

SCENARIO 1: THE GREAT DIVIDE

One morning in July of 2038, the world witnessed a moment that would forever change the course of global connectivity. One country called for immediate restriction of data flow through all undersea cables that connect both directly or indirectly to two other countries. The decision was spurred by the discovery of a major espionage operation mediated via undersea cable landing stations, which sent shock waves across governments and industry alike. By 2045, this discovery led to the creation of separate and isolated information spheres, or connectivity 'blocs'. The global internet as the world had known it is dead.

TURNING POINT

2038 – "Cable Conflict".

TECHNOLOGY BREAKTHROUGH

Industrial-scale quantum computing technology.

CONNECTIVITY PROFILE

- Fractured network, with each country in one of three major blocs
- Dominant, state-based control over connectivity and data flow
- Regional instability
- Onerous regulatory environment

Turning Point: 'Cable Conflict' of 2038

Governments were initially baffled at the drastic action by one country to immediately restrict data flows through all undersea cables that connected both directly or indirectly to two other countries. This set off a cascade of frantic calls and negotiations as leaders sought to understand the full impact on international connectivity.

Investigations uncovered an espionage operation powered by a new breakthrough technology – an industrial-scale quantum computer. The discovery raised alarms as countries throughout the region began considering the implications. Serious questions were asked about potential foreign interference in recent national events, including elections. Accusations were made on all sides due to the lack of information available, while tensions and fears continued to rise. The dramatic shift in international connectivity caused by the unilateral restrictions on dataflows led to multi-national businesses and financial institutions reprioritising their regional presences. The 2038 cable conflict led to the formation of three 'blocs' of countries across the region, each led by a major power.

'What do I think? It's a nightmare!

Now, my business can't operate in over half of the countries in the region because of these different connectivity blocs. Half the countries, half the business, half the income! I've been in this business a long time and there's always been new regulations and laws to navigate, but unless I want to operate multiple companies in multiple different blocs using different IT systems, software, privacy and security requirements, and a ton of other things, too, I can only sell within our bloc. Our profit has plummeted, and I'm barely hanging on – I'm worried that I'll go under in a few years.'

Exporter, 56, based in Australia, giving up on working across blocs

The World in 2045: A Digitally Divided Indo-Pacific

By 2045, international cooperation has plummeted with the region fractured into three isolated information blocs. Small and medium countries were forced to choose their alignment to one of the three blocs.

Within some connectivity blocs, quantum cables with superior security and bandwidth are now standard and offer near-zero latency, increased resilience, and enhanced protection against natural disasters and cyberattacks. Satellite networks offer a secure connection for limited and restricted traffic between blocs.

However, countries outside the quantum-enabled zones have fewer new cables being installed and, in some cases, installation and maintenance has slowed almost to a complete stop. Many citizens are becoming frustrated by connection issues, increasing migration to more connected countries. This communication divide and limited information-sharing between the blocs is causing significant instability within the region, splintering economies, heightening geopolitical tensions, and making it harder to coordinate responses to international crises. Societal unrest is mounting due to highly restricted connections between blocs making it difficult for citizens to communicate between friends and family in the other blocs. Meanwhile, the digital economy is thriving between connected countries, but almost non-existent between blocs.

Harsh data localisation laws are now widespread, leading over-the-top (OTT) providers to be highly selective about where they build data centres, favouring countries with larger markets. In countries where cable services have become limited, governments have incentivised satellite network coverage, building the local network and growing their domestic economy.

All governments across the Indo-Pacific now classify undersea cable infrastructure as critical infrastructure, wielding direct sovereign control and heavy regulation of undersea cable networks. The need to protect national critical infrastructure means new cables are predominantly funded by national defence budgets and government-led investments. Regulations that govern cable protection mechanisms continue to be strengthened all around the region, leading to increasingly onerous permitting requirements for installation, repair, and maintenance of cable infrastructure.

The stricter regulatory environment reflects the heightened focus on security including in response to increased maritime activity in areas such as the South China Sea. It is now standard practice for governments to withhold information about the locations of cable assets, causing a rise in accidental damage.

Responding to sky-high expectations for uninterrupted connectivity within quantum-enabled blocs, cable operators have installed new undersea dark cables to increase redundancies and to be activated to provide a back-up when network outages occur from intra-bloc cable damage – further exacerbating the digital divide which, in turn, is entrenching economic, social, and security divides between blocs.

'It's strange—on one hand, we've never had better internet.

In my classroom, everything's online: instant translations, real-time simulations, AI-assisted tutoring. The students love it, and I can do so much more than I could even five years ago. Within our bloc, the connectivity is amazing – fast, stable, secure. But outside? It's a different story. My sister lives just across the border in another bloc, and we can barely stay in touch. Our calls drop constantly, messages don't get through, and half the apps we used to use are restricted now. It's hard to explain to the kids how we're living in this hyper-connected world, yet I can't even reliably talk to my own family. That part hurts. The tech is incredible – but the divisions feel deeper than ever.'

Teacher, 43, thriving at work but cut off from family across blocs

