because compute is increasingly being distributed across multiple campuses, metro locations, cloud environments, and potentially across national and international boundaries.

That makes the connectivity between these environments increasingly strategic. We see this playing out in phases. The first is the interconnect layer around AI infrastructure itself, which is where most of the near-term opportunity sits today. The second is a widening customer base, as sovereign platforms, neoclouds and GPU specialists join hyperscalers as buyers of high-capacity connectivity. The third is inference, which will push demand outward from a handful of large training campuses into enterprise, government and everyday digital services. High-capacity data center interconnect is extending beyond individual metro networks to encompass campus, regional, backbone, and international connectivity. In the Gulf specifically, we see an opportunity for service providers to play a central role in connecting distributed AI infrastructure and turning that connectivity into differentiated services.

Our recent global research reinforces that opportunity: 90% of surveyed service providers expect high-capacity AI-driven network services to be a primary driver of revenue growth, while 88% expressed a strong sense of urgency around upgrading optical networks to support premium enterprise AI connectivity.

The next generation of networks therefore has to combine enormous capacity with programmability, resilience, efficiency, and increasingly intelligent operations.

3. What are the most important challenges and opportunities you are seeing as customers across the Middle East modernise their networks to support growing capacity, data-centre connectivity and greater automation?

One of the biggest opportunities is also one of the biggest challenges: the sheer pace of infrastructure development across the region.

Middle Eastern operators are being asked to support rapidly growing data center ecosystems, hyperscaler and cloud expansion, AI workloads, subsea systems, and new regional digital corridors, often while continuing to operate complex brownfield networks.

Capacity is rarely the constraint people assume it to be. With the right planning, fibre and optical networks can carry far more traffic than they do today. The tighter constraints sit elsewhere: power availability in major metro areas, and the shortage of skilled network and AI talent needed to design and run these environments. Operators that plan connectivity, power and people together, rather than as separate projects, are the ones moving fastest.

This creates significant opportunities in data center interconnect, high-capacity optical transport, IP and optical convergence, and network automation. It also increases the importance of having a trusted view of network resources and services, and being able to automate operations without sacrificing governance or control.

This is why we talk about the industry's progress in stages, from today's largely manual operations toward what the industry calls Level 5 autonomous networking: self-configuring, self-healing and self-optimising, with automation earning operators' trust as it goes rather than being switched on all at once. Ciena and Blue Planet are building agentic AI and open automation into that path, but the harder part for most operators is governance: knowing what to automate first, and how to keep visibility and control as they do.

"AI WILL INCREASINGLY INFLUENCE NOT ONLY THE TRAFFIC RUNNING ACROSS NETWORKS BUT ALSO HOW THOSE NETWORKS THEMSELVES ARE PLANNED, DEPLOYED, ASSURED, AND OPTIMIZED."

4. Looking ahead to the next 12–24 months, what will be Ciena's key strategic priorities, and where do you see the greatest opportunities for innovation and growth?

Our focus will continue to be on helping customers build the high-speed, programmable, and increasingly autonomous networks required for the AI era.

That means continuing to push coherent optics further, including newer pluggable formats such as WaveLogic 6 Nano for metro data center interconnect, and following the industry's early movement toward co-packaged optics as pluggables reach their limits inside the data centre. It also means strengthening the connection between network infrastructure, software control, automation, and operational intelligence.

AI will increasingly influence not only the traffic running across networks but also how those networks themselves are planned, deployed, assured, and optimized.

For the Middle East specifically, the opportunity is less about adding any one of these capabilities and more about sequencing them correctly: interconnect first, a broader base of AI-native customers second, distributed inference third. The scale of digital infrastructure investment taking place across the Gulf creates an opportunity for the region to build some of the world's most advanced network architectures rather than simply replicate models developed elsewhere.

5. Is there anything else you would like to share with GCCM Magazine readers about upcoming initiatives or future plans?

What excites us most about the Middle East is that the conversation has moved beyond simply adding network capacity.

The ambition of the region and customers isn't only to build data centres and GPU clusters. It is also to position the region as a connectivity bridge for markets that cannot build enough compute capacity of their own, particularly parts of Europe and the wider Global South that will increasingly rely on capacity located here.

Ciena intends to continue working closely with service providers, cloud and digital infrastructure players, and partners across the region as those architectures evolve.

The next phase will be about combining high-speed connectivity with greater programmability and automation, allowing networks not only to transport unprecedented volumes of data but to adapt more intelligently to changing business and operational requirements.

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SAMER LUTFI

Head of MEA Hyperscaler and AI&Cloud business.

NOKIA

1. Looking back over the past year, what have been some of the most significant developments or milestones for Nokia, and which achievements are you particularly proud of?

The past year has been an important one for Nokia as we sharpened our strategy around a simple ambition: to lead the AI-driven transformation of networks by connecting intelligence. We simplified the company around Network Infrastructure and Mobile Infrastructure, while increasing our focus on AI and cloud, customer co-innovation and the areas where our technology can deliver the greatest differentiation.

What makes me particularly proud is that this strategy is already translating into customer momentum. In the first half of 2026, demand from AI and cloud customers accelerated significantly: second-quarter sales to this segment more than doubled year on year, while Optical Networks and IP Networks delivered strong growth. That demonstrates that the network is no longer a supporting element of the AI economy; it is a strategic part of it.

From a technology perspective, several milestones stand out. We launched an AI Networking Innovation Lab to co-innovate on AI-native data center networking, introduced application-optimized optical solutions for AI-era networks, and were recognized by GigaOm as a Leader and Outperformer in data center switching for the fifth consecutive year. In IP, our agentic AI framework for the Network Services Platform is another strong step toward more trusted and autonomous operations.

In our region, I am equally proud of the tangible progress with customers: Rolling-out long-haul optical networks across the Middle East and Africa with our key customers; and building high-capacity, low-latency optical network supporting hyperscalers and AI-driven services; and lately the opening of Nokia's new R&D center in Riyadh, which will develop AI-powered network automation with Saudi talent for local and global customers. These are not isolated technology demonstrations, they are building blocks of the region's AI and digital economy.

2. AI, cloud and data-centre growth are creating new demands on network infrastructure. How do you see these trends reshaping connectivity requirements, and how is the industry responding?

AI changes the network equation fundamentally. Traditional cloud applications could often tolerate variable performance. AI training and inference cannot. They depend on enormous, synchronized data flows between accelerators, storage and distributed data centers. This makes high throughput, ultra-low latency, very low packet loss, deterministic performance and continuous availability essential.

The connectivity model is therefore expanding in three directions: scale-up within a rack, scale-out across clusters inside a data center, and increasingly scale-across between geographically distributed AI factories. As power, space and sustainability constraints make it difficult to locate all compute in one facility, IP and optical networks must connect multiple sites as if they were one AI system. That requires high-speed Ethernet fabrics inside the data center and coherent optical connectivity across metro, regional and long-haul distances.

The industry is responding by moving toward open, programmable and highly automated architectures. Ethernet is emerging as a strong foundation for AI back-end networks, while coherent optics is becoming critical for data center interconnect and scale-across. At the same time, observability, secu-

rity and automation must be designed into the network from the start. Nokia's approach is to bring data center switching, IP routing and optical networking together as an end-to-end connectivity fabric—inside, between and beyond the data center.

3. As customers continue to modernise their networks, what are the most important challenges and opportunities you are seeing around capacity, automation, resilience and network efficiency?

The challenge is not simply to add more capacity. Customers need to increase capacity while reducing operational complexity, energy consumption and risk. Traffic is becoming more dynamic and less predictable, and AI workloads amplify the impact of congestion or failure. Networks therefore need to combine scale with intelligence and resilience.

On capacity, the opportunity is to evolve from incremental upgrades to architectures that can scale economically across multiple generations. This includes denser routing platforms, higher-speed interfaces, coherent optics and more flexible spectrum use. The objective is not capacity at any cost, but the lowest sustainable cost per transported bit, with a clear path to future growth.

Automation is equally important. Customers want to move from manual, reactive operations toward intent-based, closed-loop and increasingly agentic operations. AI can help detect anomalies, predict capacity needs, accelerate assurance and resolve issues before service is affected. However, autonomy must be trusted: operators need explainability, policy control, auditable decisions and strong cybersecurity.

Resilience now extends beyond hardware redundancy. It includes protection against cyberattacks, supply disruptions and increasingly the need for quantum-safe security. It also requires end-to-end visibility across multivendor and multidomain environments. The opportunity for the industry is to make resilience programmable and proactive rather than something tested only after a failure.

"FIRST IS SOVEREIGN AI INFRASTRUCTURE."

4. The Middle East is investing significantly in digital infrastructure, AI and next-generation connectivity. Where do you see the strongest opportunities for Nokia in the region over the next few years?

The Middle East has a distinctive opportunity because governments, telecom operators and enterprises are aligning national transformation agendas with major investments in cloud, AI, data centers and international connectivity. I see four especially strong areas for Nokia.

First is sovereign AI infrastructure. Governments and enterprises increasingly want AI capabilities with data, compute and governance kept under local control. Telecom operators are well positioned to play a larger role because they bring trusted local relationships, distributed sites and end-to-end control of the transport network. Nokia can enable that opportunity with secure data center fabrics, IP routing, optical interconnect and automation.

Second is the rise of regional AI and cloud hubs. The Gulf's geographic position—linking Asia, Africa and Europe—creates a compelling opportunity for new data center corridors, subsea and terrestrial routes, and high-capacity interconnection.

Third is autonomous network operations. As regional networks become more complex, AI-powered orchestration, assurance and energy optimization will be essential.

Fourth is mission-critical digitalization across energy, transport, public sector and industry. These customers need secure, deterministic and resilient connectivity, not best-effort networks. By combining IP, optical, broadband, private wireless and edge capabilities, Nokia can help turn ambitious national visions into operational outcomes.

5. Looking ahead to the next 12–24 months, what will be Nokia's key strategic priorities, and are there any upcoming developments or initiatives you would particularly like to share with our readers?

Our priorities are clear. We will accelerate growth in AI and cloud; lead the next era of mobile connectivity through AI-native networks and 6G; co-innovate more deeply with customers and partners; focus investment where Nokia can differentiate; and deliver sustainable returns.

For Network Infrastructure, that means continuing to advance an integrated portfolio across data center switching, IP routing and optical networking. Customers should expect further progress in AI-optimized Ethernet fabrics, higher-capacity and more energy-efficient optical transport, scale-across connectivity, autonomous IP operations, proactive security and quantum-safe networking. Our AI Networking Innovation Lab will also be an important vehicle for turning ecosystem collaboration into deployable solutions.

In the Middle East and Africa, we will remain focused on translating global innovation into local impact. This includes supporting sovereign AI ambitions, expanding data center and cloud interconnection, strengthening critical infrastructure and building local capabilities.

Ultimately, the next 12–24 months will be about execution. AI is creating an extraordinary investment cycle, but its value will only be realized if the underlying connectivity is scalable, secure, resilient and efficient. Nokia intends to be the trusted technology partner that helps customers build that foundation.

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TARIQUE ASLAM QURESHI

Chief Executive Officer

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SATELLITE CONNECTIVITY IN A CONVERGED DIGITAL ECOSYSTEM



Moderator:



ERIK VAN STOKKOM

Chief Moderator and M&A, Carrier Community

Panelists:



PASCAL FALLET

GVP Europe, Connectivity BU, Eutelsat OneWeb



EDUARDO MARTINS

Senior Account Manager, MEO Wholesale Solutions



MIGUEL BOAVIDA

Head of Space and Ground Segments, Thales Portugal

Satellite infrastructure is no longer viewed as a standalone communications layer operating separately from terrestrial networks and subsea systems. At the SIS 2026 Summit in Lisbon, the discussion around satellite connectivity made one point very clear: the future digital ecosystem will depend on a close integration between satellites, fiber infrastructure, teleports, data centers, cloud platforms, and edge computing environments.

Why Teleports and Ground Infrastructure Matter More Than Ever

The discussion opened with a focus on the strategic importance of satellite teleports and cable landing stations within the global network topology. While satellite systems often attract attention because of the spacecraft orbiting above the Earth, the panel emphasized repeatedly that the real operational complexity remains firmly on the ground.

Pascal Fallet immediately framed the issue in practical terms. “No teleport, no service,” he said. “You can have as many satellites in the sky as you want, but without the infrastructure on the ground, nothing works.”

Pascal explained that Eutelsat OneWeb’s

global low Earth orbit constellation is technically capable of covering the entire planet, but areas without fully deployed ground infrastructure still cannot receive service properly. In other words, satellites alone are not enough. Ground stations, teleports, terrestrial backhaul, and fiber diversity remain absolutely essential.

“The service happens here on the ground,” Pascal noted. “Not in the sky.”

That point became one of the central themes of the session. Satellite systems may extend global reach, but they still depend heavily on terrestrial integration to function effectively.

Eduardo Martins connected this discussion directly to Portugal’s own recent experiences with network disruption and infrastructure resilience. He referred to earlier remarks made at the conference by the chairwoman of ANACOM, Portugal’s communications regulator, who repeatedly stressed the importance of resilience.

According to Eduardo, recent events such as storms and network disruptions demonstrated very clearly how important satellite connectivity has become within national infrastructure planning.

“This ecosystem between submarine cables, teleports, and satellite systems is essential,” Eduardo explained. “Countries need resilient and diversified infrastructure if they want stable communications and economic security.”

Miguel Boavida illustrated the importance of teleports through a real-world geopolitical example. He described a situation in West Africa where a country undergoing elections was effectively isolated after neighboring terrestrial infrastructure was disrupted.

According to Miguel, communications were only partially restored because a recently deployed teleport allowed traffic to be rerouted through satellite infrastructure to regions outside the affected area.

“This is where satellite becomes politically agnostic,” Miguel explained. “It crosses borders without depending entirely on terrestrial infrastructure.”

The example reinforced one of the key advantages of satellite systems during geopolitical crises: they can bypass damaged or politically sensitive terrestrial routes when necessary.

Still, all three panelists agreed that satellite connectivity cannot operate independently.

> “IF YOU DO NOT HAVE MULTIPLE FIBERS, REDUNDANCY, AND QUALITY OF SERVICE,” HE SAID, “THEN YOU ARE NOWHERE.”



“Teleports without fiber do not work,” Miguel stressed.

Pascal added that redundancy and diversity are now fundamental requirements for any modern infrastructure environment.

“If you do not have multiple fibers, redundancy, and quality of service,” he said, “then you are nowhere.”

Resilience, Sovereignty, and Europe’s Strategic Concerns

As the discussion evolved, resilience quickly became intertwined with another major topic: sovereignty.

The panel repeatedly returned to concerns about Europe’s growing dependence on non-European communications systems and infrastructure providers. **Eduardo Martins** described this as one of the most pressing issues currently facing operators and governments across the continent.

"We are increasingly dependent on networks that are not European in origin," Eduardo warned.

For MEO Wholesale Solutions, which operates across submarine cable systems, data centers, and satellite infrastructure, geopolitical instability is now a major operational concern.

Eduardo pointed directly to recent cable cuts, political tensions, and global instability as factors forcing operators to rethink how resilient their infrastructures truly are.

"We know something will happen," he said. "The question is when."

According to Eduardo, customers themselves are becoming much more focused on resilient network design. Enterprises and governments are now actively seeking diversified infrastructure solutions capable of surviving outages, disruptions, or geopolitical events.

That growing awareness has significantly increased the strategic relevance of satellite systems.

Pascal Fallet strongly reinforced the sovereignty argument. He referred to situations where communications services had been disrupted during periods of conflict and stressed the importance of having European-controlled alternatives available.

"We are not under the control of someone outside Europe who can decide from one day to the next to cut services," Pascal said.

For him, sovereignty is not simply a political concept. It is directly connected to operational trust, long-term planning, and infrastructure reliability.

"The trust between European players is absolutely key," he added.

Miguel Boavida then connected the discussion to Europe's broader strategic initiatives, particularly the IRIS² program, the European Union's planned sovereign multi-orbit satellite constellation.

According to Miguel, IRIS² should not be viewed as optional.

"IRIS² is not a question of whether we need it," he argued. "It is a necessity."

He compared the current situation to Europe's earlier dependence on foreign-controlled GPS systems. Miguel recalled how disruptions during geopolitical conflicts decades ago exposed Europe's vulnerability and eventually led to



"A REGION WITHOUT COMMUNICATIONS IS LOST,"

the development of Galileo, Europe's independent satellite navigation system.

Now, he believes Europe faces a similar challenge with communications infrastructure.

"A region without communications is lost," Miguel said.

For him, IRIS² represents more than a commercial telecommunications initiative. It is a strategic sovereignty project designed to ensure that Europe maintains control over critical communications infrastructure during periods of crisis.

The panel acknowledged that Europe's fragmented political structure creates challenges for such initiatives. Pascal humorously noted that even making decisions between two people can be difficult, "so imagine twenty-seven countries."

Still, despite the complexity, all speakers agreed that cooperation across European states and industries is essential.

"When Europe works together, it is stronger," Pascal said.

LEO, GEO, MEO, and the Rise of Multi-Orbit Networks

One of the most technically significant parts of the session focused on the

evolution of satellite architectures and the growing role of low Earth orbit systems.

Pascal Fallet explained that demand for LEO connectivity is increasing rapidly because of its lower latency, easier deployment, and lower hardware costs compared to traditional geostationary systems.

“LEO is opening completely new possibilities,” he said.

This is particularly important for mobility applications, backup connectivity, enterprise services, and underserved regions where terrestrial infrastructure remains limited.

Still, the panel strongly rejected the idea that LEO systems would completely replace traditional satellite architectures.

“GEO is not dead,” Pascal said directly.

Miguel Boavida expanded on that point by emphasizing the importance of multi-orbit ecosystems.

“There is no single best system,” Miguel explained. “LEO, MEO, and GEO all have their own advantages.”

According to Miguel, low Earth orbit systems offer lower latency but come with higher operational complexity and smaller coverage footprints. Geostationary systems continue to provide broad coverage and remain essential for many broadcasting and communications services.

“LEO is not here to replace anyone,” Miguel said. “It is here to complement existing systems and improve the overall user experience.”

The panel also stressed that the digital divide did not suddenly become a concern because of LEO constellations. Satellite systems have been connecting remote regions, maritime routes, and aircraft for decades.

“What LEO is really doing,” Miguel noted, “is lowering costs and bringing connectivity to the mass market.”

That evolution is also reshaping customer expectations. Lower latency and easier deployment make satellite solutions increasingly attractive as part of broader enterprise and telecom architectures.

At the same time, competition within the satellite sector is intensifying.

Miguel referred carefully, but clearly, to the presence of major global players with enormous financial resources that are capable of operating at scales difficult for European companies to match.

Pascal acknowledged that competition can be positive because it drives innovation and expands market adoption.

“Competition is good,” he said. “It creates new usages and helps make services accessible.”

However, he also warned that some forms of competition may become problematic if they undermine long-term sustainability, partnership models, or fair commercial practices.

“We must stay vigilant,” Pascal noted.

Convergence Between Satellites, Data Centers, and Cloud Infrastructure

One of the most forward-looking parts of the discussion centered on interoperability and the convergence of terrestrial and space-based digital infrastructure.

Eduardo Martins argued that the industry is moving toward a fully integrated ecosystem where satellite, terrestrial, and cloud infrastructures work together seamlessly.

“Fiber alone is not enough,” he said.

He pointed out that predictions about the “death of satellite” had circulated for years as fiber infrastructure expanded globally, yet satellite systems remain essential for many critical applications.

Broadcasting remains heavily dependent on geostationary satellites, while mobility, resilience, and remote access increasingly rely on hybrid architectures combining terrestrial and orbital networks.

Eduardo also suggested that the industry is now approaching another major transition point: data processing itself moving into space.

“In the future, we will also have data centers in the sky,” he said.

Rather than relying entirely on terrestrial facilities, future satellite systems may process and route information directly in orbit. According to Eduardo, this evolution is already beginning.

Miguel Boavida expanded on this idea further.

“In this new space era, data centers themselves are becoming satellites,” he said.

That shift would increase the importance of teleports even more, because communication between terrestrial systems and orbital infrastructure would become even more integrated.

“How are you going to connect those systems?” Miguel asked rhetorically. “You cannot run fiber into space.”

Pascal returned to the core principle that none of these infrastructures can function independently.

“You can have the best connectivity in the world, but without data there is nothing to transfer,” he said. “And you can have the best data center in the world, but if it is not connected, it is useless.”

The discussion highlighted how future digital ecosystems will depend less on isolated infrastructure layers and more on highly integrated architectures linking satellites, subsea systems, terrestrial networks, cloud environments, edge computing facilities, and AI platforms.

Competition, Regulation, and the Need for Cooperation

Toward the end of the discussion,



"IN THE FUTURE, WE WILL ALSO HAVE DATA CENTERS IN THE SKY,"

the panel turned its attention to the changing commercial environment surrounding satellite connectivity.

Eduardo Martins explained that traditional operators face very different market conditions today compared to previous decades.

"MEO has operated teleports for more than fifty years," he said, "but the challenges today are completely different."

The arrival of extremely large global players has transformed the market structure. Traditional consortium-based models have largely disappeared, replaced by companies operating globally under centralized management structures.

According to Eduardo, this creates both opportunities and risks.

"We cannot fight some of these players directly because they are simply too large," he admitted.

At the same time, he stressed that operators still need stable commitments, service guarantees, and long-term partnerships in order to support enterprise and government customers properly.

Pascal Fallet then offered one of the sharpest observations of the session. He encouraged customers and partners to pay close attention to the fine print in contracts with some providers.

"Read the small lines carefully," he warned.

Pascal pointed specifically to issues such as short-term contractual flexibility, direct customer targeting, and the use of customer data.

"We do not use customer traffic for AI training," he emphasized.

For Pascal, long-term trust and stable multi-year commitments remain essential parts of the European telecommunications model.

"We work with governments and operators that need to plan long term," he explained.

That approach contrasts sharply with more aggressive short-term commercial strategies seen elsewhere in the market.

Throughout the session, cooperation repeatedly emerged as the central message.

Eduardo Martins acknowledged that Europe sometimes reacts slowly because of its complexity and political fragmentation, but he insisted that collaboration remains the only viable path forward.

"If we do not act together," he warned, "someone else will act for us."

Miguel closed the discussion with a simple but powerful observation borrowed from a colleague sitting nearby.

"We are too small to spend our time fighting each other," he said. "We need to cooperate in order to grow and compete globally."

That final comment captured the broader tone of the session. Satellite connectivity is no longer operating on the margins of the digital economy. It is becoming a core component of Europe's future communications infrastructure, tightly integrated with terrestrial networks, data centers, cloud platforms, and sovereign digital initiatives. The challenge now is not whether these systems are needed, but whether Europe can coordinate quickly enough to secure its position within a rapidly changing global infrastructure landscape.

As AI, cloud and digital services reshape global traffic flows, FLAG is combining strategic network investment with digital transformation to deliver greater resilience, route diversity and global reach through Vision 2030.



Building the Next Generation of Global Connectivity

FLAG is expanding its global footprint, with new investment focused on increasing capacity and route diversity across India, Southeast Asia, the Middle East, Europe and the Trans-Pacific.

Through Vision 2030, this investment is strengthening key routes across the FLAG network. Between India and Singapore, FLAG will have geographically distinct connectivity via Mumbai and Chennai, giving customers additional options for routing traffic between India and Southeast Asia.

FLAG's investment in its Trans-Pacific cables connects Asia with the United States, creating new opportunities for traffic moving between India, Asia and North America. Continued investment across the Middle East is strengthening connectivity between India and Europe, creating further diversity across these key global corridors.

These investments build on a global network that FLAG has developed, owned and operated for almost four decades. By expanding across multiple corridors, FLAG can help carriers, content providers and enterprises build greater route diversity into their international networks, reduce reliance on individual pathways and strengthen business continuity.

But the network is only part of FLAG's growth. Digital transformation is central to Vision 2030, with FLAG using data, intelligence and automation to simplify operations, enhance network performance and improve the customer experience.

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3 Markets, 3 Digital Infrastructure Stories:
Ethiopia, Djibouti and Tanzania

East Africa's digital infrastructure story is changing, and it is no longer simply about laying more fibre or increasing international bandwidth. Those things remain important, but another part of the story is becoming harder to ignore: what happens once that connectivity reaches the region?

Businesses need somewhere to host their technology, and they need reliable power, access to a range of networks, places to exchange traffic and the flexibility to connect with the digital services their operations depend on. As cloud, AI and data-driven services grow in importance, these requirements are becoming increasingly interlinked.

This is what makes Ethiopia, Djibouti and Tanzania particularly interesting. They are three very different markets, with distinct economies, infrastructure requirements and digital ambitions, yet each is playing a role in the wider development of East Africa's digital infrastructure.

Demos Kyriacou, Wingu Africa's Deputy CEO, COO & Co-Founder, says: "The mission is clear: to build the digital backbone of East Africa. We're delivering at scale, with neutrality, trust, and vision, enabling the continent's digital sovereignty and future growth."



"THE MISSION IS CLEAR: TO BUILD THE DIGITAL BACKBONE OF EAST AFRICA."

That ambition is reflected in how Wingu approaches these markets. Rather than treating digital infrastructure as a single product or solution, Wingu provides environments where businesses can host, connect and expand their technology with carrier-neutral connectivity at the centre.

Ethiopia: Building for a more digital economy

Ethiopia is undergoing a significant digital shift. As businesses adopt more digital services and the country continues to develop its digital economy, demand for computing, connectivity and locally hosted infrastructure is growing, with Addis Ababa at the centre of much of this activity.

Wingu's Tier III-certified, carrier-neutral data centre in Addis Ababa gives businesses a place to deploy their infrastructure while connecting to multiple networks and digital services. The facility is also home to ADDIX, Ethiopia's Internet Exchange, which supports the exchange of local internet traffic.

The introduction of Wingu Cloud Exchange in Ethiopia adds another dimension, allowing businesses to access locally supported cloud capabilities alongside their existing infrastructure, connectivity and other cloud environments.

The opportunity is not simply to add more technology, but to create an environment in which different parts of the digital stack can work together as businesses grow.

Djibouti: Where geography matters

Djibouti has a different story to tell. Its location at the entrance to the Red Sea places it along important international connectivity routes between Africa, the Middle East, Europe and Asia, and multiple submarine cables already land in the country, giving it a significance well beyond the size of its domestic market.

Connectivity only creates value, however, when businesses can make use of it. Wingu's Djibouti data centre provides a local point where networks and businesses can deploy infrastructure, interconnect and access international connectivity, and that combination of location, connectivity and local data-centre capacity is becoming increasingly important as more digital traffic moves across the region.

For businesses operating across borders, infrastructure positioned close to major connectivity routes can also provide another option for how and where their technology is deployed.

Tanzania: Connecting international capacity with local demand

Tanzania brings yet another perspective, with a growing digital economy, a large domestic market and direct access to international submarine cable infrastructure. As more businesses digitise their operations, demand is rising for infrastructure that can support everything from enterprise systems and connectivity to cloud and other digital services.

Wingu's Dar es Salaam facility provides a carrier-neutral environment where businesses can deploy infrastructure and connect to multiple networks, while also bringing international connectivity closer to the businesses that need it.

Wingu is continuing to invest in the market, with Phase 2 of the Dar es Salaam expansion currently under construction and set to create additional capacity for organisations whose infrastructure requirements are growing.

Looking at the bigger picture

The stories of Ethiopia, Djibouti and Tanzania are different, but they point towards the same broader shift. East Africa does not need one digital infrastructure model, because different businesses have different requirements and different markets offer different advantages.

What matters is having choice: in where infrastructure is deployed, in connectivity, and in how businesses combine colocation, cloud and other technology environments. Just as importantly, it means being able to expand without starting from scratch each time requirements change.

That is where Wingu Africa sees its role. Across three very different markets, the focus remains the same: creating open, carrier-neutral environments where businesses, networks and digital services can connect.

The next stage of East Africa's digital growth will not be defined by connectivity alone, but by what the region can do with that connectivity and how effectively infrastructure can bring the two together.

That is the opportunity in front of Ethiopia, Djibouti and Tanzania, and it is one Wingu Africa is building towards every day.



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CONNECTING THE BRIDGE

Sep 22, 2026 ·

The Bridge in the Middle: Building Neutral Connectivity for MENA

When neutrality.one was founded in 2020, its founders had spent years watching the same conversation from the wrong side of the table. A multinational would commit people and revenue to the Middle East, then find that connecting it all back to the rest of the network was the hardest part of the project. Capacity was never the problem. What was missing was somewhere genuinely neutral to buy it from — not a national incumbent, not tied to one cable consortium, not quietly steering every design toward its own assets.

A region building faster than its networks

MENA is home to more than 350 million people, with a strikingly young demographic that arrives online expecting everything to be instant. Across sixteen operable markets, national Vision programmes push the same agenda at once: new tourism destinations, technology ecosystems built from scratch, and an energy sector transitioning away from the resource that funded it.

The connectivity market is tracking that ambition. Research and Markets put the MENA managed network services sector at around $3.12 billion in 2023, growing at roughly 9.4% a year to $5.86 billion by 2030.

Hard to navigate, and short of neutral ground

That growth story rarely mentions how different each market is to operate in. Licensing regimes, permitted service models, landing rights, presence requirements and data rules vary from

one border to the next. Most international projects slow down here — not on engineering, but on navigation.

The region also has few carrier-neutral meeting points of the kind Europe and North America take for granted, so decisions get made around whichever provider the customer started with rather than around what the traffic needs. Sitting outside the incumbent structures lets neutrality.one be a single front door to the region: one contract, one catalogue, one set of SLAs, while the paths underneath are assembled from whichever carriers, cables and facilities genuinely suit that route.

Standing where three continents meet

Geography is the region's great commercial advantage. The Suez Canal, the Strait of Hormuz and Bab elMandeb are not only shipping routes; they mark the corridor through which much of the world's data moves between Europe, Africa and Asia. Traffic between London and Singapore is likelier to pass through this region than around it.

Continental Express, the company's flagship route product, is built on that position. Rather than treating MENA as a destination to be reached, it treats the region as the junction it is — an engineered corridor connecting Gulf and Levant markets back into the major European and Asian hubs, on paths chosen for the shortest achievable round trip rather than the cheapest available capacity.

Around that core sits everything else needed to connect the enterprise end to end: IP transit, business and dedicated internet access, last-mile, mobile and satellite connectivity, colocation, and low-latency paths for mission-critical applications, all designed, delivered and supported by the company's professional services team. One partner, turnkey.

Latency, and what happens when a cable breaks

For a growing set of customers, milliseconds are the product. Trading venues, market data feeds, payment platforms and AI inference workloads all behave differently depending on how far and how cleanly their packets travel. What they want is not a headline speed but a predictable one, and enough diversity that a single fault does not quietly change their numbers.

The past two years proved the point. Repeated subsea cable damage in the Red Sea took major systems out of service for months, and many organisations discovered that several supposedly independent circuits shared the same stretch of seabed. neutrality. one rebuilt Continental Express around the assumption that any corridor can fail: it now offers options via Iraq and Turkey, via Saudi Arabia and Jordan, and via Mediterranean paths — diversity that does not share the same waters, consortium or repair queue.

The part customers actually remember

Routes get a company onto the shortlist; service is what keeps it there. The things that go wrong in this region — a cable cut, a permit delay, a cross-border escalation — are rarely solved by a ticket number.

neutrality.one runs a 24x7 network operations centre backed by its own engineering team, so the person investigating an incident understands the design rather than reading from a script. Multi-vendor coordination is handled in-house: customers escalate once instead of chasing four suppliers across three time zones. Through the Red Sea outages, that is what held accounts together — proactive rerouting and one owner for the problem throughout.

Why the timing matters

Data centre construction across the Gulf is running well ahead of historic norms, the hyperscalers have committed to in-region availability zones, and sovereign AI programmes are arriving at a pace that seemed improbable three years ago. All of it has to be reached, increasingly by other data centres moving very large volumes of training and inference traffic between them. Meeting that with a patchwork of single-country arrangements is difficult; meeting it with one neutral partner who can engineer and operate the whole path is considerably less so.

Looking ahead

Oman shows where this is heading: outside the Red Sea chokepoint, invested in subsea landings and data centre capacity, and quietly positioning itself as an alternative gateway.

The founding argument has not changed since 2020 — the region deserves a connectivity partner whose only interest is the customer's traffic.

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Information Technology

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Ritorica helps businesses build stronger customer relationships by providing easy-to-use communication services.Whether for marketing campaigns, alerts, or customer notifications, our platform ensures messages are sent securely, quickly, and in a way that grabs attention.

Since it started, Ritorica has become a global leader in digital communication, working across Europe, Asia, the Middle East, and Africa. While initially focused on SMS services, Ritorica has since expanded to offer a full range of multi-channel messaging solutions, keeping up with the fast-evolving digital world.

Products and Solutions:

SMS Messaging:
A simple, effective way to send instant updates.

WhatsApp Business API:
Allows for personalized and interactive conversations with customers.

Telegram Gateway:
Cost-effective and privacy-focused solution for user authentication.

Viber Messaging:
Enables more engaging messages with multimedia content.

Push Notifications:
Sends real-time updates through in-app notifications.

Flash Calls:
Quickly reach customers with automated voice alerts that grab attention.

Voice Code:
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To better serve businesses, Ritorica has developed several unique platforms adapted to different needs:

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Built for seamless multi-channel messaging, it lets businesses connect via SMS, messengers, social media, and push notifications. Its smart channel queuing (cascade) ensures every message takes the most effective route. With broad protocol support and secure delivery at scale, it's your engine for reliable, high-volume communication.

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Ritorica continues to innovate and expand, aiming to develop new technologies that help businesses maintain strong customer connections in an increasingly digital world.

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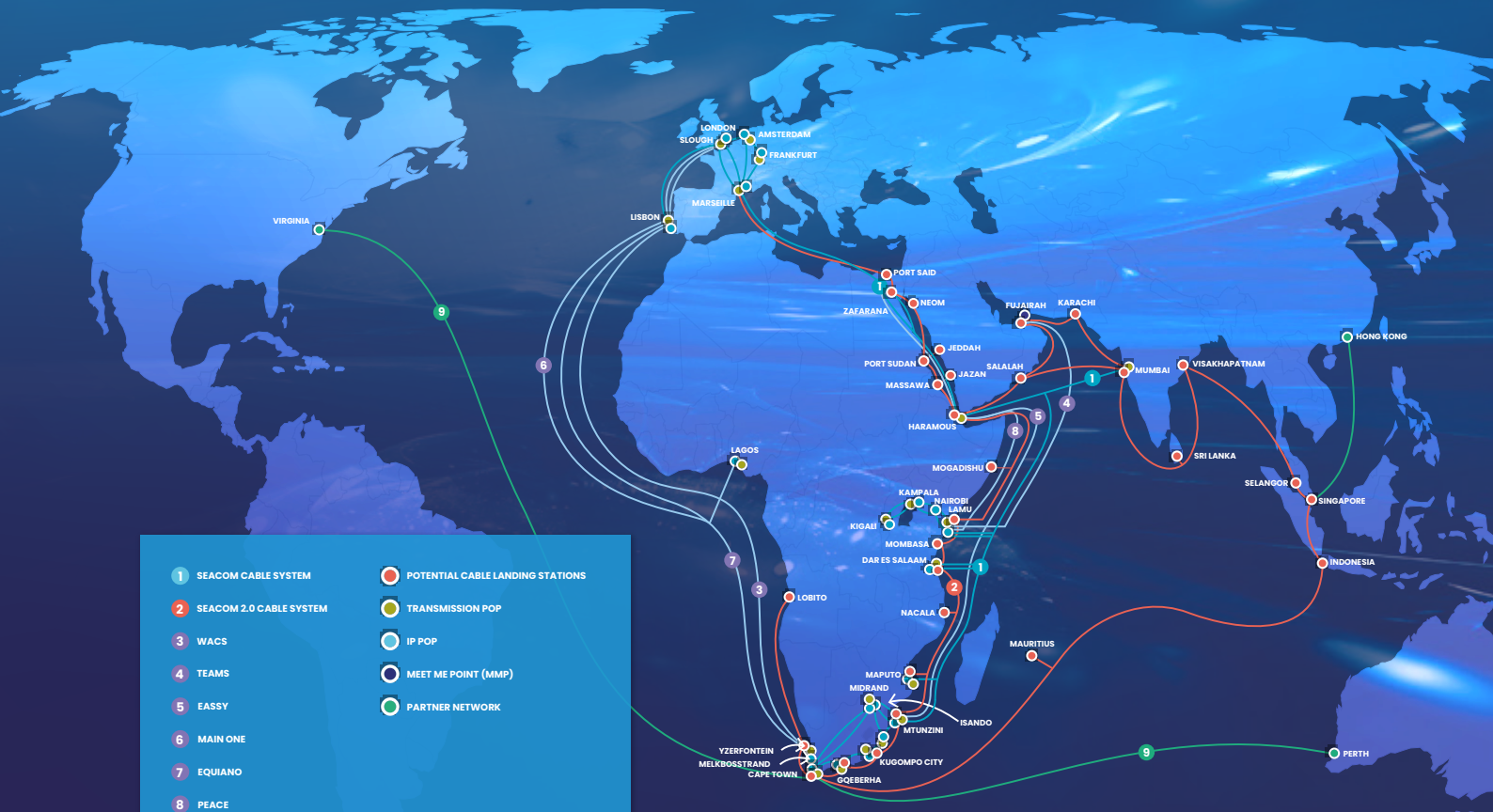
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Introduction:

Saif Telecommunications, established in 2006, has transformed from a calling card venture into a pioneering VOIP powerhouse with nearly two decades of expertise. Specializing in Retail and Wholesale Voice alongside robust SMS solutions, Saif forges seamless connections across Asia, the Middle East, and Africa, partnering with global giants such as IBasis, BICS, China Mobile, Telstra, and Korea Telecom. Celebrated for its agility, reliability, and secure services, Saif continues to raise the bar in global communications.

"WE SEE OUR CUSTOMERS AS INVITED GUESTS TO A PARTY, AND WE ARE THE HOSTS,"

Echoing Steve Jobs' words, *"Innovation distinguishes between a leader and a follower,"* Saif thrives on disruptive thinking and forward momentum. Inspired by Jeff Bezos' philosophy, *"We see our customers as invited guests to a party, and we are the hosts,"* customer-centricity remains the soul of its mission driving resilience, progress, and excellence across borders.

CEO's Motive:

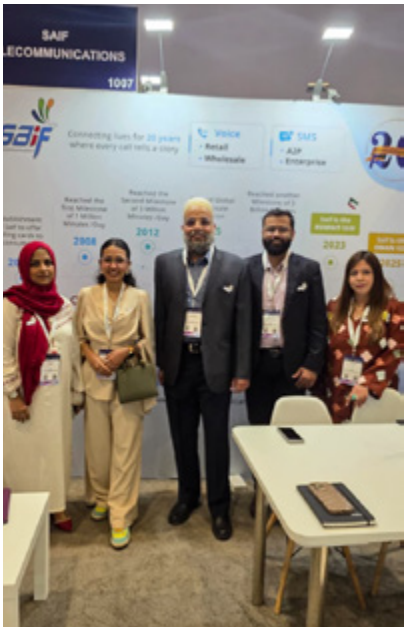
Yousuf Makkawala, the visionary Founder and CEO of Saif Telecommunications, has been the architect of its transformative journey since inception. With unyielding passion and foresight, he has reimagined challenges as springboards for growth, steering the company to unprecedented heights.

His leadership blends inventive strategy with an inspiring ability to ignite collective ambition, nurturing a culture where creativity and collaboration are not just encouraged but celebrated. Guided by his forward-thinking approach, Saif Telecommunications has evolved into a global force, continually reshaping the boundaries of connectivity.

At the core of this evolution stands Yousuf himself resilient, pioneering, and unwavering charting new horizons in an ever-shifting telecommunications landscape.

Oman's IGW:

We are proud to celebrate a significant milestone with our partnership for Oman's IGW (International Gateway) license. This achievement reflects years of dedicated effort, strategic planning, and the ability to navigate



the ever-evolving telecommunications landscape. It reinforces our position as a leading industry player, empowering us to expand our reach, enhance connectivity, and deliver superior services to our partners and customers. More than just a license, this milestone embodies our commitment to innovation, resilience, and continuous growth, driving us forward in our pursuit of excellence on both regional and global stages.

Expanding Global Footprint:

With a strong and established presence across Asia and the Middle East, Saif Telecommunications has built a trusted network of partnerships, interconnections,



and expertise across key global telecom markets. Building on this foundation, Saif has now expanded its footprint across Africa, opening new avenues for connectivity, international voice exchange, and strategic partnerships. This expansion marks an important step in Saif's global journey, strengthening its position as a truly international telecommunications player and connecting markets across Asia, the Middle East, and Africa.

Team Achievements: Powering the Next Chapter

As Saif Telecommunications enters its third decade, its achievements continue to reflect the strength of a team built on ambition, agility, and execution. Over the past year, the team has continued to expand its global connectivity footprint, strengthen relationships with leading telecom operators, and deliver at scale, further reinforcing Saif's role as a trusted force in the international telecommunications landscape.

Yet the numbers tell only part of the story. Behind every successful connection is a team that anticipates challenges, responds with agility, and continuously looks for ways to raise the standard. From commercial and technical teams to the backend operations that keep the network moving seamlessly, every function plays a critical role in turning complex demands into reliable solutions.



Equally important is the investment in people. By nurturing emerging talent, sharing knowledge, and creating an environment where ideas can evolve into solutions, Saif is building capabilities for the years ahead. As the company celebrates 20 years of progress, its greatest achievement remains the people behind the progress, united by purpose, driven by excellence, and ready to shape what comes next.

Beyond Horizons: Saif at 20

Twenty years is more than a milestone; it is a measure of vision, resilience, and the ability to evolve with a changing world. To mark two decades of Saif Telecommunications, the team gathered in Bali, a destination that offered the perfect setting to pause, reflect, and celebrate the journey. Amid its tranquil shores, rich culture, and breathtaking landscapes, colleagues came together not simply to commemorate the past, but to recognize the people and shared ambition behind Saif's evolution. Over two decades, Saif's story has been shaped by bold decisions, enduring partnerships, continuous innovation, and a culture that places people at the heart of progress. The Bali experience captured that spirit, an opportunity to step beyond the everyday, reconnect as one team, and look toward the next horizon with renewed energy. As Saif enters its third decade, the celebration served as a reminder that the strongest legacies are not defined solely by the years behind them, but by the possibilities they create for what comes next.







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WHY ROUTE DIVERSITY IS CRITICAL TO RESILIENT GLOBAL CONNECTIVITY

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Subsea cables have long been the invisible backbone of the internet, carrying more than 95% of global data traffic beneath the ocean's surface. Today, they are no longer just background infrastructure, they sit at the centre of an increasingly complex digital and geopolitical landscape.

The rise of artificial intelligence, alongside continued cloud expansion and hyperscale data centre growth, is driving unprecedented demand for high-capacity, low-latency connectivity. Investment in subsea infrastructure is accelerating accordingly, with global spend expected to reach around $13 billion between 2025 and 2027, nearly double the previous three-year period.

At the same time, geopolitical tensions and physical risks are exposing the fragility of existing networks. Recent cable disruptions in strategically important regions have demonstrated how easily connectivity can be affected when too much traffic depends on shared pathways.

In this environment, resilience is no longer just about adding capacity or redundancy. It's about ensuring networks can withstand disruption. This is where true route diversity becomes critical.

The growing pressure on global connectivity

Subsea fibre-optic cables underpin cloud platforms, financial systems and increasingly, AI workloads that rely on constant data exchange between globally distributed infrastructure.

Several forces are reshaping demand:

- AI and machine learning are driving large-scale data transfer between data centres.
- Increased reliance on real-time applications where latency and uptime are critical.
- Rapid expansion of hyperscale infrastructure across Asia, the Middle East and Europe.
- Heightened awareness of infrastructure risk linked to geopolitics and physical chokepoints.

This is forcing a shift in how networks are designed, particularly along key corridors such as Asia to Europe, where multiple systems often converge along similar paths.

Route diversity vs. route duplication

A common misconception is that resiliency comes from simply increasing the number of subsea cables. In reality, multiple cables that follow the same geographic path offer limited protection against disruption.

True route diversity means:

- Avoiding shared physical paths and high-risk chokepoints.

Many Asia-Europe routes pass through narrow, high-traffic areas such as the Gulf of Suez and the Gulf of Aden. These are concentrated risk zones where a single incident, whether accidental damage or geopolitical disruption, can impact multiple

"BY COMBINING SUBSEA CABLES WITH TERRESTRIAL FIBRE ROUTES, OPERATORS CAN BYPASS CONGESTED OR HIGH-RISK SEGMENTS."

systems at once. Avoiding these overlaps is essential to reducing systemic vulnerability.

- Creating geographically distinct corridors between regions.

Route diversity requires building entirely separate pathways between regions. This means using different maritime corridors, landing points and regional pathways so that traffic is not dependent on a single route. For Asia-Europe connectivity, this is critical to ensuring continuity when disruption occurs.

- Integrating subsea and terrestrial infrastructure where possible.

Hybrid network design is increasingly important. By combining subsea cables with terrestrial fibre routes, operators can bypass congested or high-risk segments. This enables more flexible routing, faster recovery and reduced reliance on any single part of the network.

Together, these principles move resilience beyond simple redundancy to truly independent connectivity.

Strengthening Asia-Europe connectivity through diverse routing

The Asia-Europe corridor is one of the most critical global data routes, supporting cloud services, financial systems and AI-driven workloads. It is also one of the most exposed, with many cables historically concentrated along similar paths.

As a result, the focus is shifting from simply adding capacity to building multiple independent pathways. This includes:

- Using different maritime corridors to reduce congestion and risk concentration.
- Expanding landing points across Asia, the Middle East and Europe.
- Combining subsea and terrestrial links to bypass traditional bottlenecks.
- Enabling dynamic traffic routing to maintain service during disruption.

This approach ensures that if one route is impacted, traffic can be seamlessly rerouted, maintaining performance and continuity.

When planning subsea cable investments, PCCW Global ensures that it can provide geographically diverse routes, which offer new entry and landing points across different countries - thereby reducing reliance on existing corridors and enhancing overall network resilience.

Why route diversity matters more than ever

As dependence on digital infrastructure becomes more critical, the consequences of disruption continue to grow. A single cable failure can affect millions of users and disrupt essential services.

Route diversity helps mitigate these risks by delivering:

- Greater resilience, reducing the impact of outages.
- Improved reliability through independent routing options.
- Enhanced performance via flexible traffic management.
- Reduced exposure to physical and geopolitical risk.

In a world where infrastructure is increasingly stressed and scrutinised, resilience is no longer optional.

Looking ahead

The subsea cable industry is entering a new phase, shaped by AI, cloud expansion and geopolitical realities. Investment is accelerating, but so is the need for more strategic network design.

The future of connectivity will depend on:

- Building geographically diverse routes rather than concentrated corridors.
- Integrating subsea and terrestrial infrastructure into unified networks.
- Prioritising resilience as a core design principle.

In this evolving landscape, route diversity will not only determine network performance, but also the stability and continuity of the global digital economy.

To learn how PCCW Global's network can support your connectivity needs between Asia and Europe, get in touch with our team at sales@consoleconnect.com.

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, Turkiye'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 Turkiye'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 Turkiye, 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

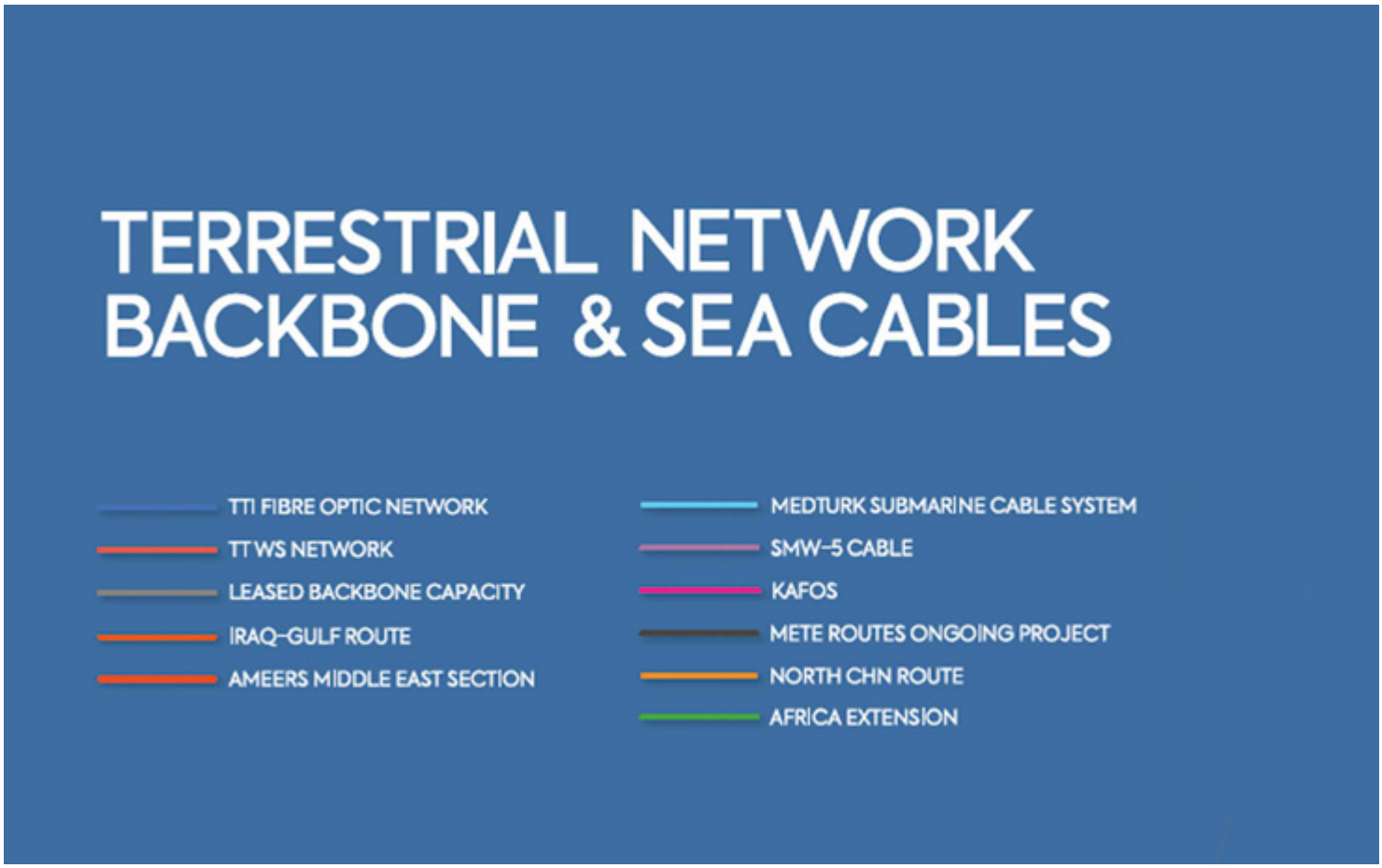
The General Manager of Türk Telekom International, Yavuz Yildirim explains that what sets TTI apart from competitors is that it provides a geographic bridge connecting three continents – something unmatched in CEE. Also, it is able to offer its customers a comprehensive portfolio with Dark Fiber, Managed 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 Turkiye-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.



PHOTO BY: TÜRK TELEKOM INTERNATIONAL

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



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 Turkiye, 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.



IS AN ANTENNA CRITICAL? DEPENDS WHO IS PAYING.



By
NASSIA SKOULIKARITI
CEO of Apiro Data

A good deal of this industry's strategy is kept in its definitions, and every so often somebody moves one.

Recently it was Germany. The federal network agency sent a draft rule to the European Commission which says that every function of a 5G base station is a critical function. Light Reading's account of the filing is worth reading in full. One sentence of regulatory prose, and the radio network, the masts and antennas that make up most of what an operator physically owns, moved from one side of a line to the other.

That line has been carrying weight. Huawei supplies roughly fifty eight per cent of Germany's radio sites, about forty six thousand of them by Strand Consult's count. In 2023 the chief executive of Deutsche Telekom asked aloud, at a conference, if an antenna is a critical element, and answered that German law did not see it as one. He was right. That was the law. In 2024 the operators agreed to take Chinese equipment out of the core of their networks by the end of this year, and the radio side stayed where it was, on the grounds that it was a different category of thing.

I have no view to offer here on the security question, which belongs to people with clearances. What interests me is how much work one adjective was doing. For as long as the word critical stopped at the core, nobody had to decide anything about the antennas. The decision was stored in the definition, which is a comfortable place to keep a decision you do not much want to take.

Then there is the price of changing your mind, which has been described for years as prohibitive. Strand puts the German job at under two and a half billion euros, around five per cent of what the three operators take in revenue in a single year. The operators' own trade body told Brussels in July that the bill across the European Union is thirty five billion. Both numbers can be right. Set the German figure against revenue and it looks modest. Set it against what the largest of those operators spends on radio equipment in a normal year and it is close to four years of budget. Everybody in this argument has picked the denominator that suits them.

"THE INTERESTING PART OF THE GERMAN FILING IS NOT THE MONEY. AN ARGUMENT MADE IN GOOD FAITH, BY SERIOUS PEOPLE, FOR YEARS, WAS RESTING ON A WORD THAT A REGULATOR CAN CHANGE IN A PARAGRAPH."

Anybody in the carrier business knows this habit from the inside, for the simple reason that we live by it. Is a message person to person or application to person? Is a call national or international, is a route direct, is the traffic on net? None of those is a fact of nature. Each is a line somebody drew, and the price sits on one side of it. We spend years defending where the line is and call it principle, and then the line moves and it turns out to have been a commercial position all along.

The interesting part of the German filing is not the money. An argument made in good faith, by serious people, for years, was resting on a word that a regulator can change in a paragraph. The antennas are the same antennas they were in September. Nothing about them is more or less safe than it was. What has changed is that the operators now have to say what they think, where before it was enough to say what the law said.

I understand why it happens, and I do not think it is cowardice. A decision has a name on it and a date, and somebody can be asked about it later. A definition has neither. It arrives from a standards

Byti Technologies

Omnichannel Made Simple

"Byti Technologies is a global telecom and CPaaS solutions provider, with offices in Singapore, India, Egypt, and the UAE. We specialize in secure, reliable, and scalable communication solutions for enterprises, mobile network operators, and wholesale carriers.

With reach to 800+ carriers through 250+ channel partners, and relationships with leading Tier-1 aggregators, Byti delivers high-quality messaging services across 150+ countries. Our primary focus is the Asia-Pacific and Middle East regions, with an expanding presence across Europe and Africa.

Our portfolio includes A2P SMS, Voice, WhatsApp Business, RCS, Email, SMS Firewall, and telecom security solutions, helping organizations strengthen customer engagement while maintaining the highest standards of security, performance, and reliability.

As a GSMA Member, GLF Member, GCCM Associate Partner, and an ISO 27001:2022 and ISO 9001:2015 certified company, Byti is committed to delivering trusted communication infrastructure that businesses can rely on. We believe secure connectivity should never compromise speed or simplicity. By combining enterprise-grade security, responsive support, flexible commercial models, and consistent delivery quality, we help our partners build stronger customer relationships and grow with confidence."



Who leads the satellite IoT race?

Satellite IoT is entering a phase where points of difference extend beyond just connectivity. While satellite networks remain critical in connecting assets beyond the reach of terrestrial networks, the question now turns to how well providers can connect devices, integrate with terrestrial networks and enable enterprises to scale their deployments.

As established satellite IoT providers expand their propositions while newer players bring satellite connectivity closer to the cellular ecosystem, the market is becoming less about satellite coverage and more about what surrounds it. Devices, modules, standards, mobile network operators, applications, partnerships and commercial execution are all becoming part of the competitive equation.

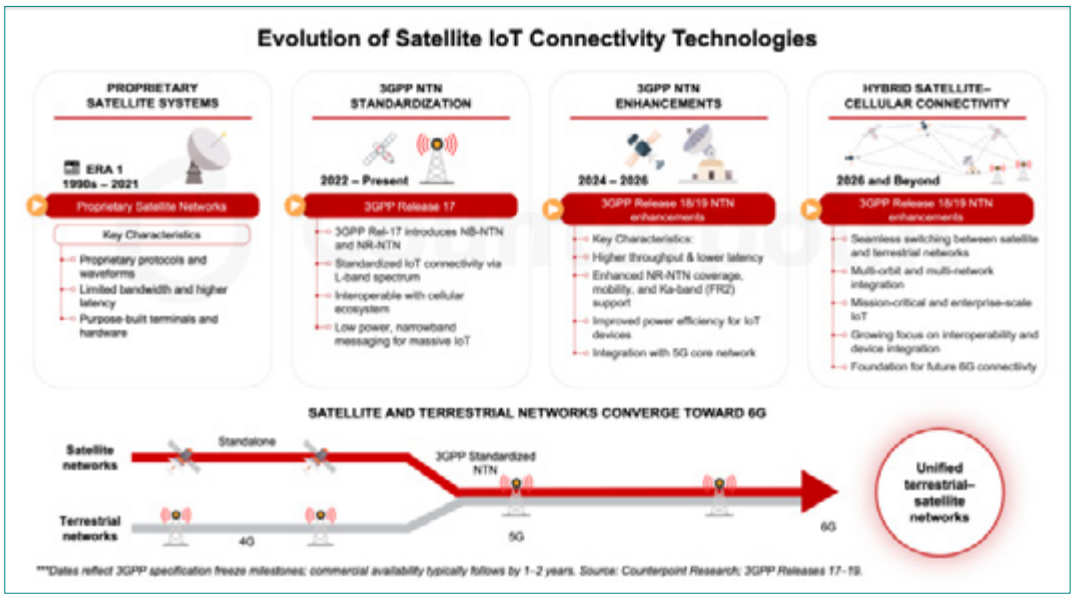
Satellite IoT moves beyond niche connectivity

Satellite IoT has traditionally addressed an obvious requirement: connectivity of remote assets where terrestrial networks are unavailable or unreliable. While this holds true across transport, maritime, agriculture, mining, energy, utilities and environmental monitoring, satellite is becoming part of a wider connectivity architecture rather than a standalone solution for remote assets.

"THREE KEY DEVELOPMENTS ARE SHIFTING THE MARKET TO EMBRACE SATELLITE AS A BROADER ENABLER."

Three key developments are shifting the market to embrace satellite as a broader enabler.

- 3GPP NTN is bringing satellite closer to the cellular ecosystem to make it easier to use satellite alongside existing IoT devices and networks.
- Hybrid satellite cellular connectivity is also gaining significance, where devices can leverage both terrestrial networks where available and satellite when out of coverage.
- The ecosystem is broadening beyond the traditional satellite players into mobile operators, chipset and module vendors, along with device makers and IoT platforms. Collectively, this is driving towards satellite being part of the IoT connectivity stack rather than a standalone option for remote assets.



The shift is evident in how providers are shaping their propositions and partnerships, with standards-based NTN enabling this convergence and hybrid architectures allowing satellite and terrestrial networks to work together rather than as separate layers of connectivity.

Skylo is an example of this transition, with the brand's proposition grounded on standards-based NTN and convergence with the existing cellular ecosystem. Its partnership with Vodafone IoT sees the integration of its network cores that enable compatible devices to switch between cellular and NTN connectivity using a single SIM.

Convergence is also being driven by standards-based device connectivity. Sateliot's network is based on 3GPP NB-IoT NTN, and its partnership with Telenor IoT aims to enable compatible NB-IoT devices to transition between terrestrial and satellite networks without requiring proprietary satellite hardware, thereby broadening the reach of satellite connectivity to the existing cellular IoT ecosystem.

Established providers are also broadening their propositions to include hybrid and standards-based connectivity. Iridium is adding hybrid and standards-based features to its established satellite IoT business, with the Iridium 9604 combining satellite, LTE-M and GNSS in a module, and its NTN Direct roadmap. Viasat, on its acquisition of Inmarsat, has also broadened its satellite portfolio to encompass Inmarsat's IoT Nano service built upon Inmarsat's existing narrowband IoT capabilities.

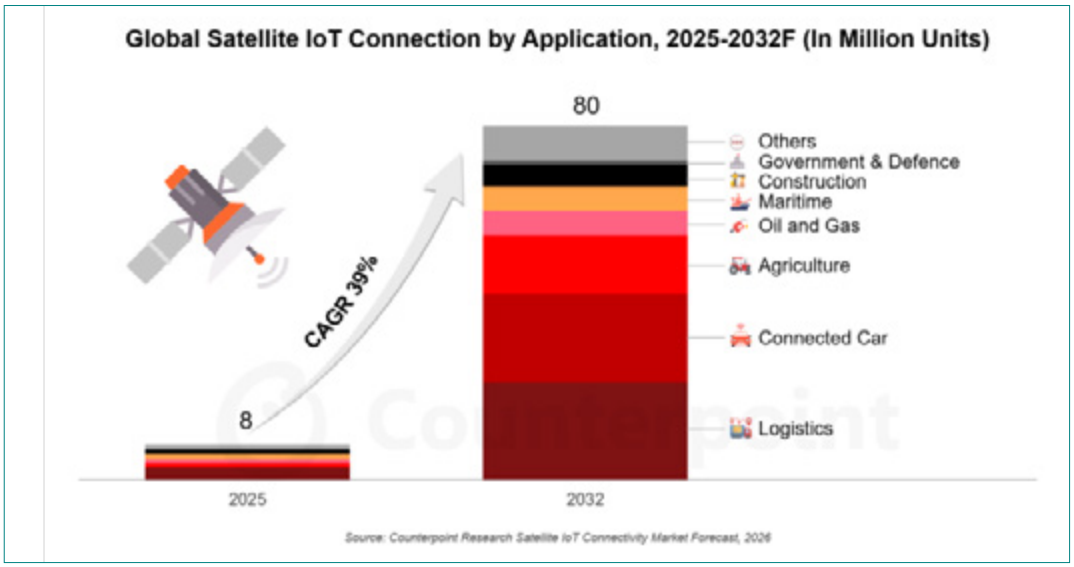
ORBCOMM is extending its industrial IoT proposition through SkyWave and hybrid satellite cellular connectivity, and Globalstar is moving beyond its traditional tracking offerings with the two-way RM200M module. Similarly, Myriota is combining its low power satellite proposition with cellular connectivity through HyperPulse.

The common theme is that although not all players are adopting the same technology, satellite connectivity is becoming more enmeshed in the wider IoT stack from networks, devices, platforms and enterprise connectivity. This is broadening the role of satellite from specialist solution for remote assets to being an adjunct within wider IoT deployments.

The satellite IoT market is entering a new competitive phase

This technology shift is opening a much larger market opportunity. According to Counterpoint Research's Global Satellite IoT Connectivity Market Forecast, global satellite IoT connections are expected to grow from around 8 million in 2025 to more than 80 million by 2032, reflecting how satellite connectivity is moving beyond the specialised market for remote assets and into a much broader IoT opportunity.

However, most satellite IoT connections today still run on proprietary satellite networks, while standards-based NTN is gaining momentum.



There are multiple factors that will contribute to this growth trajectory.

- 3GPP NTN standardisation will reduce the satellite-specific component in IoT devices.
- Declining module prices and satellite-specific costs will allow for a broader adoption of satellite connectivity.

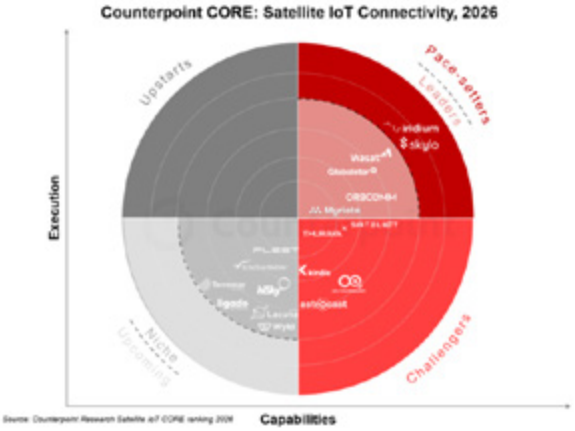
The application opportunity is broadening at the same time. Logistics is seeing demand for satellite connectivity to track containers, trailers and other assets beyond terrestrial coverage while agriculture is creating opportunities to connect livestock trackers, farm equipment and remote sensors across areas with limited cellular coverage. Automotive represents a longer-term opportunity as satellite connectivity becomes more closely integrated with connected vehicle architectures, particularly for emergency and safety-related applications.

The market is consequently attracting providers with very different starting points. Established operators such as Iridium, Viasat, ORBCOMM and Globalstar bring existing networks, customers and deployment experience. Newer players such as Skylo, OQ Technology, and Sateliot are targeting the market from different angles and leveraging novel approaches such as NTN standardisation, hybrid solutions, partnerships with mobile operators, and alternative hardware designs. This makes the competitive landscape more complex and nuanced than it may seen at first glance. Ultimately, the question of which company will be positioned to capture the largest share of the satellite IoT market will require a closer examination of the competitive dynamics and nuances of each player's approach.

Counterpoint's satellite IoT connectivity CORE rankings 2026

Counterpoint's Satellite IoT Connectivity CORE Rankings evaluate providers of satellite IoT in terms of capabilities and execution level required to compete as the market grows. The assessment looks beyond satellite coverage to consider the broader factors that determine a provider's ability to enable and scale IoT.

The assessment considers network and technology capabilities, performance and reliability, scalability and operational readiness, device ecosystem and deployment, platform and integration, regulatory readiness and market execution. These parameters capture the underlying strength of each proposition and how effectively providers are translating those capabilities into the market.



The results place providers across six categories. Pacesetters combine strong capabilities with broad execution across the market. Leaders have established positions and well-rounded capabilities, while Challengers show significant strengths with further potential to build scale and market reach. Upstarts are at an earlier stage with a good approach to market but still adding capabilities to offerings that could gain importance as the market develops. Niche players have established defensible positions through specialised technologies, vertical expertise or regional advantages.

In Counterpoint's 2026 CORE assessment, Iridium and Skylo emerge as the Pacesetters, although their strengths come from different positions in the market. Iridium combines a mature global LEO network, an established IoT base and broad partner ecosystem with continued investment in hybrid and standards-based connectivity. Its Iridium 9604 and NTN Direct roadmap extend its opportunity across new device architectures and standards-based connectivity. Meanwhile, Skylo is pushing the market toward standards-based NTN through deep integration with mobile operator, chipset and device ecosystems.

Viasat occupies a different position. The combination of Viasat and Inmarsat gives the brand considerable breadth across satellite connectivity and established enterprise markets. The acquisition also brought together complementary network assets and an existing narrowband IoT business, providing a broader foundation from which to address the satellite IoT opportunity.

ORBCOMM and Globalstar stand out for the depth of their existing IoT businesses. ORBCOMM's long-standing focus on industrial applications gives it strong deployment experience and an established route to enterprise customers, while Globalstar is building on its tracking heritage as it expands its two-way IoT proposition.

Further across the ranking, Myriota and Sateliot illustrate how more focused technology strategies are creating alternative routes into the market. Myriota is extending its established low-power proposition into newer hybrid architectures, while Sateliot is pursuing a standards-led model closely connected to the mobile ecosystem.

What separates the leaders from the challengers?

Narrowing gap – The CORE assessment shows that the gap between leaders and challengers is narrowing in terms of connectivity capabilities. As the market develops, execution is becoming an equally important differentiator.

- Areas of differentiation – Three areas – device integration, interoperability and commercial execution – differentiate challengers from leaders. Device integration is becoming important as satellite connectivity moves closer to the cellular ecosystem, while interoperability will determine how easily devices can operate across terrestrial and satellite networks. Commercial execution is equally critical, covering partnerships, distribution, customer support and the ability to turn technology into repeatable deployments.
- Incumbent advantage – This is where established providers have an advantage through existing deployments and customer relationships, while standards-led providers can compete by making satellite connectivity easier to integrate into the broader IoT ecosystem. Ultimately, the ability to combine technology with ecosystem strength and commercial execution will determine who can scale.

Looking ahead: what will shape market leadership?

As satellite IoT moves toward larger enterprise deployments, the leaders will be those that can turn technical capability into products that are easy to deploy, integrate and scale. The value of hybrid connectivity will be particularly important for applications such as logistics, agriculture, utilities and industrial equipment, where devices can use terrestrial networks where available and satellite beyond coverage. The market is still at an early stage of development, giving established providers an advantage through network scale, installed deployments and commercial experience. At the same time, standards-led providers are creating new routes into the broader cellular IoT ecosystem. As adoption expands, the competitive landscape is likely to evolve, with future leadership depending increasingly on deployment scale, ecosystem strength, interoperability and ease of integration, rather than connectivity capability alone.

Conclusion

The satellite IoT market is still in an early stage, with more players expected to join the momentum, as they complete their portfolios implying more competitive market dynamics. The market opportunity is significant, with satellite IoT connections expected to grow 10x in seven years. Nevertheless, finding the right execution strategy and partnerships will be crucial. Pacesetters are expected to continue pioneering based on their foundations, challengers and leaders are expected to see much tighter competition as providers try to play to their strengths and attract more customers.

September 24, 2026
Source: https://iot-now.com/2026/09/24/158464-who-leads-the-satellite-iot-race-counterpoint-core-2026/

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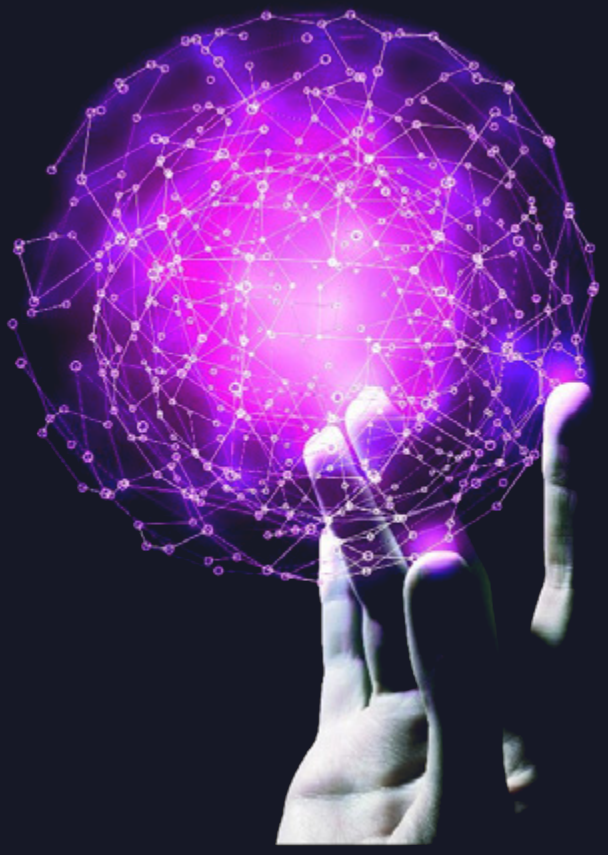
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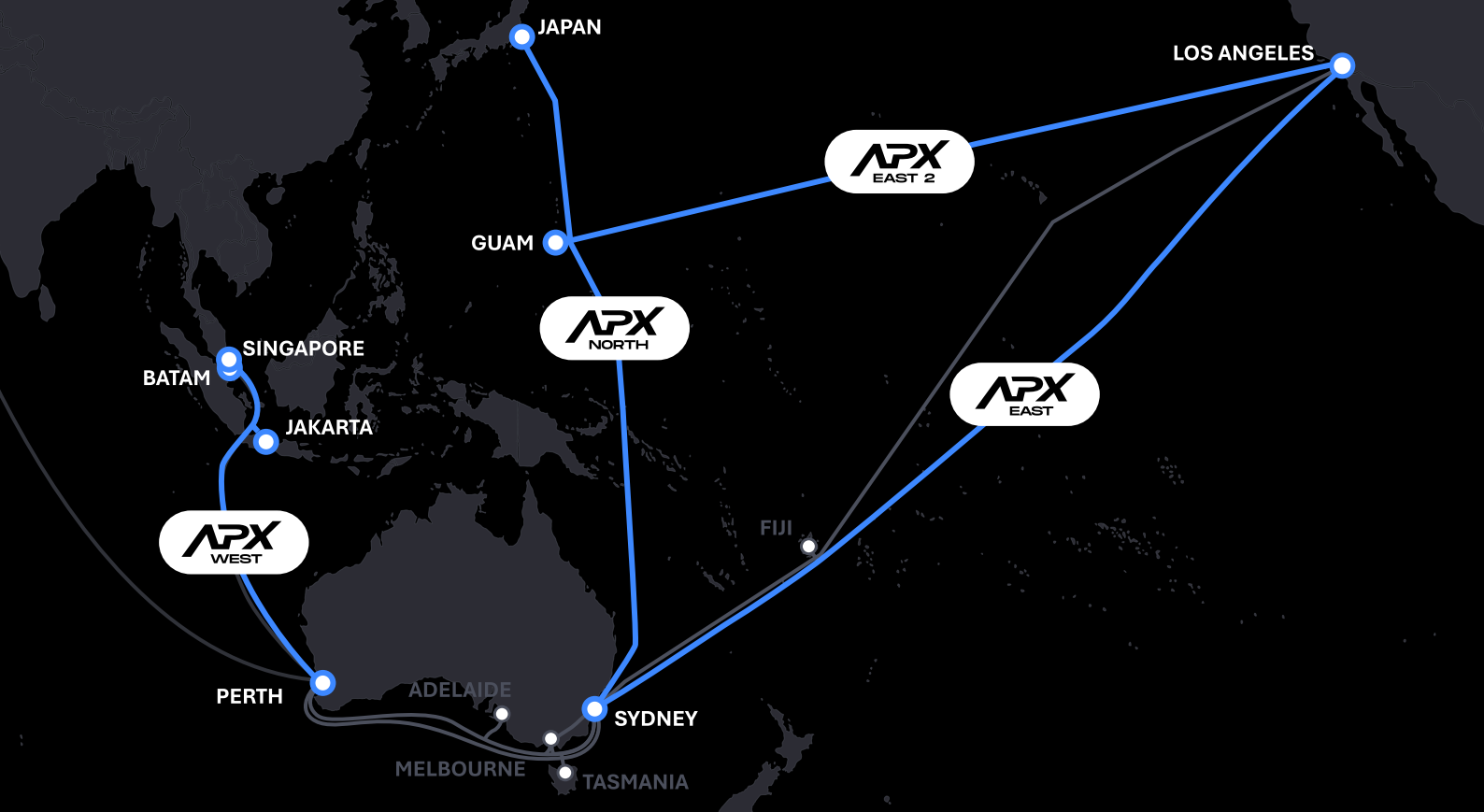
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Messaging businesses rarely become complex by design. Complexity tends to emerge gradually as the business grows, new customer segments require additional capabilities, messaging channels are added to the portfolio, signalling becomes part of the operation, and growing numbers of customers and suppliers introduce new pricing models, financial processes and operational workflows.

Each step makes sense on its own, but as the business expands, so does the number of technologies, interfaces and processes required to support it. What begins as a natural response to new business opportunities can therefore gradually lead to a fragmented technology environment that becomes increasingly difficult to manage.

This principle is at the core of the **HORISEN Messaging Ecosystem,** which brings technologies across four key pillars - **Messaging Core, User Engagement, Signalling & Connectivity, and Data & Assets** - into one modular environment. Individual platforms can operate independently, giving companies the flexibility to introduce the capabilities they need as requirements evolve, while also allowing those technologies to become part of a broader ecosystem. However, as that ecosystem expands, **reducing fragmentation** is no longer only a question of how individual technologies are built and connected.

New messaging channels, signalling capabilities, portability data or asset management can be introduced alongside existing technologies, while the operational environment becomes increasingly centralized as more capabilities are brought together. The Messaging Ecosystem and **Messaging Operating System** therefore address different dimensions of the same challenge. The Ecosystem provides the modular technologies required to build and expand a messaging business, while **mOS provides the common operating layer** that connects the processes behind them.

As messaging continues to evolve across technologies, channels and business models, the infrastructure supporting it will inevitably evolve as well. The challenge is therefore not to avoid complexity altogether, but to build technology in a way that prevents necessary expansion from becoming unnecessary fragmentation. For HORISEN, this means **combining modularity at the technology level with greater unification at the operational level**, creating an environment in which messaging businesses can continue to expand their capabilities without having to rebuild the technology and processes behind them each time they grow. The operational processes behind them also need to work together if technological expansion is not to create new complexity elsewhere in the business.

HORISEN Messaging Operating System (mOS) extends the same principle of integration to this operational layer. As a **unified OSS/ BSS orchestration layer** across the Messaging Ecosystem, mOS centralizes key processes including system configuration, user access and financial management, while enabling orchestration between different HORISEN technologies.

Combining modular technology with a common operating layer gives messaging companies greater flexibility in how their business develops. A company can strengthen its Messaging Core and later introduce capabilities from User Engagement, Signalling & Connectivity or Data & Assets as new requirements emerge, without every addition having to become a separate technology and operational environment. For messaging providers, carriers and aggregators, this creates a more consistent path for expanding their offering.



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Saudi Arabia Builds an **AI Power Base** Between China and the US

During the first week of September, LEAP 2026 took place in Riyadh, where Saudi officials and Chinese technology companies expanded cooperation across AI, cloud, robotics, hardware and networks, showing how Saudi Arabia telecom companies became essential for domestic technology capacity.

Under Vision 2030, Saudi Arabia wants global technology companies to build infrastructure, manufacture products, train workers and operate platforms locally. That ambition is turning the Kingdom into an interesting testing ground for Chinese technology as competition with the US takes a deeper route into AI and digital infrastructure.

Building Saudi Arabia's AI Backbone

The growing presence of Huawei in Saudi Arabia highlights the nature of the expanding relationship beyond telecom equipment. Huawei used LEAP to promote a full-stack AI strategy combining networks, computing, cloud systems and applications for government, finance and energy.

The size of Saudi Arabia telecom provides a strong foundation. The Kingdom's Information and Communication Technology (ICT) market has reached $53 billion, up 89.5% since 2017, while the digital economy now contributes 16% of GDP and 5G coverage has reached 86%.

For Saudi Arabia telecom operators, however, the next stage is no longer simply about expanding mobile coverage. AI systems require faster data-center connections, automated networks, large computing clusters and reliable low-latency infrastructure.

Huawei is promoting Agentic RAN, AI OTN and AI WAN alongside 5G, routers and DWDM technology.

The expansion of ICT Saudi Arabia is also moving into the hardware that powers AI. Huawei says it invests more than 20% of annual revenue in research and development, covering network chips, general-purpose processors, AI chips, storage and optical modules.

That gives Saudi Arabia telecom companies access to infrastructure

such as Huawei's Atlas SuperPoD, which supports up to 8,192 NPUs for large AI workloads. Huawei is also building an ecosystem around HarmonyOS, openEuler and GaussDB.

Sovereign cloud is another important part of Huawei in Saudi Arabia. Huawei Cloud operates three availability zones under the Kingdom's Class C security classification, keeping data within Saudi borders while offering response times below 25 milliseconds.

For telecom Saudi Arabia, this local control is increasingly important as governments and regulated industries move sensitive workloads into the cloud. Huawei's AI-Centric Network also includes network automation, performance assurance, lossless transmission and built-in security.

Technology deployment is being paired with workforce development. Huawei says it works with more than 800 global software vendors, 1,500 local system integrators and 300 delivery partners. Through more than 30 ICT Academies, it trains around 10,000 professionals annually, strengthening the skills base behind ICT Saudi Arabia.

Riyadh Builds Around Both China and the US

The wider LEAP announcements show why Saudi Arabia telecom companies are becoming part of a much larger technology ecosystem. Chinese autonomous-driving company WeRide plans to deploy up to 10,000 robotaxis in Riyadh by 2030, while Saudi PIF-backed HUMAIN has commissioned an Arabic-language AI model from China's MiniMax.

Tencent Cloud has also secured a Saudi operating license for government and financial clients after investing $150 million in the Kingdom. Meanwhile, Lenovo plans to begin mass production of a laptop unveiled at LEAP in Riyadh by the end of 2026, expanding the Saudi Arabia ICT market into local hardware manufacturing.

These developments increase pressure on telecom operators in Saudi Arabia because robotaxis, AI services and cloud platforms all depend on continuous connectivity, secure data movement and computing resources working together.

Yet Riyadh is not moving exclusively toward Beijing. AWS is building $5.3 billion worth of data centers in Saudi Arabia, while access to

"THE GULF IS OF VITAL IMPORTANCE FOR CHINA'S TECH OUTREACH,"

advanced US chips remains critical to the Kingdom's AI ambitions.

The following creates a strategic limit around telecom in Saudi Arabia. To secure US export licenses for advanced chips, HUMAIN will not allow Chinese frontier AI models to be trained on its US-approved computing capacity, although its CEO says Chinese open-source models can still be offered through Saudi data centers.

The balancing strategy was visible in July, when Chinese minister Li Lecheng met Saudi minister Abdullah Alswaha in Beijing to discuss AI, cloud computing, digital infrastructure, talent and subsea cables. No commercial agreement was announced, but the meeting showed where future cooperation could move.

For Saudi Arabia telecom operators, subsea cables are especially important because sovereign AI depends not only on local data centers but also on secure international fiber links. These networks are increasingly strategic as cyber risks and geopolitical tensions grow.

"The Gulf is of vital importance for China's tech outreach," said James Kynge, senior research fellow for China and the world at Chatham House. "It is a really important focal point for China to show the whole world, not just the region, that its tech is often better to buy and to operate than US tech."

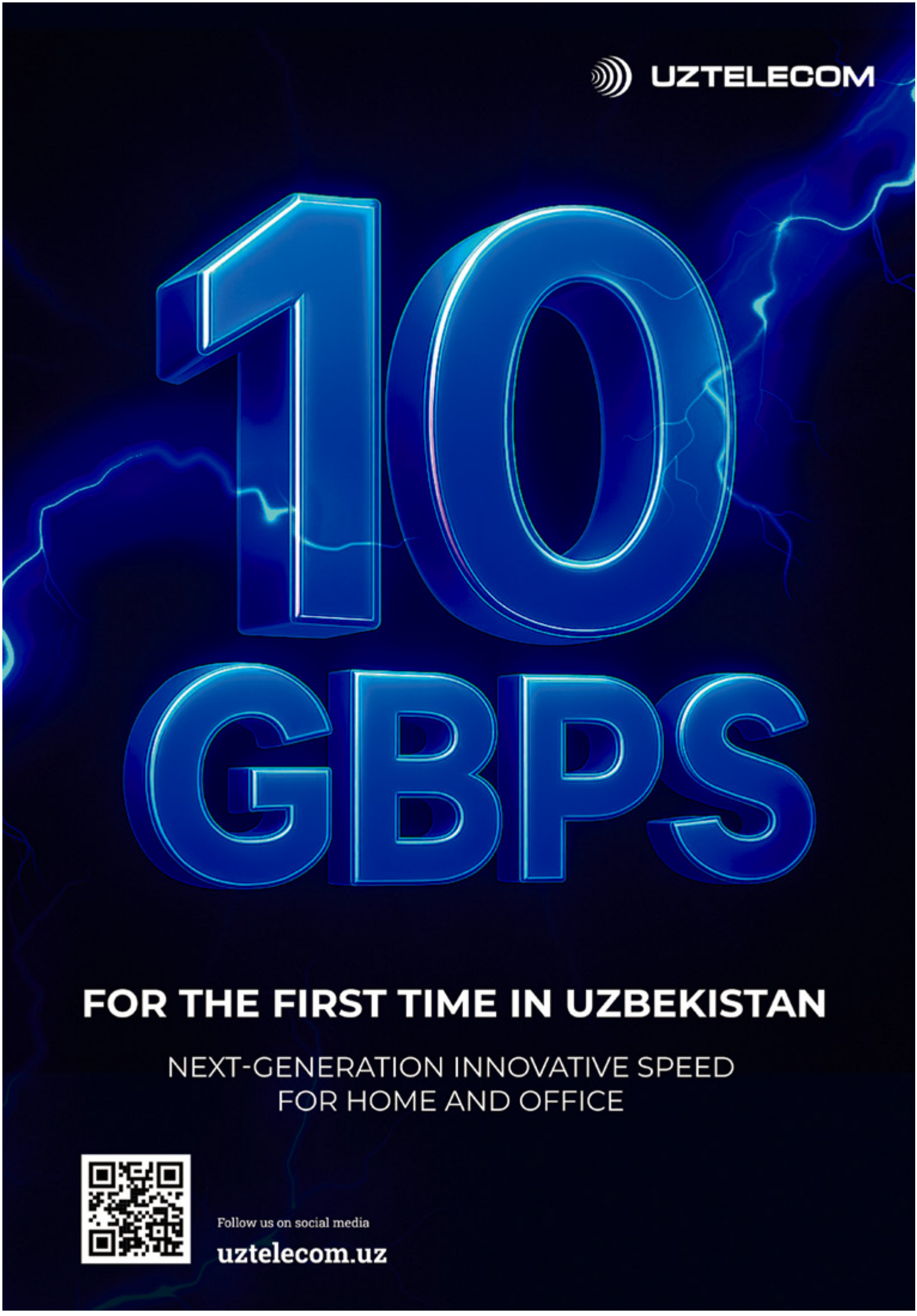
Academic Karim Alwadi described the scale more sharply.

"People don't appreciate how big this is, it's a tsunami," Alwadi said. "Ride the wave."

The real test for Saudi Arabia telecom companies will be whether these investments create lasting domestic capability. Riyadh is effectively using competition between China and the US to build AI compute, sovereign cloud, local manufacturing, connectivity and technical skills on its own terms.

by Natalia El Hajj - September 07, 2026

Source: https://insidetelecom.com/saudi-arabia-telecom-companies-drive-growth/


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UAE Gives Starlink 10-Year License **as Gulf Satellite Push Accelerates**

On September 5, 2026, the UAE granted SpaceX's satellite operator a 10-year license, placing Starlink UAE at the center of Gulf efforts to strengthen digital resilience, expand competition and connect consumers, businesses, government, aviation and maritime users under a national regulatory framework.

The UAE approval follows Bahrain's January 12 license and Kuwait's March 2026 service launch, showing how Starlink UAE fits into a coordinated Gulf shift toward low-Earth-orbit connectivity.

The expansion gives Starlink Middle East a larger commercial presence across countries seeking backup networks for essential sectors.

It also makes satellite internet UAE infrastructure part of a broader regional push beyond traditional fiber and mobile coverage.

UAE Opens Satellite Market Beyond Homes

The UAE's Telecommunications and Digital Government Regulatory Authority (TDRA) granted Starlink a General Space Services Licence, Gulf News reported on September 5, 2026. The 10-year approval allows the SpaceX-owned service to establish, operate and manage a public satellite communications network.

Unlike earlier commercial agreements covering selected aircraft or ships, Starlink UAE can now serve individuals, businesses and government entities directly.



The license also covers aviation and maritime connectivity, creating possible applications across airlines, commercial vessels and offshore platforms.

The approval places Starlink Dubai within a national regulatory structure that could increase competition while adding another connection layer beside fiber-optic and 5G networks. However, satellite broadband is more likely to complement the UAE's developed telecom infrastructure than replace it.

Potential uses for Starlink UAE coverage include emergency communications, business continuity and service delivery in locations where terrestrial networks are disrupted or unsuitable. Energy, logistics and remote operations could also benefit from an independent communications option.

Demand for Starlink in Dubai may be driven by enterprises requiring network redundancy rather than households lacking broadband access.

This makes satellite internet UAE services particularly relevant to critical operations, aviation, shipping and crisis response.

The license does not mean Starlink has secured contracts with these sectors. Still, its 10-year duration gives the operator regulatory certainty to plan investment, distribution and service development.

The arrival of Starlink Dubai also strengthens the UAE's position as a regional base for space-based communications providers.

As commercial activity grows, Starlink UAE could test how satellite networks operate alongside some of the Gulf's most advanced terrestrial systems.

Bahrain and Kuwait Extend Regional Reach

Bahrain's Telecommunications Regulatory Authority Licensed Sama X on January 12, to provide Starlink satellite broadband across the kingdom. The service targets professionals, enterprises and public-sector organizations on land and in national waters.

"Bahrain stands as a beacon of technological progress and innovation within the region, and we are honoured to play a role in advancing this legacy," Sama X chief executive Amit Somani said when the Bahrain license was announced.

The Bahrain decision widened Starlink in Middle East availability while supporting primary and backup internet connections. It also linked satellite broadband with Bahrain's Economic Vision 2030 and its wider digital development goals.

Kuwait's Communications and Information Technology Regulatory Authority (CITRA) granted Starlink its license on March 16,

"STARLINK'S HIGH-SPEED, LOW-LATENCY INTERNET IS NOW AVAILABLE IN KUWAIT!"

after the operator met national technical, telecommunications and spectrum requirements. The regulator said low-Earth-orbit services would introduce high-speed, low-latency connections and provide users with additional choices.

Elon Musk announced the service launch on March 14, stating, "Starlink's high-speed, low-latency internet is now available in Kuwait!"

The Kuwait launch gave Starlink Middle East another market where satellite connectivity can support remote operations and essential services.

It also broadened Starlink Middle East coverage during a period when reliable backup communications have become increasingly important.

For the Gulf, Starlink in Middle East markets are moving beyond closing rural connectivity gaps. Its wider role lies in supporting resilience across aviation, maritime transport, energy facilities and public services.

With the UAE offering a long-term national license, Bahrain enabling local delivery and Kuwait approving public access, Starlink UAE now anchors a wider Gulf satellite strategy built around competition, continuity and connections beyond the reach of ground infrastructure.

by Nour ITS - September 07, 2026

Source: https://insidetelecom.com/starlink-uae-secures-10-year-satellite-internet-license/

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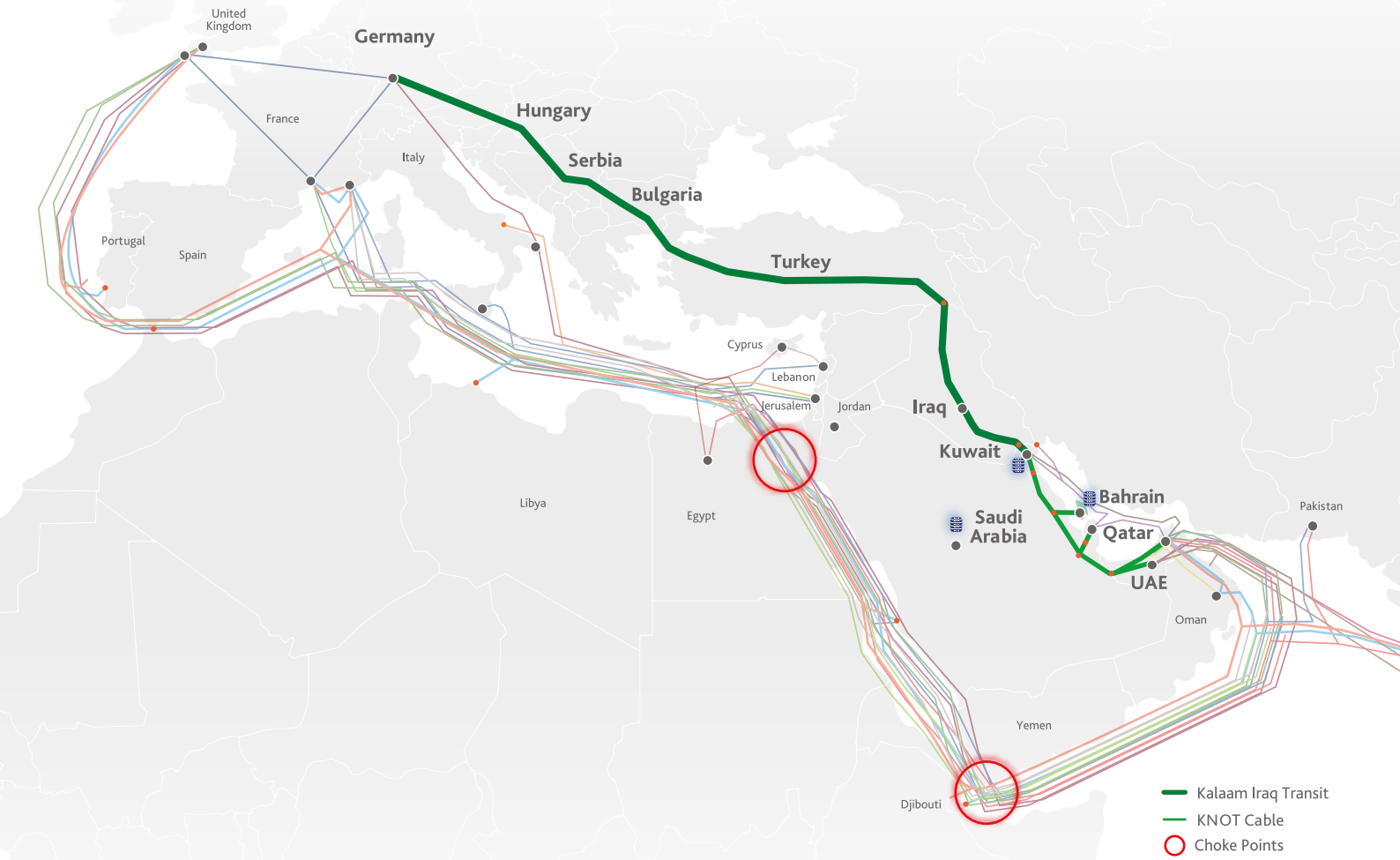
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Dyna.Ai and GAPP partner to power Saudi Arabia's digital infrastructure and next-gen AI workforce

Dyna.Ai, a global AI-as-a-Service provider headquartered in Singapore, and Gulf Applications (GAPP), a Saudi technology integration company, have announced a partnership during LEAP 2026 in Riyadh. The partnership will bring Dyna.Ai's agentic AI platform into the enterprise IT environments GAPP supports across the Kingdom, helping organisations drive measurable business results.

Through the partnership, Dyna.Ai and GAPP will explore opportunities to introduce Dyna.Ai's enterprise agentic platform, including voice and text-based AI agents and AI Employee solutions, to organisations across the Kingdom, based on their specific needs and use cases. Potential applications may include embedding agents into day-to-day operations, from internal workflows to client-facing service delivery, rather than deploying them as standalone tools, while supporting applicable local data-governance requirements.



Ahmed Al Azmah (left) and Carlton Liew celebrate the partnership between Dyna.Ai and GAPP. Image: Dyna.Ai

The announcement comes as Saudi Arabia marks 2026 as the official Year of Artificial Intelligence, an initiative led by the Saudi Data and Artificial Intelligence Authority (SDAIA). The partnership responds to rising demand across public and private sectors for practical AI solutions that align with Vision 2030 digital mandates.

Carlton Liew, the chief business officer and co-founder of Dyna.Ai, said: "GAPP brings strong local market knowledge and enterprise technology expertise, creating a solid foundation for this partnership. Together, we will work with organisations to identify where AI agents can add value and how they can be introduced with minimal disruption, creating a practical, lower-risk path to measurable business results."

Ahmed Al Azmah, the chief operating officer of GAPP, added: "Our collaboration with Dyna.Ai creates opportunities to introduce advanced, enterprise-grade AI capabilities to organisations across the Kingdom. By pairing global AI technology with our deep local integration expertise, we aim to help Saudi organisations automate critical workflows, elevate operational standards, and support the Kingdom's Vision 2030 digital-economy objectives."

The agreement marks Dyna.Ai's latest step in expanding its presence across the Middle East's enterprise technology sector.

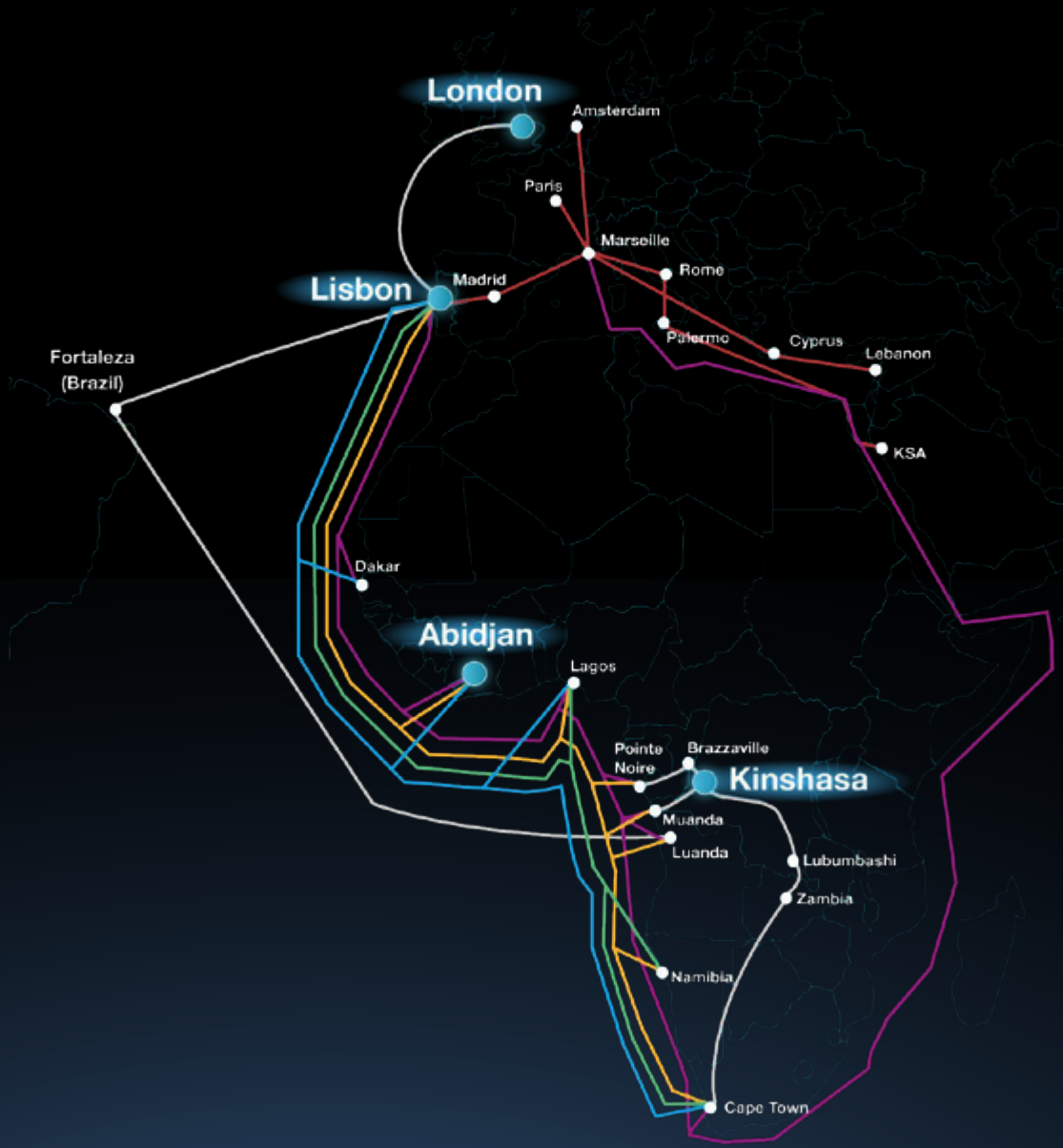
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Source: https://iot-now.com/2026/09/08/158280-dynaai-gapp-partner-saudi-arabia-digital-infrastructure-ai-workforce/

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DJIBOUTI TELECOM

How a small nation is building one of Africa's most ambitious digital infrastructures

A Tiny Nation at the Crossroads of Global Data

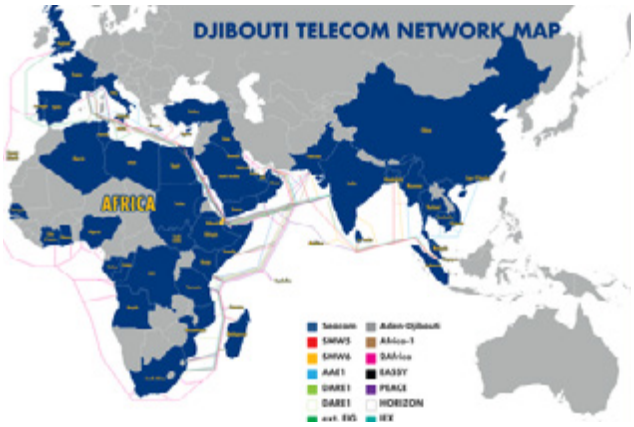
Djibouti counts barely 1.15 million people. Yet on the map of global data, it punches far above its weight — perched between the Red Sea and the Gulf of Aden, on one of the world's most strategic maritime corridors. Over the past 25 years, Djibouti Telecom has turned that geography into digital leverage: from a single submarine cable to a web of twelve, a 133-fold surge in international capacity (from 30 Gbps to 4 Tbps). In East Africa's connectivity story, Djibouti has become the node you cannot ignore. Today, it provides access to more than twelve submarine cable systems moving internet traffic between Europe, Asia and Africa. The roster is a who's who of global connectivity — EASSy, SEACOM, SEA-ME-WE-5, SEA-ME-WE-6, AAE-1, DARE-1, IEX, 2AFRICA, AFRICA-1, ADEN-DJIBOUTI and the upcoming PEACE cable — backed by more than $200 million in investment over the past decade.

With so many routes landing on its shores, Djibouti can keep traffic moving even when the Red Sea becomes a high-risk zone for undersea infrastructure. African Business (April 2025) singled the country out as a rare "stable telecoms anchor" amid rising security pressures along the Suez corridor — an advantage that matters more each time geopolitics tightens its grip on global supply lines, digital ones included.

Project Horizon: Africa Connects Itself

Then came Horizon. On 4 February 2026, in Djibouti City, the CEOs of Djibouti Telecom, Ethiopia's Ethio Telecom and Sudan's Sudatel Telecom Group signed a tripartite agreement for the Horizon Fiber Initiative.

The concept is simple: a 2,800-kilometre fibre corridor running from Djibouti's cable landing stations across Ethiopia and on to Sudan, reaching Port Sudan on the Red Sea. Built for multi-terabit traffic, it is a carrier-grade backbone designed for hyperscalers, cloud providers, enterprises and everyday users.



From Subsea Cables to Everyday Services

Being a transit hub is only half the story. At home, Djibouti Telecom runs a full portfolio of consumer and business services. Its 4G+ network now reaches 96% of the population, The operator carried out its first 5G tests in 2025, with commercial VoLTE and eSIM services planned for 2027. On fixed broadband, the Fibre-to-the-Home rollout is advancing in waves across Djibouti City and the regions, with a goal of 100% national fibre coverage by the end of 2026 — helping position the country as a fibre-first nation.

Djibouti Telecom has also embraced the digital financial revolution. Its Mobile Money platform enables users to send and receive funds, pay bills, top up accounts, and conduct everyday financial transactions entirely from a mobile phone, without the need for a bank account. This service has proven transformative in a country where a significant portion of the population remains unbanked, bringing financial inclusion within reach of thousands of families.

For the country's bustling port economy and internationally mobile population, the operator maintains roaming agreements with more than 300 operators worldwide — ensuring that travellers, maritime crews, and business professionals remain connected wherever their journeys take them. Taken together, these services reflect a strategic vision that goes well beyond cables and bandwidth: Djibouti Telecom is building not just the infrastructure of connectivity, but the digital ecosystem through which Djibouti's economy — and the wider region's — will grow.

The mission of Telegraph42 Management is to provide quality service in all areas of the telecommunications market, as well as to ensure the availability of international communication services for operators and end users.
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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!



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The conclusion is simple. The players who win the next decade of messaging won't be the ones with the cheapest routes. They'll be the ones customers can trust.



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MUSTAFA ASSAF

CEO at TDNT

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A2P is still one of telecom's most valuable channels, but grey routes, SIM farms, fake OTP traffic and smishing are eroding it, and users are learning to distrust messages they should trust. At TDNT, we chose from day one to grow on quality, not volume: a 24/7 NOC, real-time route monitoring, and fraud blocked before it reaches our partners.
AI is now raising the stakes on both sides. It powers smarter attacks, and it's also our best defense. The industry's next step is clear: closer collaboration against fraud, stronger authentication, and transparency as a standard. Trust takes years to build and seconds to lose.

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Being present where the industry meets is part of how we work. In the past year, the TDNT team has met partners at GCCM Madrid, CIS GCCM in Almaty and BATIC in Bali, and now GCCM Middle East in Muscat. We're expanding our presence at carrier and technology events across 2026 and 2027. Every event brings new partners, new routes and new ideas, and we never take those relationships for granted.

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The TDNT team at CIS GCCM, Almaty 2026.

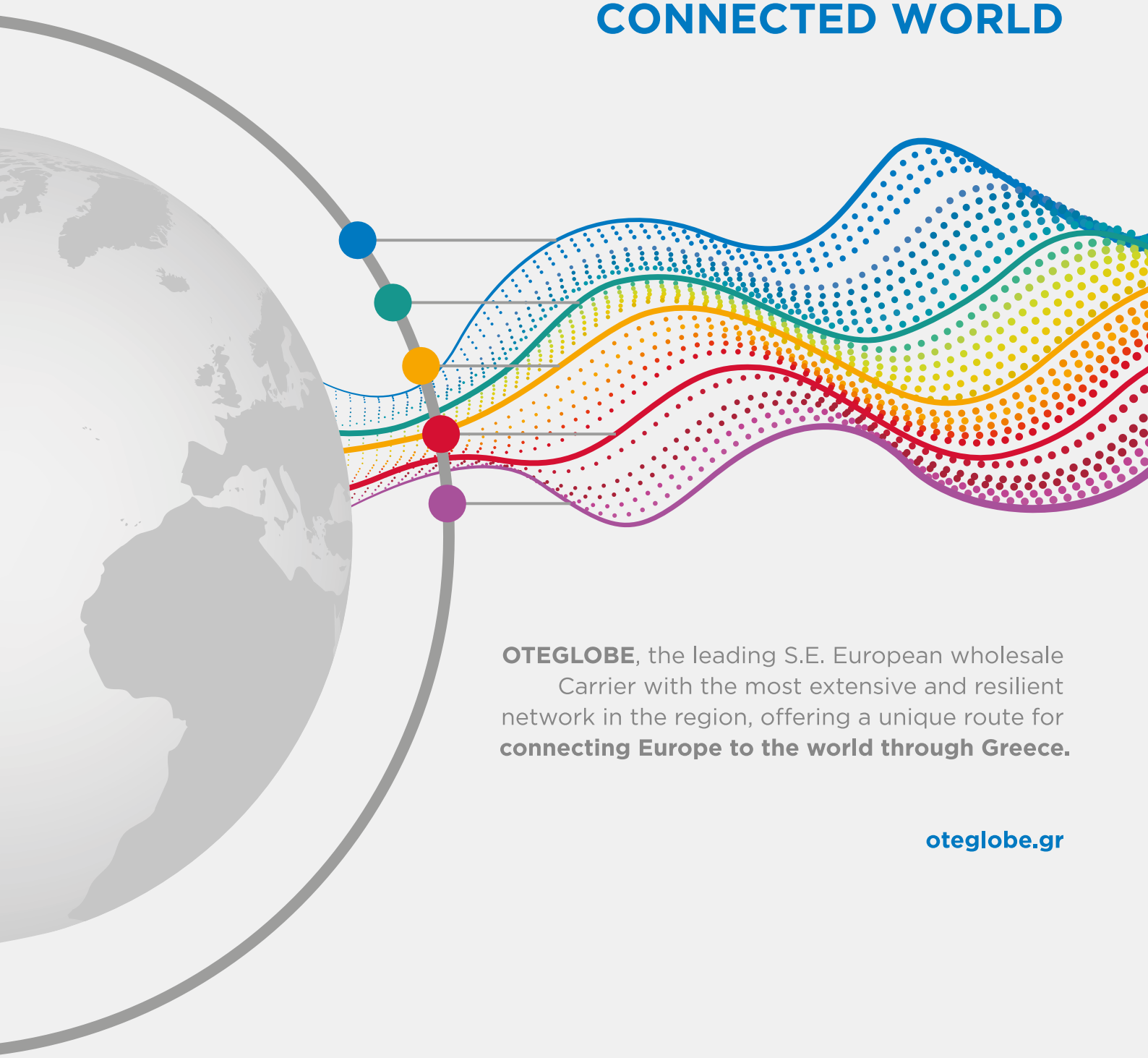


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