



Disruptive Analysis

Don't Assume

Submarine Cables: Future Trends & Challenges

BEREC Workshop, Online, December 2025

dean@disruptive6G.com

@disruptivedean

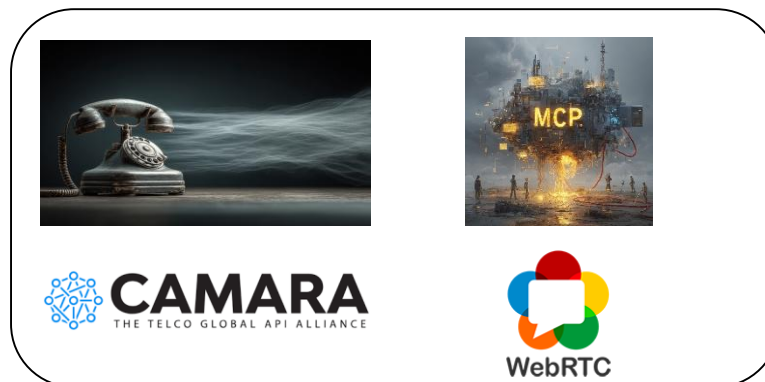
Image credits: Pixabay.com / Midjourney AI / Dean Bubley / Companies as stated

Dean Bublely & Disruptive Analysis

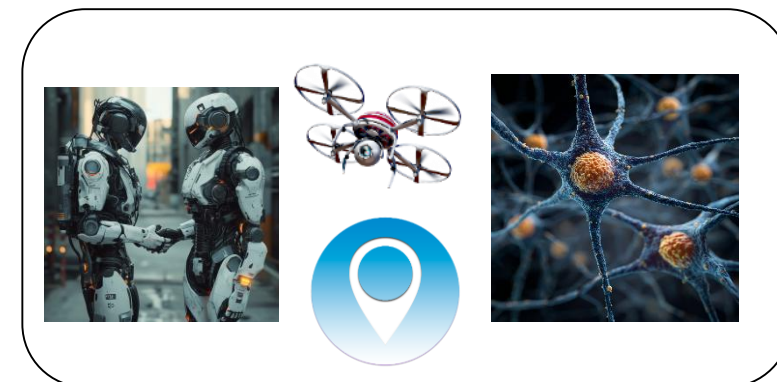
- Tech/telecom analyst & strategic consulting since 1991
- Advisor to telcos, regulators, vendors, investors, government
- Private advisory projects, workshops & public speaking
- Futurism, Forecasting, Anti-Forecasting, Policy, “Unthinkable”



**Network Tech, Policy
& Business Models**



**Communications
Apps, APIs & Services**



Telecom-Futurism



Subsea in context: broad trends in networks & cloud



AI everywhere: What does it mean for networks?



The wider network: Beyond subsea to wireless, satellite & last-mile access



Wildcards & “unthinkables”. Tech, regulation & (geo)politics

Plus numerous other adjacent trends: new entrants in networks, quantum, 6G, cybersecurity etc

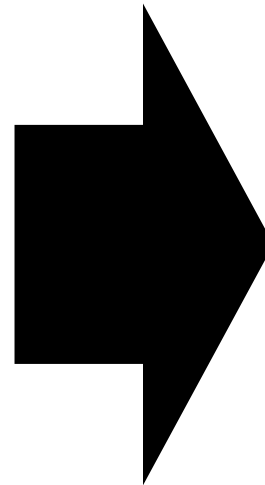
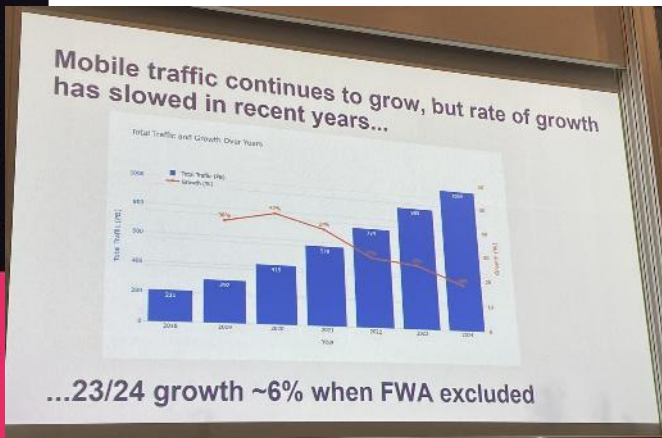


Sustained shift from access network to core / transport

William Webb



The End of
Telecoms History



AI traffic is not showing up in access network traffic growth yet, unlike data between & inside datacentres. Important for regulators & policymakers to address



AI compute (& connectivity) is constrained by power



The New York Times

Hungry for Energy, Amazon, Google and Microsoft Turn to Nuclear Power

Large technology companies are investing billions of dollars in nuclear energy as an emissions-free source of electricity for artificial intelligence and other businesses.

- Datacentres go to where the power is
- Connectivity (inc subsea) will follow the energy
- Implications for landing station sites
- Requirements for integrated policy for “AI Corridors” of fibre/subsea + DCs + power
- Island populations will need “AI inclusion” focus



New ways AI impacts subsea networks & telecoms

AI enablers

Cable route planning

SMART & route planning

Agentic NetOps via automation

AI location

Proximity to power sources

Cloud / edge AI opportunities

Sovereignty (inc sub-national)

AI traffic

East-West inter-cloud flows

AI training & model update

AI-RAN & 6G control

Additional AI roles

AI as disruptor: semantic compression

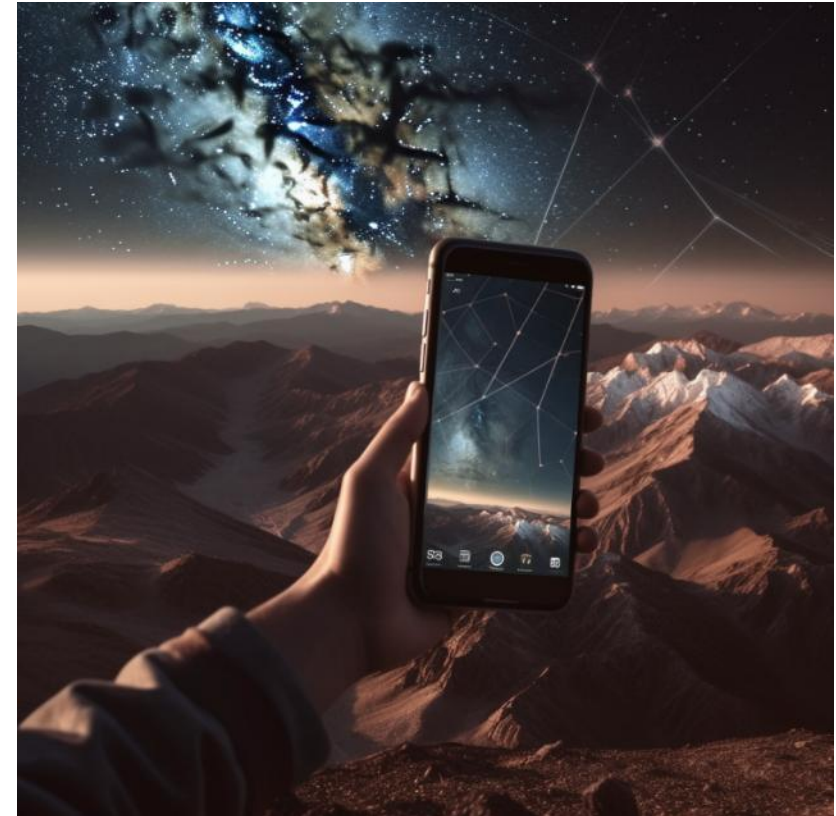
AI as regulator: automated compliance

AI in optical



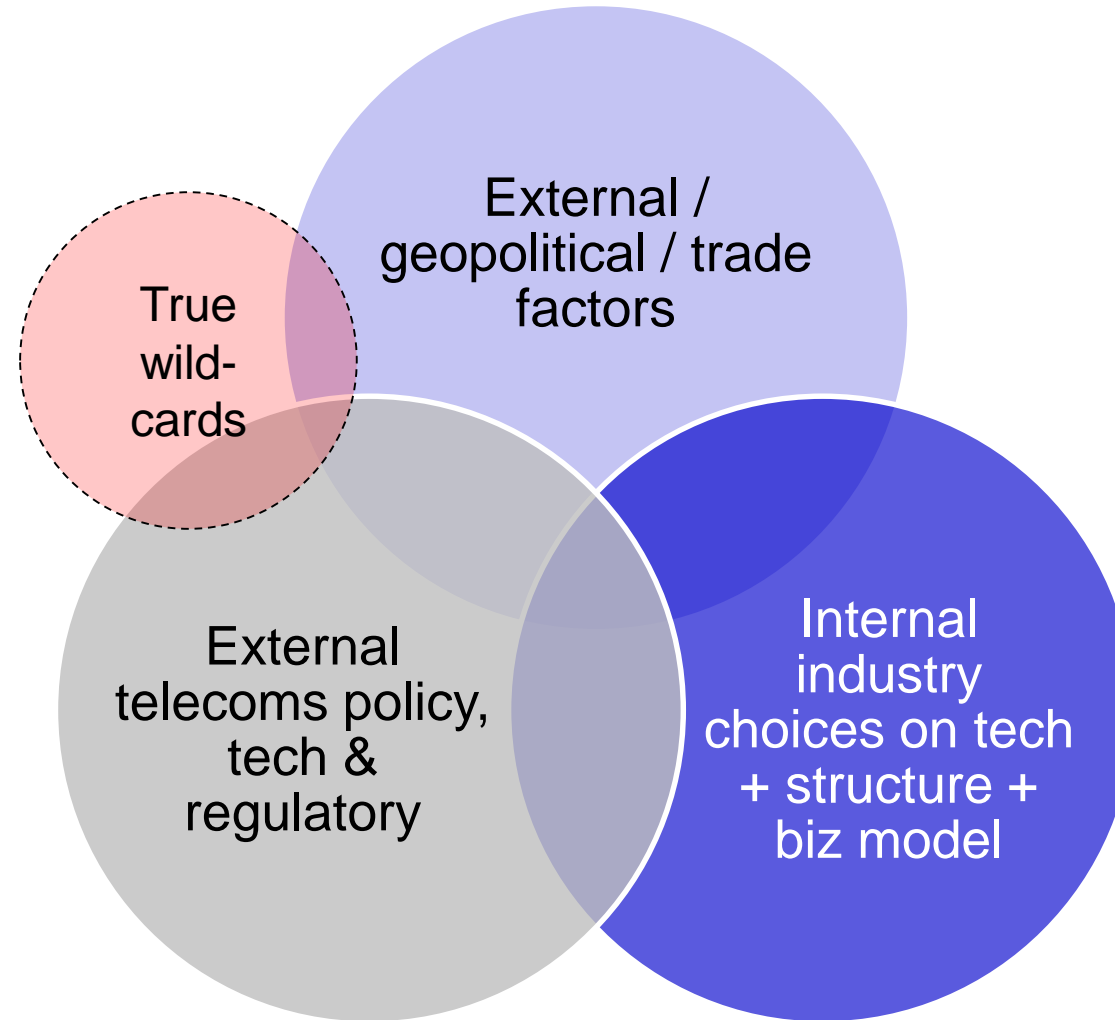
The paradox of satellite: revolutionary yet still overhyped

- Huge promise, but also hype
- Transport, last-mile broadband, D2D
- Addition / backup for subsea (esp. islands)
- Starlink – how far can it scale?
- Disruptors? AST, Amazon Leo, OneWeb etc?
- European sovereign satellite networks
- D2D supported in more phones & IoT
- Fundamental capacity limits
- Regulatory landscape still evolving
- B2B & cloud integration





Unthinkable interdependencies: 3 sets of forces (+1)





Follow me for more on LinkedIn & Substack & YouTube



Dean Bublely

Tech Industry Analyst & Futurist | Influential advisor
& speaker with 25yrs+ in Telecoms Strategy, 5G /...

