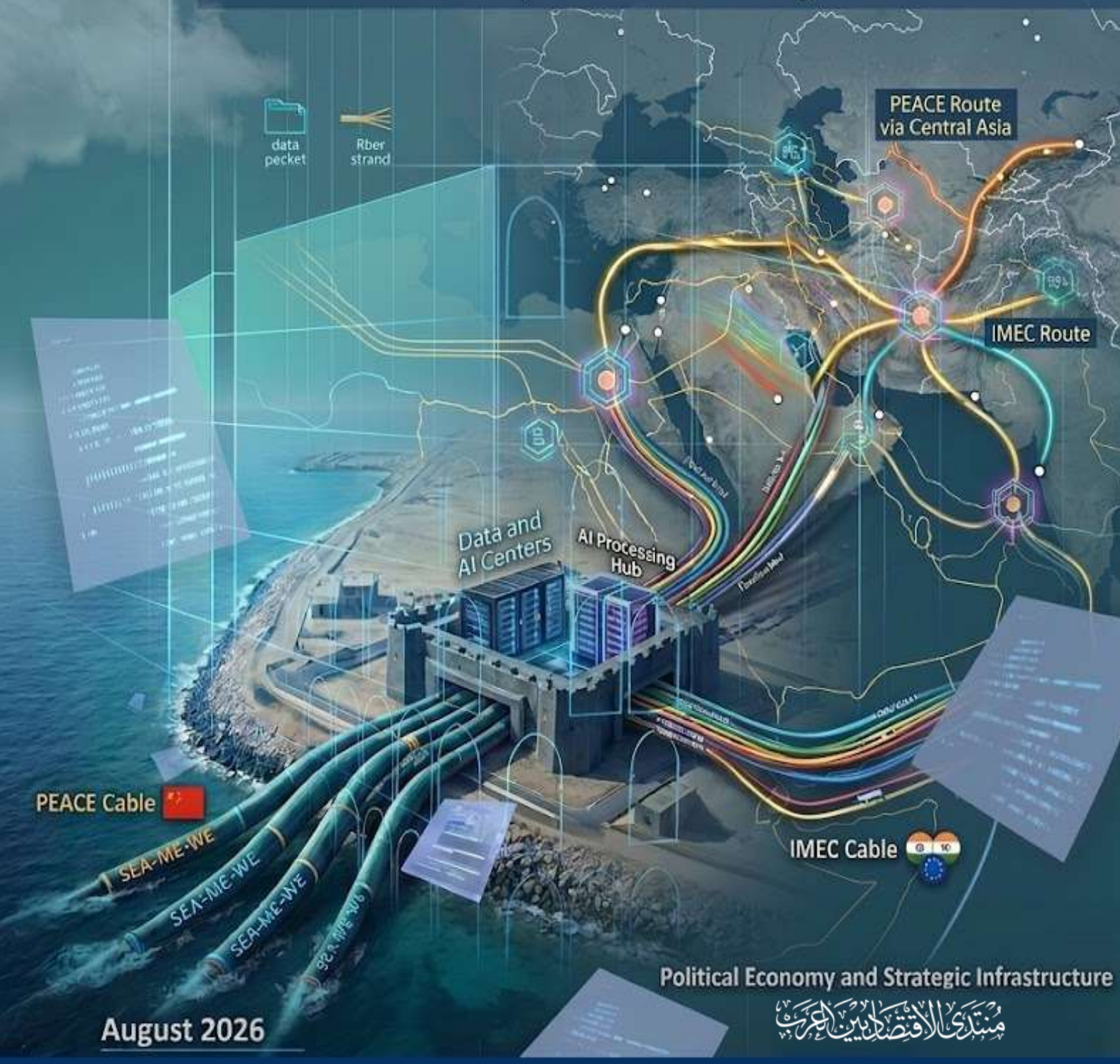
منتدى الاقتصاديين العرب

CONTESTED CORRIDORS

Submarine Cables, Terrestrial Fiber and the Political Economy of Asia to Europe Data Flows through the Middle East.



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Contested Corridors

Submarine Cables, Terrestrial Fiber and the Political Economy of Asia to Europe Data Flows through the Middle East

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Abstract

Ninety-nine per cent of intercontinental internet traffic moves through submarine cables, and between twenty and thirty per cent of it crosses the Middle East. **This paper asks why, within a period of thirty-six months, at least six competing corridor projects have been announced to carry that traffic between Asia and Europe, and what the competition implies for the states that host it?** It treats the cable network as a topology of political power rather than as a telecommunications asset, and applies four analytical instruments to it: the **theory of weaponized interdependence,** which locates coercive capacity at network chokepoints; the **theory of locational rent**, which explains why transit geography generates income and why that income invites competitive entry; the **theory of asset specificity**, which explains why a twenty-five year sunk cable locks in a political alignment; and the literature on **hedging and omni-alignment in small and middle power foreign policy**. Drawing on a structured focused comparison of eight cases, namely the United Arab Emirates, Saudi Arabia, Israel, Türkiye, Egypt, Iraq, Syria and Oman, the paper advances three findings. First, **route selection in this corridor competition is determined by political admissibility, in particular on the Palestinian question, rather than by engineering cost or latency**, and the fiber route has consequently become a mechanism for expressing alignment on the Palestinian question. Second, the **projected demand from Gulf artificial intelligence compute converts route redundancy from a resilience option into a capacity requirement**, with incremental Asia to Europe transit demand of between 80 and 1000 terabits per second (Tbps) by 2030 against an installed base of 500 to 600. Third, the **rent position of Egypt, which is the only mandatory node in the present system**, is simultaneously the source of its fiscal leverage and the principal cause of the bypass investment now under way. The paper closes with three scenarios for 2030 and a set of policy implications for host states, investors and multilateral bodies.

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Keywords: submarine cables; weaponized interdependence; corridor rent; chokepoints; India-Middle East-Europe Economic Corridor; Digital Silk Road; artificial intelligence infrastructure; Gulf political economy; Middle East

JEL classification: F52, F55, H54, L96, O25

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Contents

1. Introduction: the corridor scramble and its causes

In February 2026 the Saudi state operator STC Group won the concession for SilkLink, an 800 million dollar program to lay 4,500 kilometers of terrestrial fiber across Syria, to build data centers along it, and to construct a submarine cable landing station at Tartus. Ten days later a consortium of Emirati and Iraqi investors announced WorldLink, a 700 million dollar cable running from Fujairah across the Gulf to the Faw Peninsula and then overland to the Turkish border with a design capacity of 900 terabits per second (Tbps). On 9 June 2026 Türkiye and Saudi Arabia signed a memorandum in Riyadh covering the revival of the Hejaz railway corridor and a parallel terrestrial fiber route along the same geography, with a feasibility study due at the end of the year. Three months earlier the President of Lebanon had formally requested the inclusion of Beirut and Tripoli in the India-Middle East-Europe Economic Corridor (IMEC). Taken together with the corridor announced at the New Delhi G20 in 2023 and the Chinese Belt and Road (BRI) routes already operating through Central Asia and Pakistan, at least six competing overland corridors between Asia and Europe were placed on the table within thirty-six months, and more than twelve billion dollars of new cable projects were announced in the first months of 2026 alone.

This concentration of announcements requires explanation. The engineering problem it purports to solve is not new. Cables have crossed Egypt since the nineteenth century, and the Suez crossing has carried the great majority of Europe to Asia telecommunications traffic for the whole of the fiber-optic era. What changed was not the technology, but the risk premium attached to a single route and the value of the traffic that route carries. In February 2024 four cables were damaged in the Red Sea, and by the estimate reproduced in the industry press the incident disrupted the equivalent of 70% of Asia to Europe and Middle East traffic. In September 2025 further cables were severed near Jeddah. The Houthi campaign in the Bab al-Mandab has continued. At the same time, the announcement of gigawatt-scale

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artificial intelligence compute campuses in the Gulf created, for the first time, a credible prospect that the Middle East would become a producer and consumer of intercontinental data traffic rather than merely a place through which it passes.

The argument of this paper proceeds from a single observation: the Middle East is in the process of repeating, in the domain of data, the transit economy it built around hydrocarbons and goods, and it is doing so with the same three structural features. There is a mandatory node that collects rent, which was once the Suez Canal and the pipeline terminals and is now the Egyptian terrestrial crossing. There are competitors seeking to build around that node, which were once the trans-Arabian and Iraqi pipelines and are now SilkLink, WorldLink and the IMEC land route. And there is an external great power competition, once between the Atlantic powers and the Soviet Union and now between the United States and China, that determines which of the competing routes obtains capital, technology and political cover.

Three theses follow, and the body of the paper defends each in turn.

1. **Route selection in this competition is determined by political admissibility rather than by engineering cost, latency or capital efficiency**. The shortest and cheapest path from the Gulf to the Mediterranean runs through Jordan and Israel. That path has been suspended not because it is technically inferior but because Saudi normalization with Israel collapsed after October 2023. The longer, more expensive and institutionally riskier paths through Syria and Iraq are being financed instead. In a sector where cost per bit and latency are conventionally decisive, this is an anomaly that only a political explanation can account for.
2. **The projected demand from Gulf artificial intelligence compute converts route redundancy from a resilience option into a capacity requirement.** Approximately 330 Tbps currently transit Egypt against an installed corridor capacity of the order of 500 to 600 Tbps, with utilization running at 30 to 50% on newer systems. On the central scenario developed in section 7, incremental artificial intelligence traffic adds 300 to 500 Tbps by 2030. The corridors now under construction are therefore necessary rather than redundant, and on the aggressive scenario they are already insufficient.
3. **The rent position of Egypt is simultaneously the source of its fiscal leverage and the principal cause of the bypass investment that threatens it.** Telecom Egypt operates the only commercial crossing between the Red Sea and the Mediterranean and prices it accordingly. Every Gulf corridor project announced since 2025 has cited transit fee reduction among its commercial justifications. The monopoly rent is thus endogenous to the competitive entry that erodes it, and Egypt cannot reform its pricing without surrendering a material foreign currency earner at a moment of acute external constraint.

The paper is organized as follows. Section 2 sets out the analytical framework and derives testable propositions. Section 3 describes the evidence base and its limitations, which are considerable and are stated openly. Section 4 documents the physical layer, that is, the cables that exist, the cables that are announced and the terrestrial routes that compete with them. Section 5 contrasts the two corridor doctrines, the Chinese Digital Silk Road and the Indian combination of private capital and the IMEC framework. Section 6 analyses structural vulnerabilities common to both. Section 7 quantifies the artificial intelligence demand shock. Section 8 examines the thermal, electrical and hydrological constraints that may cap it. Section 9 presents the structured comparison of eight national strategies,

which is the empirical core of the paper. Section 10 identifies four rivalries that determine outcomes. Section 11 offers three scenarios for 2030 with subjective probabilities. Section 12 concludes.

2. Analytical framework: five propositions on infrastructure and power

Submarine and terrestrial cables are conventionally studied by economists as natural monopoly infrastructure and by engineers as a capacity problem. Neither treatment explains the pattern documented in this paper. A framework is required that accounts for the political value of a network position, for the income that accrues to a location, and for the durability of the commitments that cable construction creates. Five propositions are set out below, drawn from four bodies of theory, and each generates an expectation that the empirical sections test.

2.1 Network topology and weaponized interdependence

The first instrument is the theory of **weaponized interdependence** developed by Farrell and Newman, which holds that economic networks with asymmetric topology confer coercive capacity on the states with jurisdiction over their central nodes. Two effects are distinguished. The panopticon effect is the capacity to observe flows passing through a node. The chokepoint effect is the capacity to interrupt them. Both require that the network be centralized, that is, that a small number of nodes carry a disproportionate share of traffic, and that a state possesses jurisdiction over those nodes.

The Asia to Europe data network satisfies both conditions with unusual clarity. 99% of intercontinental traffic moves through submarine cables. 20 to 30% of global traffic and approximately 90% of Europe to Asia and Europe to Africa traffic crosses Egyptian territory. The Egyptian crossing is operated by a single state-owned firm. This is a textbook chokepoint, and its existence explains both the rent that Egypt extracts and the intensity of the effort to build around it.

The framework also clarifies what is at stake in the ownership question. Landing rights, cable ownership and equipment supply are three distinct forms of network position, and they generate different capacities. Ownership of a stake in a consortium confers commercial and, in some readings, observational access. Supply of the repeaters and terminal equipment confers a claim on standards and a potential technical dependency. Control of the landing station and the terrestrial crossing confers the capacity to interrupt. The thirteen cables in the Middle East and North Africa region that are owned, built or upgraded by Chinese entities are therefore not equivalent to one another in strategic significance, and the analysis in section 5 distinguishes among them.

Proposition 1. States will invest in corridor construction in proportion to the perceived coercive exposure created by their present network position, and independently of whether that exposure has been exercised.

2.2 Locational rent and its erosion

The second instrument is the theory of **differential rent applied to geography**. A location that is mandatory for a flow captures an income that reflects not the cost of the service it provides but the cost that users would incur to avoid it. This is the classical structure of the transit rent, and it is the structure that has governed Egyptian public finance since the opening of the Suez Canal. The corridor rent is a

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pure scarcity rent: it is invariant to the productivity of the transit state and is destroyed by the appearance of a substitute.

Two implications follow, and both are visible in the evidence. First, the rent-collecting state has an incentive to price at the level just below the cost of the cheapest available bypass. Second, and critically, the act of pricing at that level creates the very investment that produces the bypass. Telecom Egypt has raised prices to a level that operators describe as exorbitant. The bypass corridors now under construction cite pricing as their commercial justification. This is not a failure of Egyptian policy but a structural feature of monopoly rent, and it is aggravated in the Egyptian case by the fact that the rent-collecting entity is state-owned and its receipts are a material contribution to the budget of a country facing severe foreign currency shortage. Its Israeli neighbor has always sought to capture a share of this revenue stream through alternative routes—a key factor underlying the question of Gaza's future.

Proposition 2. The intensity of bypass investment will be a rising function of the incumbent transit rent, and the incumbent will be unable to reduce that rent because it is fiscally committed to it.

2.3 Asset specificity and political lock-in

The third instrument is **the concept of asset specificity from transaction cost economics**. A submarine cable is among the most specific assets in the industrial economy. It has a design life of approximately twenty-five years, it cannot be redeployed to another route, its salvage value is negligible, and its economic value depends entirely on the continued cooperation of every jurisdiction whose waters or territory it crosses. Terrestrial fiber laid across Syria or Iraq shares these properties and adds a further one, which is exposure to the physical security of a contested territory.

The consequence is a strong form of political lock-in. A consortium that selects a route is not making a commercial choice with a short reversal horizon; it is making a twenty-five year bet on a specific political configuration. This explains an otherwise puzzling feature of the evidence, which is the length of time that projects remain formally alive after the political conditions that justified them have disappeared. It also explains why the IMEC cable has no consortium. Where the political configuration is genuinely uncertain, the rational response of private capital is not to choose the wrong route but to decline to choose at all, and to route instead over existing systems. The IMEC digital pillar is at present using SEA-ME-WE 6 and Blue Raman rather than constructing a dedicated system, which is the observable signature of precisely this behavior.

Proposition 3. Where political uncertainty over a route is high, private capital will defer construction and route over existing capacity, and the corridor will exist as a framework document without a physical asset.

2.4 Institutional form: bilateral contracting against multilateral memorandum

The fourth instrument concerns institutional design. The two corridor doctrines examined in this paper differ less in their engineering than in their contracting form. The Chinese Digital Silk Road proceeds through bilateral agreements between a state-owned or state-financed Chinese entity and a host government, backed by concessionary lending from the China Development Bank and the Export-Import Bank of China, with a domestic supplier attached. The India-Middle East-Europe Economic Corridor proceeds through a multilateral memorandum of understanding signed at the 2023 G20 by

India, the United States, the European Union, France, Germany, Italy, Saudi Arabia and the United Arab Emirates, where Israel does not appear while it is a terminal point.

The institutional economics of this difference is straightforward. The bilateral contracting model resolves collective action problems by eliminating the collectivity: there is one lender, one supplier and one host, and the transaction closes. The multilateral model distributes political legitimacy across eight signatories (and Israel) but provides no mechanism for aggregating their commitments into a financing decision. As of mid-2026 IMEC has no permanent secretariat, no treaty basis, and no coordinating body empowered to allocate cost among its members. The Atlantic Council has identified this institutional vacuum as a critical gap. The distinction is not that one model is superior in the abstract but that they fail differently: the bilateral model fails through host state debt distress and external sanction, and the multilateral model fails through non-decision.

Proposition 4. Corridor projects organized as multilateral memoranda without a secretariat will exhibit systematically longer intervals between announcement and construction than corridor projects organized as bilateral contracts with attached financing.

2.5 Hedging and the market for alignment

The fifth instrument is drawn from the literature on hedging and omni-alignment in the foreign policy of small and middle powers. Hedging is understood here not as indecision but as the deliberate purchase of insurance against the failure of any single alignment, pursued by states whose location gives them something that several patrons want. It generates a characteristic behavioral signature: simultaneous participation in mutually incompatible frameworks, refusal to sign exclusivity clauses, and the cultivation of a reputation for neutrality as a marketable asset.

The Middle Eastern cable landscape is a near-laboratory demonstration. Egypt hosts cables from every party and charges each the same crossing fee while declining to join IMEC, the BRI or any other corridor framework. Oman maintains diplomatic relations with Iran, has hosted United States and Iranian back-channel discussions, takes no position in the Emirati and Saudi rivalry, and is neither in IMEC nor aligned with the BRI. In consequence Oman is the single Gulf jurisdiction acceptable simultaneously to China, the United States, India, Saudi Arabia and Iran, which is precisely why its cable landing count is the highest in the Gulf Cooperation Council. Neutrality is here a productive asset with a measurable return.

The framework also predicts the limit of the strategy. Hedging is profitable while the great powers tolerate ambiguity, and becomes costly when they demand exclusivity. The systematic exclusion of HMN Technologies from Western-aligned consortia, achieved through a combination of incentives and sanction threats, is the mechanism by which that tolerance is being withdrawn. The space in which Middle Eastern states can host both Chinese and Western infrastructure is narrowing, and the analysis in section 10 treats this narrowing as the central medium-term risk to the hedging equilibrium.

Proposition 5. States with credible neutrality will attract a disproportionate share of cable landings relative to the size of their domestic market, and this advantage will decline as great power demands for exclusivity increase.

3. Method, evidence and limitations

3.1 Research design

The paper uses a structured focused comparison across eight national cases. The comparison is structured in that an identical set of analytical questions is put to each case, and focused on that the questions are restricted to the aspects of each case relevant to the corridor problem. The questions are: What is the state's principal corridor project and its stated capacity and cost? What network position does it occupy, meaning whether it is an origin, a mandatory transit node, a contestable transit node or a terminus? What is its alignment with respect to the two corridor doctrines? What physical, institutional or security constraint binds it? And what would have to change for its position to improve materially.

The eight cases are the United Arab Emirates, Saudi Arabia, Israel, Türkiye, Egypt, Iraq, Syria and Oman. The selection is not a sample but the population of Middle Eastern states with an announced or operating corridor asset on the Asia to Europe axis as of July 2026. Jordan appears throughout the analysis as a transit segment rather than as a case, because its corridor role is at present derivative of decisions taken in Riyadh, Haifa and Cairo. Iran is treated as an exogenous risk parameter rather than as a case, since its corridor participation is confined to the Chinese southern land route and its principal effect on the system operates through the Strait of Hormuz.

3.2 Evidence base

The evidence consists of five classes of material, and the reliability of each differs. The first class is operator and consortium disclosure, which includes cable systems, routes, design capacities, ownership structures and dates of commercial service. The second is sovereign announcement, which includes the SilkLink and WorldLink concessions, the national data center strategies, and the intergovernmental memoranda. The third is industry analysis, principally from Analysys Mason, S&P Global and the specialist data center press. The fourth is think tank assessment, principally from the Atlantic Council, the Center for Strategic and International Studies (CSIS), the Middle East Institute and the Institute for National Security Studies. The fifth is contemporaneous press reporting on the Red Sea incidents, the Haifa port strike and the Syrian concession award. The cut-off date for all material is July 2026.

3.3 Limitations, stated openly

Four limitations are material and are stated rather than concealed, since the reader's assessment of every quantitative claim in this paper depends on them.

- **Announced capacity is not installed capacity, and installed capacity is not lit capacity**. A cable described as carrying 200 Tbps is describing a maximum design across all fiber pairs, of which only a fraction is typically equipped at the point of commercial service. Utilization of newer systems in this corridor is reported at 30 to 50%. Where a figure in this paper is an announcement rather than a measurement, it is identified as such, and figures carried in the source material with an explicit interrogation, notably the 400 Tbps attributed to a future IMEC cable and the 100 Tbps attributed to the Europe-Middle East-Asia system, should be read as aspirations.
- **The primary figures are self-reported by parties with an interest in them**. Operators announce capacity to attract consortium members. Governments announce investment to attract further

investment. The 700 million dollar cost of WorldLink and the 800 million dollar cost of SilkLink are announcement figures for projects that in the first case has no named construction contractor and in the second has an eighteen to twenty-four month construction timeline that is optimistic given ground conditions in Syria.

- **The source material contains internal inconsistencies that could not be resolved and are therefore reported as ranges or as discrepancies**. The Red Sea cable damage incident is dated February 2024 in one account and March 2024 in another, and the resulting disruption is variously given as 70% of Asia to Europe and Middle East traffic and as 25% of Asia to Europe and Africa traffic. The design capacity of SEA-ME-WE 6 appears as both 126 and 132 Tbps. The Türk Telekom fiber network is given as 496,000 kilometers in one figure and as more than 605,000 kilometers in another. Egypt's share of global traffic appears as 17% while its share of Europe to Asia traffic appears as 90%, which are compatible statements about different denominators but are frequently conflated.
- **There is no reliable public price series for transit across the Egyptian crossing, for cable landing rights in the Gulf, or for terrestrial capacity on the announced corridors**. The rent argument in this paper is therefore developed on the basis of quantities, revenues and reported operator behavior rather than on prices, and its quantitative precision is correspondingly limited.

A final and more general caution applies. The subject of this paper is moving faster than the publication cycle of literature that would ordinarily discipline it. Between the announcement of SilkLink in February 2026 and the completion of this text in July 2026, the Türkiye and Saudi memorandum was signed, the Lebanese request for IMEC inclusion was lodged, and Israeli and Iranian hostilities escalated. Any of these developments could invalidate a specific claim below. The framework in section 2 is offered partly for that reason: propositions survive the obsolescence of the facts that first suggested them, and the reader who finds a datum superseded is invited to test whether the proposition still holds.

4. The physical layer: what actually exists between Asia and Europe

Any political analysis of corridors that does not begin with the installed base risks mistaking press releases for infrastructure. This section documents what carries traffic today, what is under construction, and what exists only as a route drawn on a map. The distinction matters because the political weight of a corridor is a function of its stage: an operating cable creates a constituency of paying customers and a repair obligation, a cable under construction creates a contractual commitment that is expensive to abandon, and an announced route creates only an option.

4.1 The installed submarine base

Seven cable systems carry the substantial part of Asia to Europe traffic across the Middle East, and an eighth is under construction. Their characteristics are set out in Table 1. Three features of the table deserve emphasis before the detail is examined.

First, **the corridor is geographically monotonous**. With the single exception of Blue Raman, every system in the table transits the Red Sea and makes landfall in Egypt at Zafarana or Port Said before proceeding to the Mediterranean. Six of the seven terminate at Marseille. This is the topological asymmetry that the framework in section 2 identified as the condition for chokepoint power, and it is the physical fact from which every political dynamic in this paper follows.

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Second, **Chinese participation is present in the majority of systems** but takes different forms. In the Peace Cable it is complete: the supplier is HMN Technologies and the owner is the Hengtong Group. In AAE-1, SEA-ME-WE 5 and SEA-ME-WE 6 it is a consortium stake held by one or more of the three Chinese state carriers alongside Western, Gulf and Asian operators. In the India-Europe Xpress it is a China Mobile stake in a cable co-owned with Reliance Jio Infocomm and supplied by the American firm SubCom. This last configuration is analytically important: it demonstrates that the corridor is not in fact divided into Chinese and non-Chinese systems at the level of ownership, whatever the strategic rhetoric asserts. Thirteen cables in the Middle East and North Africa region are owned, built or upgraded by Chinese entities.

Figure 1. Main existing Submarine Cables Asia-Middle East- Europe

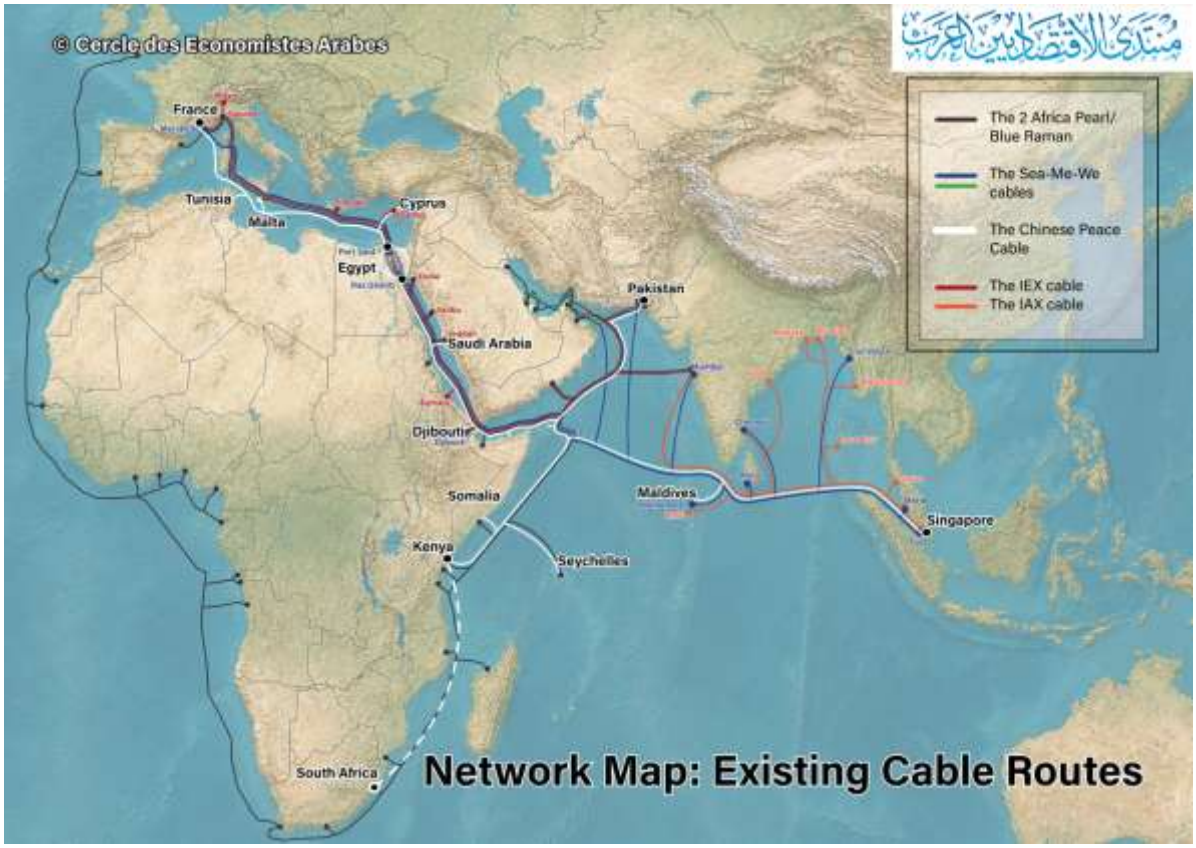


Table 1. Principal Asia to Middle East to Europe submarine cable systems

Cable system	Year	Route	Length	Capacity	Supplier	Principal owners
Peace Cable	2022	Singapore, Seychelles, Karachi, Dubai, Djibouti, Zafarana, Bizerte, Marseille	25,000 km	192 Tbps	HMN (ex-Huawei Marine)	Hengtong Group
AAE-1	2017	Cape d'Aguilar (China), Penang, Zafarana, Bari, Marseille	25,000 km	100+ Tbps	NEC, SubCom	China Unicom, Telecom Egypt, Pakistan Telecommunications and others
SEA-ME-WE 5	2016	Singapore, Sri Lanka, Karachi, Dubai, Yanbu,	20,000 km	24 Tbps	ASN, NEC	China Mobile, China Telecom, China Unicom, Ooredoo, Orange, Singtel, Sparkle,

Cable system	Year	Route	Length	Capacity	Supplier	Principal owners
		Zafarana, Marmaris, Catania, Toulon				Telecom Egypt, Telekom Malaysia, Telkom Indonesia and others
Blue Raman	2025	Mumbai, Salalah, Barka, Duba, Aqaba, Tel Aviv, Chania, Genoa, Marseille	12,000 km	218 Tbps	ASN	Google, Telecom Italia Sparkle, Omantel and others
IEX	2026	Mumbai, Salalah, Djibouti, Zafarana, Jeddah, Neom, Tympaki, Savona, Marseille	9,800 km	200 Tbps	SubCom	China Mobile, Reliance Jio Infocomm
SEA-ME-WE 6	2027	Singapore, Seychelles, Karachi, Dubai, Djibouti, Port Said, Bizerte, Marseille	21,700 km	126 to 132 Tbps	SubCom, HMN	Bharti Airtel, China Unicom, Dhiraagu, Microsoft, Mobily, Orange, PCCW, Singtel, Telecom Egypt, Telekom Malaysia
EMA	Building	Hong Kong, Hainan, Singapore, Pakistan, Saudi Arabia, Egypt, France	25,000 km	100 Tbps (announced)	HMN	China Telecom, China Mobile, China Unicom

Note. IEX is the India-Europe Xpress and EMA the Europe-Middle East-Asia system. Capacity figures are design maxima across all fiber pairs and are not measurements of lit capacity. Utilization of newer systems in this corridor is reported at 30 to 50%. The SEA-ME-WE 6 figure is given as both 126 and 132 Tbps in the source material and is reported here as a range. The EMA capacity carries an explicit interrogation in the source and should be read as an announcement.

Third, **the supply chain is narrower than the ownership structure**. Four firms build submarine cable systems at scale: The Chinese HMN Technologies, the American SubCom, The French Alcatel Submarine Networks (ASN) and the Japanese NEC. HMN Technologies, the successor to Huawei Marine, is one of them, and the exclusion of one of four global suppliers from a market is a materially different intervention from the exclusion of one of forty.

The aggregate matters more than the individual entries. Taking the operating and near-operating systems together, installed capacity across the Asia to Europe corridor is of the order of 500 to 600 Tbps, against approximately 330 Tbps of traffic currently transiting Egypt. In 2024 and 2025 alone, 193 Tbps of new capacity landed. The corridor is not, in these figures, capacity-constrained today. Section 7 argues that this comfortable position dissolves within four years.

4.2 The corridor cable that does not exist

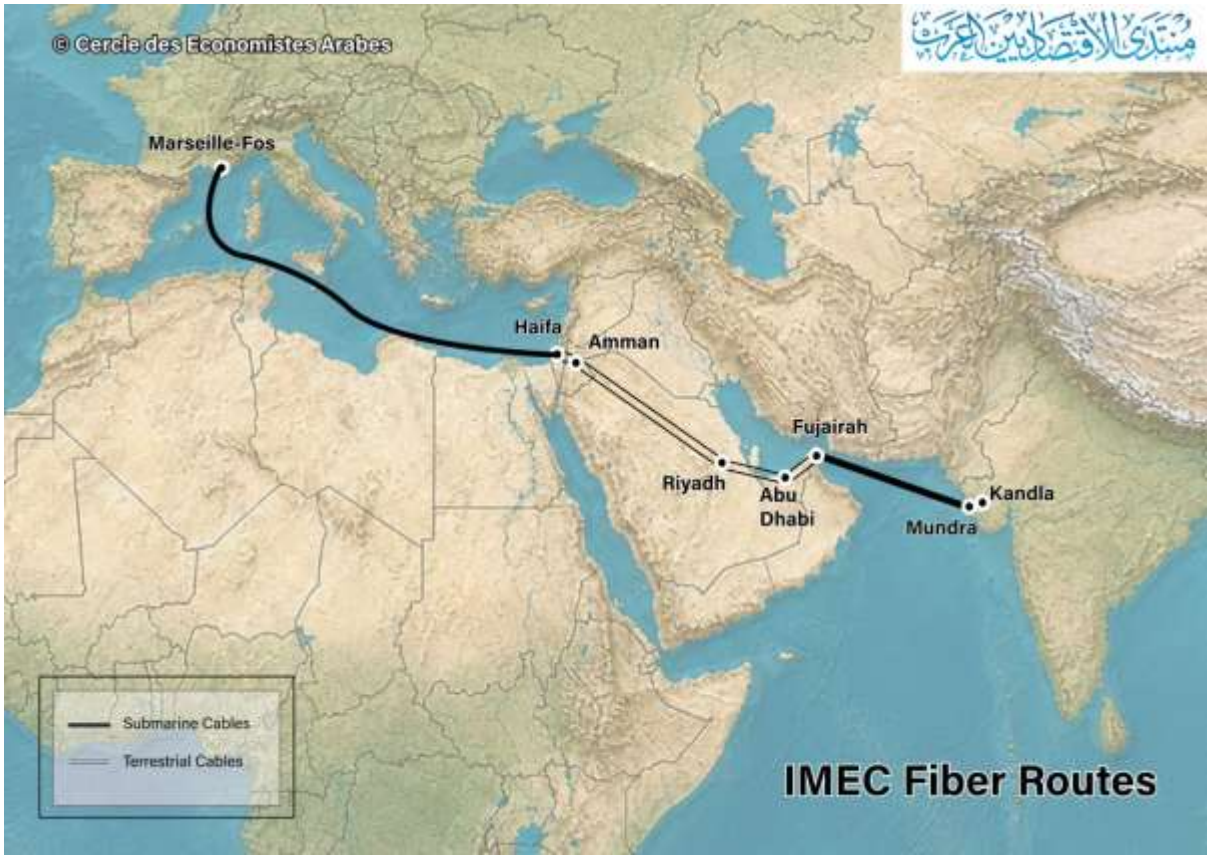
The India-Middle East-Europe Economic Corridor (IMEC) was introduced at the 2023 G20 in New Delhi as a multimodal corridor combining transport, energy and digital pillars, and explicitly as an alternative to Chinese infrastructure dominance. Its digital pillar is customarily described in terms of a dedicated cable running from Mundra and Mumbai through Fujairah, Riyadh and Amman to Haifa and thence to Marseille, at a length of approximately 25,000 kilometers and a capacity of 400 Tbps .

No such cable is under construction. There is no consortium. There is no named supplier, no announced date of service and no financing structure. The digital pillar as it operates today consists of capacity taken on SEA-ME-WE 6 and Blue Raman, which are systems built for other purposes by other parties, supplemented by terrestrial fiber laid alongside the planned rail corridor from Jebel Ali towards Haifa. Table 2 records the position.

Table 2. The IMEC digital pillar: announced position and actual status, July 2026

Attribute	Announced	Actual status
Route	Mundra and Mumbai, Fujairah, Riyadh, Amman, Haifa, Marseille	Levantine segment suspended; Saudi Arabia promoting a terrestrial alternative through Syria, Lebanon and Türkiye
Length	Approximately 25,000 km	Not surveyed as a single system
Capacity	400 Tbps (announced, carries interrogation in source)	Capacity taken on SEA-ME-WE 6 and Blue Raman
Consortium	Not defined	No consortium constituted; UAE promotes the project without one
Supplier	Not named	None
Institutional basis	G20 memorandum of understanding, September 2023	No secretariat, no treaty, no coordinating body
Signatories	India, United States, European Union, France, Germany, Italy, Saudi Arabia, UAE, Israel present but not signatory?	Türkiye excluded; Egypt not a signatory; Oman and Lebanon seeking association

Figure 2. The IMEC cable Route



This is the empirical content of Proposition 3. Where the political configuration on which a route depends is genuinely uncertain, private capital does not select the wrong route; it declines to select, and routes over existing capacity instead. The absence of an IMEC consortium is not evidence of administrative delay. It is the rational response of investors to a twenty-five year specific asset whose value depends on a normalization agreement that has not occurred. Two competing terrestrial proposals

have emerged in the vacuum: a Saudi-promoted route through Syria, Lebanon and Türkiye, and an Emirati-promoted route through Iraq and Türkiye. Both are addressed in section 9.

4.3 The terrestrial alternatives

Overland fiber between China and Europe has existed for longer than the current corridor debate and is organized in three routes, set out in Table 3. Their capacities are an order of magnitude below the submarine systems, which is the fundamental reason that terrestrial corridors have historically supplemented rather than replaced subsea cables. The northern route through Russia carries of the order of ten Tbps, although the planned Trans-Eurasian next generation system is specified at 250 to 480 Tbps.

Figure 3. Belt and Road terrestrial fiber routes

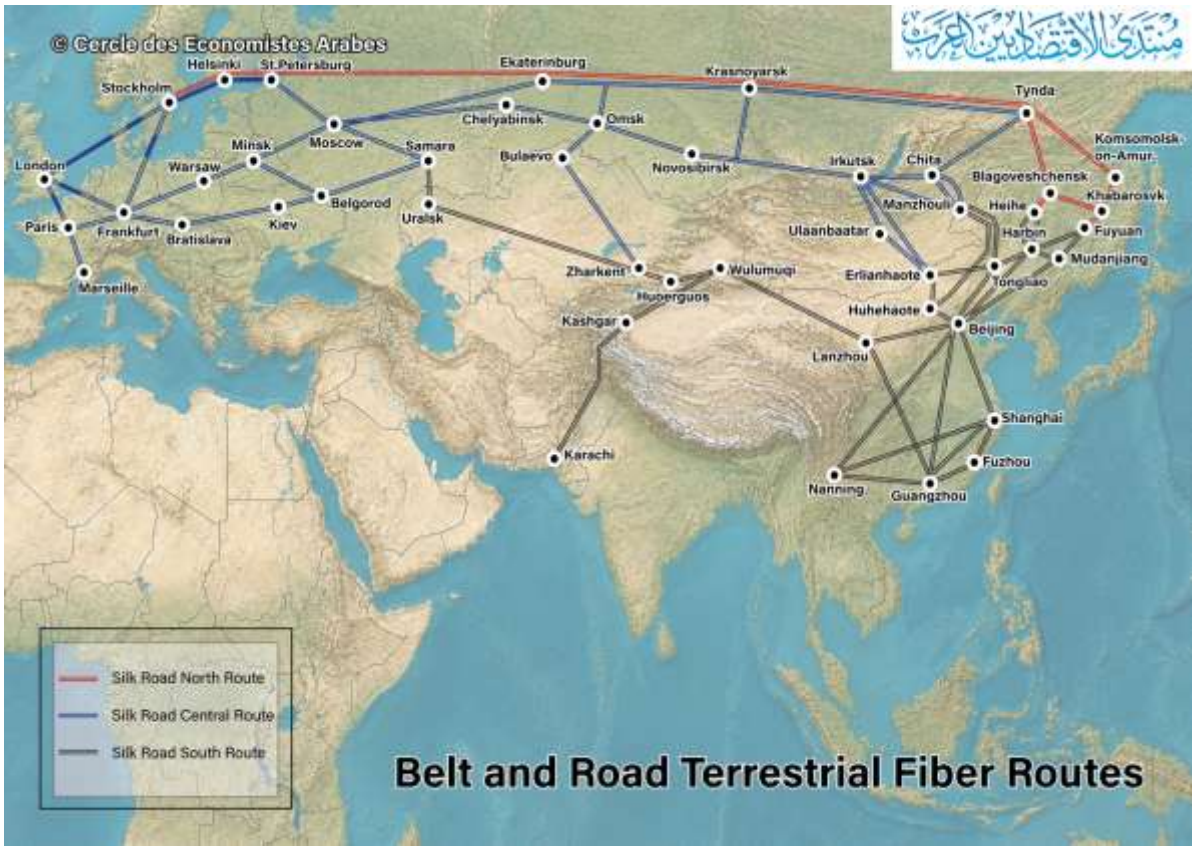


Table 3. Belt and Road terrestrial fiber routes

Route	Path	Principal operators	Length	Capacity	Status
Silk Road North Line	Beijing, Almaty, Moscow, Frankfurt	China Telecom, China Unicom, TransTeleCom, Rostelecom	11,000 km	Approximately 10 Tbps; successor system specified at 250 to 480 Tbps	Operational, expanding
Silk Road Central Route	China, Kyrgyzstan and Uzbekistan, Türkiye, Europe	Not disclosed	11,000 km	Not disclosed	Announced
Silk Road Southern Route	China, Pakistan, Iran and Türkiye, Europe; interconnects with the Peace Cable	Not disclosed	5,000 km	Not disclosed	China to Pakistan segment

Route	Path	Principal operators	Length	Capacity	Status
					operational since 2018

Terrestrial routes carry a strategic significance out of proportion to their capacity, for two reasons. The first is latency. A land path from the Gulf to the Mediterranean is materially shorter than a path around the Arabian Peninsula and through the Red Sea, and latency is the binding performance parameter for the artificial intelligence inference workloads discussed in section 7. The second is that a land route is not exposed to Bab al-Mandab. The corridor competition of 2025 and 2026 is best understood as an attempt to convert this second-order supplement into a first-order alternative, and it is the artificial intelligence demand thesis that makes the attempt commercially arguable.

5. Two corridor doctrines: the Digital Silk Road and the IMEC framework

The corridor competition is frequently described as a contest between China and India, or between China and the United States. This framing is imprecise. What is in competition is not two states but two doctrines of infrastructure provision, which differ in their financing, their supply chain, their contracting form and their governance claims. The two doctrines are examined in turn and compared systematically in Table 4.

5.1 The Chinese doctrine: state-directed, deployed, financed

The Digital Silk Road is a subset of the Belt and Road Initiative (BRI) and has been the object of more than 17 billion dollars of deployment since 2013. Its financing model uses concessionary lending from the China Development Bank and the Export-Import Bank of China, with state-owned carriers anchoring the consortia and a domestic manufacturer, principally HMN Technologies, supplying the system. The Made in China 2025 program sets a target of 60% of the global fiber-optic cable market. In 2019 Chinese entities accounted for approximately 11% of subsea cables, and the projected share for 2030 is 20%.

The flagship asset is the Peace Cable, live since 2024, running from Shanghai through Gwadar and Djibouti to Alexandria and Marseille. Its route is analytically significant because it bypasses India entirely, which is the clearest available statement of the strategic logic: the Chinese corridor is designed to reach Europe without transiting a rival. The Europe-Middle East-Asia (EMA) system, under construction and backed by all three Chinese state carriers together with Telecom Egypt and Zain Saudi Arabia, provides direct Middle Eastern routing. SEA-H2X, an HMN ultra-wideband repeater system connecting South East Asia, is designed to anchor regional cable hubs. Terrestrial fiber is laid alongside the road and rail corridors of the Belt and Road, from Xinjiang through Central Asia and Iran to Türkiye and Europe.

The doctrine has a governance component that is frequently understated in commercial analysis. China promotes a cyber sovereignty model in the International Telecommunication Union (ITU) and in United Nations internet governance bodies, favoring data localization and standards compatible with domestic content control. The corridor is therefore not only a transport asset but a vector for a regulatory model, and states that adopt Chinese infrastructure acquire a technical architecture that makes the associated

regulatory model cheaper to implement than its alternative. This is a mechanism of standards diffusion, and it operates independently of any intention on the part of the host.

The doctrine's vulnerability is exclusion. United States interagency review, conducted through the body known as Team Telecom, blocked HMN Technologies from the SEA-ME-WE 6 consortium despite the firm having submitted the lowest bid, using a combination of incentive packages and sanction threats. The pattern has since been applied systematically. The consequence is not that Chinese systems fail but that their addressable market contracts to states willing to accept the associated political cost, which produces the bifurcation examined in section 10.

5.2 The Indian doctrine: private capital first, multilateral framework second

The Indian position rests on a structural anomaly. India consumes approximately 20% of global data but hosts only 3% of subsea cable landings and 3% of global data center capacity. The gap between consumption and infrastructure is the largest of any major economy and is the fundamental driver of Indian corridor policy. The Indian regulator has demanded a tenfold expansion of capacity to serve domestic demand alone.

The response has been led by private capital rather than by the state. India-Europe Xpress, live since 2024, runs from Mumbai through Oman, Djibouti and Suez to Italy, is co-owned by Reliance Jio Infocom and was supplied by SubCom. India-Asia Xpress, live since 2023, runs from Mumbai and Chennai to Singapore and interconnects with India-Europe Xpress at Mumbai. 2Africa Pearl, inaugurated with STC participation and including China Mobile, Meta, Orange and Telecom Egypt, and Blue Raman, connecting India to the Mediterranean through the Gulf, both expand Indian redundancy. SEA-ME-WE 6, a sixteen-party consortium including Bharti Airtel and Microsoft, was awarded to SubCom following the United States intervention against HMN Technologies.

The multilateral layer, IMEC, was added in 2023 and is at present a framework rather than an asset, for the reasons set out in section 4.2. Its digital pillar contemplates terrestrial fiber laid alongside the rail corridor from Jebel Ali towards Haifa, bypassing the Red Sea chokepoint and delivering low latency between India, the Gulf and Europe. Total corridor investment across all pillars has been estimated at 600 billion dollars. Saudi Arabia has committed twenty billion. An India and United Arab Emirates framework agreement was signed in February 2024, and construction of rail and hub infrastructure began in April 2025.

The commercial logic underlying the digital pillar is the complementarity between Indian data generation, Gulf hyperscale capacity and European demand. India generates the traffic and lacks the compute; the Gulf is building the compute and lacks the traffic; Europe is the terminating market for both. If that complementarity is realized, IMEC's digital pillar has a business case independent of its political rationale. If it is not, the pillar reduces to capacity purchased on cables that would have been built in any case.

Table 4. The two corridor doctrines compared

Dimension	China: Digital Silk Road	India: IMEC and private capital
Architecture	State-directed and centralized	Multilateral in framework, market-driven in execution

Dimension	China: Digital Silk Road	India: IMEC and private capital
Financing	Policy banks and state-owned enterprises; more than USD 17bn since 2013	Private sector balance sheets supplemented by G7 and Partnership for Global Infrastructure commitments
Cable supplier	HMN Technologies, domestic	SubCom (United States) and Alcatel Submarine Networks (France)
Operational status	Deployed; Peace Cable live since 2024	Submarine systems expanding rapidly; IMEC corridor at framework stage
Route logic	Bypasses India through Pakistan and East Africa	Centers India as the origin and regional hub
Middle East reach	Deep; thirteen cables in the MENA region owned, built or upgraded	Growing through IEX and the IMEC framework
Governance model	Bilateral contracting; Chinese standards; cyber sovereignty doctrine at the ITU	Rules-based multilateral memorandum; open internet norms as stated position
Institutional capacity	Complete: lender, supplier and host in a single transaction	Incomplete: eight signatories, no secretariat, no cost allocation mechanism
Principal vulnerability	Systematic exclusion from Western-aligned consortia	Non-decision; dependence on a normalization that has not occurred

Table 4 supports Proposition 4. The Chinese doctrine converts announcements into assets because the transaction requires the assent of two parties. The Indian and Western doctrine distributes legitimacy across eight signatories and provides no mechanism for converting that legitimacy into a financing decision. The comparison is not a judgement on the relative merits of the two political models; it is an observation about contracting form. A multilateral framework that acquired a secretariat with budgetary authority would close much of the gap, and the recommendation in section 12 is framed accordingly.

6. Structural vulnerabilities: chokepoints, exclusion and the institutional vacuum

6.1 The shared chokepoint

Both corridor systems converge on the Red Sea, and the vulnerability is therefore common rather than competitive. In February 2024 four cables were damaged in the Red Sea, disrupting a reported 70% of Asia to Europe and Middle East traffic; a parallel account dates the incident to March 2024 and puts the disruption at 25% of Asia, Europe and Africa traffic. In September 2025 multiple cables were severed again near Jeddah, including SEA-ME-WE 4. In 2025 the Peace Cable was severed in the Red Sea before its Zafarana landing. Neither China nor India has solved this chokepoint, and no announced corridor removes it for existing traffic.

The repair economics compound the exposure and are worth stating precisely, because they determine the duration of any outage rather than its probability. There are sixty-three cable repair vessels in the world. Two to four of them are stationed in the Middle East. A single repair, comprising dispatch, splice and reburial, requires in excess of forty days and costs between 1 and 3 million dollars. Houthi activity, piracy and the geography of Bab al-Mandab render the segment persistently insecure. Egypt transits the traffic but has no capacity to protect the Red Sea segment, and the Center for Strategic and International Studies (CSIS) has described the Egyptian crossing as the internet's most vulnerable place on earth. This despite that the different cables have different landing and exit points in Egypt.

A second chokepoint sits at the other end of the Gulf. Every major Gulf port and cable landing other than those of Oman lies inside the Strait of Hormuz. Iranian threats to close the Strait are therefore existential for Emirati and Saudi digital infrastructure in a way that they are not for Omani infrastructure, and this single geographic fact accounts for a substantial share of the strategic behavior documented in section 9.8.

6.2 Vulnerabilities specific to the Chinese system

Three constraints bind the Chinese doctrine. The first is the exclusion mechanism already described, which is shrinking the addressable market rather than defeating individual projects. The second is attribution risk in physical sabotage. Five cables were cut in the Baltic within fifteen months across 2024 and 2025, and Chinese-flagged vessels were investigated in connection with those incidents. Whatever the outcome of those investigations, the reputational consequence is that Chinese cable presence is now treated by Western regulators as a security variable rather than a commercial one. The third is the ambivalence of the host states themselves. Middle Eastern governments fear data espionage but perceive the risk as symmetric between Chinese and American infrastructure. China accordingly remains in the market while facing rising scrutiny, and the concentration of thirteen regional cables in Chinese hands is itself the trigger for that scrutiny.

6.3 Vulnerabilities specific to the IMEC system

Three constraints bind the Indian and Western doctrine, and they are more severe at present than those binding its rival. The first is the freezing of the Levantine node. The war in Gaza from October 2023 suspended the Israel and Jordan segment on which the IMEC land corridor depends. Saudi normalization with Israel, which was the political precondition for the corridor, stalled. Haifa port, whose container terminal was acquired in 2022 by Adani Ports of India together with the Gadot Group, was struck by Iranian missiles in June 2025. The northern corridor is on hold, and the Middle East Institute assessed in June 2026 that implementation of IMEC remains doubtful.

The second is the institutional vacuum. IMEC rests on a single 2023 memorandum with no permanent coordinating body, and the Atlantic Council has identified this as a critical gap requiring attention at the 2026 G20. In the absence of a secretariat there is no entity capable of allocating the estimated six 100 billion dollars of corridor investment among signatories, no dispute resolution mechanism, and no counterpart with whom a prospective consortium could contract.

The third is financing and intra-European rivalry. Mobilization of the estimated investment is incomplete. European port competition, principally between Marseille, Trieste and the COSCO-held Piraeus, creates political friction over the corridor's European terminus that is unresolved and that no signatory has authority to resolve. India itself remains underserved, with its regulator demanding a tenfold capacity expansion for domestic purposes, which competes for the same capital.

The asymmetry between sections 6.2 and 6.3 should be read carefully. The Chinese system faces a market access problem, which is external, political and potentially reversible. The IMEC system faces an institutional and security problem, which is internal and requires affirmative action by parties that have not so far taken it. On the framework of section 2, a market access problem constrains the rate of expansion; an institutional vacuum prevents the first transaction from closing.

7. The demand shock: Gulf artificial intelligence compute and corridor capacity

The corridor competition would be a second-order matter if traffic growth were incremental. This section argues that it is not, and that the announced Gulf compute buildout implies a step change in Asia to Europe transit demand within four years. The argument proceeds in three stages: the traffic profile of artificial intelligence workloads, the inventory of committed compute, and three demand scenarios with their corridor implications.

7.1 Why artificial intelligence traffic is different

Inference traffic differs from conventional web traffic in three respects that matter for cable planning. Average packet sizes are substantially larger. Flows are asymmetric but of high volume, on the order of ten to 100 times conventional web traffic. And connections are persistent and latency-sensitive rather than bursty and latency-tolerant. The third property is the one with corridor consequences: a workload that tolerates 200 milliseconds of round trip latency can be served from anywhere, whereas a workload that requires low and stable latency must be served from a location with a short and uncongested path to its users.

This is the technical foundation of the Gulf compute thesis. A campus in Abu Dhabi serves inference within a 2,000 mile radius that reaches approximately half of the world's population. The thesis is credible only if the paths from that campus to its users are short and reliable, which is to say only if the corridors are built. The corollary is that the **SilkLink and WorldLink corridors are not optional resilience investments for the Gulf artificial intelligence program**. **They are its enabling condition**. A gigawatt (GW) of compute in Riyadh that can only reach Europe through a congested and periodically severed Red Sea path is a stranded asset.

The growth trajectory implied by these workload characteristics is an addition of 40 to 60% to corridor traffic in 2027 and 60 to 90% in 2028. Against present utilization of 30 to 50% on newer systems, the first year of that trajectory is absorbable and the second is not.

7.2 The committed Gulf buildout

Table 5 records the compute commitments announced for the Gulf as of mid-2026. The inventory is of announcements, with the caveats of section 3.3, and phase one figures are distinguished from headline totals where the source permits.

Table 5. Announced Gulf artificial intelligence compute, mid-2026

Project	Jurisdiction	Scale	Timeline
Stargate	United Arab Emirates	1 GW total; 200 MW phase one live with NVIDIA GB300 hardware; USD 10bn Abu Dhabi campus; G42, OpenAI and Microsoft as anchor tenants	2026 to 2028
Microsoft Azure	United Arab Emirates	USD 15.2bn total, of which USD 5.5bn for artificial intelligence and cloud; more than 21,500 A100-equivalent accelerators already deployed	2024 to 2029
G42 and OpenAI campus	United Arab Emirates	USD 10bn committed	2025 to 2028

Project	Jurisdiction	Scale	Timeline
HUMAIN Riyadh	Saudi Arabia	100 MW phase one	2025
HUMAIN Dammam	Saudi Arabia	100 MW phase one	2025
Taranis-EEC	Saudi Arabia	USD 2bn campuses	2026 to 2027
Oracle dual region	UAE and Saudi Arabia	Operational	Live
Google Middle East cloud region	Oman and UAE	First Middle East region	2026

Note. Saudi Arabia's National Data Centre Strategy of June 2025 targets 1.5 GW by 2030. S&P Global records 222 MW live in the first quarter of 2025 rising to 760 MW by 2030. Aggregating the announced commitments, total committed Gulf artificial intelligence compute by 2028 is of the order of 3 to 4 GW.

7.3 Three scenarios for incremental corridor demand

Three scenarios are constructed. They differ in a single assumption, which is the geographic scope of the market that Gulf compute serves. That assumption is the correct fulcrum because the corridor consequence of a gigawatt of compute depends entirely on whether the traffic it generates terminates locally or crosses the Asia to Europe axis.

Table 6. Incremental Asia to Europe transit demand from Gulf artificial intelligence compute, 2030

Scenario	Central assumption	Incremental demand	Uplift on installed base	Corridor implication
A. Conservative	Gulf compute functions as a regional service; the majority of traffic terminates locally	80 to 120 Tbps	16 to 24%	Announced corridors are sufficient; competition is for share of a slowly growing market rather than for necessary capacity
B. Base case	Gulf functions as the artificial intelligence hub for the population within a 2,000 mile radius, approximately half of the world	300 to 500 Tbps	60 to 100%	Cables under construction today are necessary and will be close to full by 2030 if the buildout proceeds to schedule
C. Aggressive	Gulf becomes the default inference zone for Asia-Pacific and attracts Chinese inference traffic through politically neutral jurisdictions; accelerator export restrictions ease; Saudi capacity scales beyond 1.5 GW	700 to 1,000 Tbps	140 to 200%	All currently planned capacity is exhausted; a second generation of cable construction is required by 2028 to 2029

The distribution of probability across these scenarios is a judgement rather than a calculation, and it is stated as such. Scenario A requires that the Gulf compute buildout fail to attract external workloads, which would render a substantial part of the announced investment commercially unsound and is inconsistent with the anchor tenancy arrangements already signed. Scenario C requires the relaxation of accelerator export restrictions and the routing of Chinese inference traffic through the Gulf, neither of which is currently in prospect but both of which are policy variables rather than physical constraints. Scenario B, in which incremental demand of 300 to 500 Tbps roughly doubles corridor requirements, is the central case.

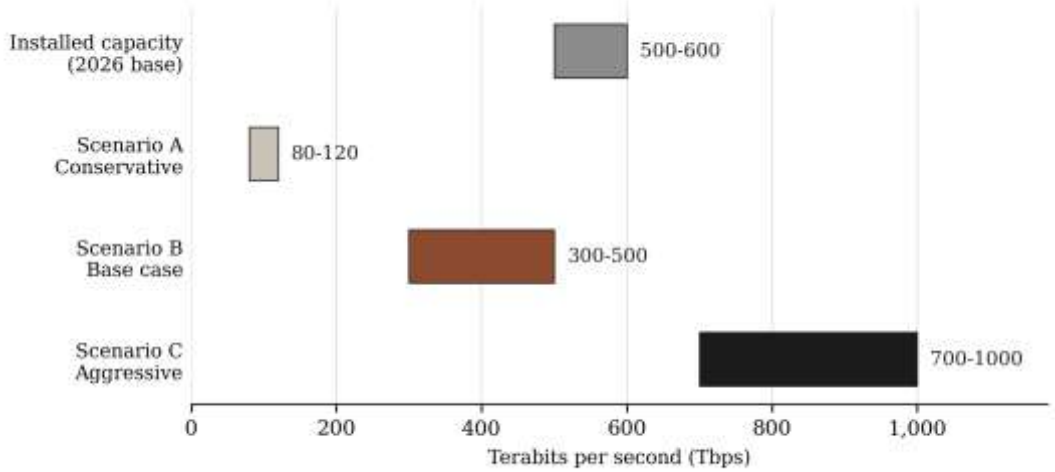


Figure 4. Installed Asia to Europe corridor capacity against incremental artificial intelligence demand by 2030 under three scenarios, terabits per second.

Under that central case the arithmetic of the corridor competition changes character. The installed base of 500 to 600 Tbps becomes fully subscribed. The corridors announced in 2026 cease to be competing claims on a fixed volume of traffic and become complementary components of a system that requires all of them. This is the strongest available argument for the proposition that the SilkLink, WorldLink and IMEC routes may all be built, and it is the principal reason that the fragmentation scenario in section 11 is assigned a probability equal to that of the duopoly scenario.

7.4 The demand thesis and the rent thesis in combination

Sections 2.2 and 7.3 can now be combined, and the combination produces the central analytical result of this paper. Egypt's rent depends on being mandatory. Under low traffic growth, a bypass corridor is a substitute for the Egyptian crossing and its construction transfers rent from Cairo to the bypass host. Under the central demand scenario, a bypass corridor is not a substitute but an addition, because total demand exceeds the capacity of any single path. In the second case Egypt loses share but not volume, and its absolute rent may be stable or rising even as its strategic leverage declines.

The distinction is critical for Egyptian policy and appears not to be reflected in it. Egyptian behavior, examined in section 9.5, is consistent with a belief that the corridor competition is zero-sum, which is a rational reading under low demand growth and a costly error under high growth. A state that believes it is defending a monopoly will price to deter entry, which accelerates entry. A state that believes it is one node in an expanding system will price to maximize throughput, which retains volume. The Egyptian investment in the Sinai crossing corridor, described below, is the behavior of the second belief; the pricing policy is the behavior of the first.

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8. Physical constraints: heat, power and water as limits on the compute thesis

The demand scenarios of section 7 assume that the announced compute is built. This section examines whether it can be. Three physical constraints bind gigawatt-scale artificial intelligence infrastructure in the Gulf: thermal management in an environment where air cooling is not viable, electrical delivery in grids that were not planned for pulse loads of this magnitude, and water in the most water-scarce region on earth. The Emirati and Saudi positions differ materially on each, and Table 7 sets out the comparison.

8.1 Thermal management

Peak ambient temperatures reach forty-two to forty-six degrees Celsius in the United Arab Emirates and forty-six to fifty degrees in Saudi Arabia, with Riyadh summers at the upper end. At rack densities of 60 to 140 kilowatts, which current accelerator deployments require, air cooling is not merely inefficient but physically impossible. Liquid cooling is mandatory in both jurisdictions from the first rack.

This constraint produces a counter-intuitive result that deserves emphasis, because it inverts the conventional assumption that the Gulf is a poor location for data centers. Direct liquid cooling on current generation hardware takes coolant in at approximately forty-five degrees and returns it at approximately sixty-five degrees. Return liquid at sixty-five degrees can be rejected by dry coolers even at forty-six degrees ambient, without evaporation and without a chiller. The thermal disadvantage of the Gulf is therefore severe for air-cooled facilities and modest for liquid-cooled ones. Since artificial intelligence workloads require liquid cooling everywhere, the Gulf's relative disadvantage narrows precisely as the technology moves to the density at which its climate would otherwise be prohibitive. The region's extreme heat has become a forcing environment for next generation thermal management rather than a barrier to it.

8.2 Electrical delivery

The Emirati and Saudi electrical constraints are different in kind, and the distinction is frequently missed in commentary that treats Gulf grids as interchangeable.

The United Arab Emirates possesses the region's only firm clean baseload in the Barakah nuclear complex, which supplies approximately 21% of national electricity. This is the country's principal competitive advantage in attracting hyperscalers with renewable energy commitments. Against it stand transmission losses reported by the responsible minister at 20 to 30%, a renewable mix of approximately 5%, and a distribution network that was not upgraded for the pulse load characteristics of artificial intelligence training. Data centers are projected to rise from approximately 2% to 20% of grid demand between 2025 and 2030. A hyperscaler commitment to 100% renewable supply cannot be met from a 5% renewable mix, and the gap between the commitment and the physical grid is a reputational exposure rather than an operational one, but it is real.

Saudi Arabia has the opposite profile. Generation is sufficient at 66 GW of installed capacity, and construction costs and land availability are more favorable. The binding constraint is delivery rather than generation: the substations, switchgear and transformers required for gigawatt campuses face

global lead times of two to four years, and five to 10 GW of unplanned artificial intelligence demand appears in no grid plan prepared before 2022. Data centers power demand is growing at a compound annual rate of approximately 29% to 2030. There is no nuclear baseload, and a grid that is approximately 70% gas-fired creates a structural conflict with hyperscaler renewable commitments that no amount of solar procurement resolves within the relevant horizon.

8.3 Water

Water is the constraint least discussed and most likely to bind. Projected data center water demand in 2030 is 61 billion liters a year in the United Arab Emirates and more than 75 billion liters a year in Saudi Arabia. A single gigawatt facility on dry cooling consumes 1.5 to 5 million cubic meters a year, and on evaporative cooling 5 to 10 times that. Saudi data centers consumed 15 billion liters in 2024, before the artificial intelligence buildout took full effect.

The regional difficulty is that this water is manufactured. 42% of Emirati drinking water and 70% of Saudi water is desalinated, and Saudi desalination consumes approximately 300,000 barrels of oil a day. Cooling a data center with desalinated water therefore consumes energy to produce water to reject heat, which is a circular and expensive loop. Saudi policy has closed the cheapest exit from that loop: the revision of industrial water tariffs by Marafiq to 8.04 Saudi riyals per cubic meter in December 2025 renders evaporative cooling financially prohibitive in the Jubail and Yanbu industrial zones, which is in practical terms a prohibition.

Two responses are visible. The first is closed-loop liquid cooling, deployed by Microsoft in the United Arab Emirates from 2024, which is reported to save 125 million liters per facility per year. The second is more interesting analytically. Data center waste heat is rejected at forty to sixty degrees Celsius, which is within the operating range of low-temperature desalination. A regenerative configuration in which waste heat drives desalination converts the region's principal liability into a source to produce water. This is speculative at scale but not technically exotic, and it is the single development that would most improve the Gulf's structural position in compute.

Table 7. Physical constraints on gigawatt-scale compute: United Arab Emirates and Saudi Arabia

Constraint	United Arab Emirates	Saudi Arabia
Peak ambient	42 to 46 degrees Celsius	46 to 50 degrees Celsius; Riyadh at the upper bound, the hottest major deployment environment globally
Cooling regime	Mandatory Liquid cooling; deployed at scale by G42 and Khazna	Liquid cooling mandatory from day one; evaporative cooling effectively prohibited by the December 2025 Marafiq tariff of SAR 8.04 per cubic meter
Generation	Barakah nuclear supplies approximately 21% of electricity, the only firm clean baseload in the region	66 GW installed capacity, sufficient in aggregate; no nuclear baseload; approximately 70% gas-fired
Delivery	Transmission losses of 20 to 30%; network not upgraded for pulse loads	Substation, switchgear and transformer lead times of 2 to 4 years; 5 to 10 GW of unplanned load absent from pre-2022 grid plans
Renewable position	Approximately 5 % renewable mix against hyperscaler commitments of 100%	Structural conflict between a gas-fired grid and hyperscaler renewable commitments
Data center share of grid	Approximately 2% in 2025 rising to an estimated 20% by 2030	Approximately 29% compound annual growth in data center power demand to 2030
Water demand 2030	61 billion liters a year	More than 75 billion liters a year

Constraint	United Arab Emirates	Saudi Arabia
Water source	42% of drinking water desalinated; gas-powered desalination, creating an energy and water loop	70% of water desalinated; approximately 300,000 barrels of oil a day consumed by desalination
Mitigation in progress	Closed-loop liquid cooling deployed from 2024, saving approximately 125 million liters per facility per year; regenerative waste heat to desalination under examination	Mandatory liquid cooling from first deployment; no equivalent regenerative program yet announced at scale
Net assessment	Better positioned but not unconstrained: nuclear baseload is a genuine advantage, grid delivery and renewable mix are not	Greater ambition, deeper structural vulnerability: land and capital are available, firm clean power and water are not

The comparative conclusion is that the Emirati position is superior on firm clean power and inferior on nothing of first order, while the Saudi position is superior on land, cost and installed generation and inferior on baseload quality, water and delivery lead times. Neither constraint set is disqualifying. Both are sufficient to make the 2030 timelines in Table 5 optimistic, and a delay in the compute buildout translates directly into a delay in the traffic growth of section 7, which in turn relieves the corridor pressure that justifies the corridors. The physical constraints are therefore not a separate topic from the corridor competition; they are the mechanism that could convert the base case into the conservative one.

9. Eight national strategies: a structured comparison

This section is the empirical core of the paper. Each case is examined against the common analytical questions set out in section 3.1. The cases are ordered by the nature of the network position each state occupies rather than alphabetically or by size, since position is the variable that the framework identifies as determinative: the two Gulf originators first, then the contested Levantine node, then the two mandatory transit states, then the three emerging or auxiliary nodes.

9.1 United Arab Emirates: compute supernode and transit gateway

The Emirati strategy is to be simultaneously the region's hyperscale compute center and the gateway node for every corridor, irrespective of which corridor prevails. It is the only case in the sample pursuing both objectives at scale, and the combination is coherent: compute generates the traffic that makes transit valuable, and transit makes the compute reachable.

On compute, the commitments are the largest in the region. Stargate is a 1 GW, 10 billion dollar campus in Abu Dhabi, with a first 200 megawatt (MW) phase live in 2026 on current generation accelerators, anchored by G42, OpenAI and Microsoft, and designed to serve inference within a 2,000 mile radius reaching approximately half of the world's population. Microsoft's total Emirati commitment stands at 15.2 billion dollars, of which 5.5 billion is allocated to artificial intelligence and cloud between 2026 and 2029, and which Analysys Mason has characterized as the largest single-country technology investment in any emerging market. More than 21,000 500 A100-equivalent accelerators are already deployed.

On transit, the Emirati position is deliberately plural. WorldLink, announced in February 2026 at 700 million dollars, is a consortium of Breeze Investments, Tech964 and DIL Technologies running a subsea segment from Fujairah to the Faw Peninsula and then overland to Türkiye, with a design capacity of 900 Tbps, bypassing both the Red Sea and Suez and explicitly configured for hyperscaler and artificial

intelligence workloads. The SING cable connects South East Asia, India and the Gulf with landings at Fujairah and Dubai, with du having invested in 2024. 2Africa lands at Fujairah, making the United Arab Emirates an anchor node on the longest cable system in the world, and FALCON provides Gulf to Europe capacity. On IMEC, the Emirati posture is promotional rather than contractual: the country presents the corridor as an outgrowth of its security relationships with Israel and India and describes itself as the corridor's front door, while no consortium has been constituted and the project is impeded by the suspension of Saudi and Israeli normalization.

The competitive dynamic with Saudi Arabia is explicit rather than inferred. WorldLink was announced ten days after SilkLink. The two projects reach the same European terminus by different territories, one through Iraq and one through Syria, and each is sponsored by a different Gulf capital. This is the clearest single piece of evidence for the argument in section 10.1 that Gulf corridor competition, rather than great power competition, is the proximate driver of route proliferation.

The binding constraint is physical rather than political. Power and cooling are the limiting factors identified in section 8, grid capacity lags demand, and 91% of available data center capacity across Europe, the Middle East and Africa are already leased, which means that new demand must be met by new construction rather than by absorption of vacancy. The secondary constraint is geographic: Jebel Ali, Khalifa and every other major Emirati port and landing lies inside the Strait of Hormuz, and the Emirati compute position is therefore exposed to an Iranian escalation in a way that the Omani position is not.

9.2 Saudi Arabia: corridor architect and rule-setter

The Saudi strategy is not to build the fastest route but to define the framework within which routes are built. The stated ambition is that regional corridors should converge on Riyadh, and the instruments are sovereign concessions to state-controlled operators, bilateral packages that combine digital infrastructure with unrelated sectors, and the systematic pursuit of rule-setting positions.

SilkLink is the flagship. Announced in February 2026 at 800 million dollars, it is held 75% by STC Group and 25% by the Syrian Sovereign Fund, and comprises 4,500 kilometers of terrestrial fiber across Syria, associated data centers, and a submarine cable landing station at Tartus, with a design capacity of 100 Tbps. It forms part of a 5.3 billion dollar Saudi and Syrian bilateral package that also covers aviation and water. The competitive process by which STC was selected, in preference to Etisalat, Ooredoo and Zain, is described in the source material with reservation as to its openness.

The East-to-Med Corridor illustrates the political logic more sharply than SilkLink does. The original configuration ran from Saudi Arabia through Jordan and Israel to Greece. Following October 2023, Saudi Arabia has pursued a rerouting through Syria. As of November 2025, the presentation materials of the Greek counterparty still depicted the Israeli path, which indicates that the diplomatic contest over the route was live rather than settled. Middle East Eye has reported the Saudi position as a preference that roads, cables and railways run through Syria. The Hejaz corridor completes the picture: a Türkiye and Saudi memorandum signed in Riyadh on 9 June 2026 covers railway cooperation via Syria and Jordan together with a terrestrial fiber route along the same geography, with a feasibility study due at the end of 2026 and a long-term extension contemplated to Oman and the Indian Ocean.

The domestic compute program supports the corridor position. The National Data Centre Strategy of June 2025 targets 1.5 gigawatts by 2030. HUMAIN campuses at Riyadh and Dammam each carry a 100 MW first phase from August 2025, and Taranis-EEC has committed two billion dollars. S&P Global records 222 MW live in the first quarter of 2025 against 760 MW projected for 2030.

The Saudi relationship with IMEC is the most consequential unresolved question in the sample. Saudi Arabia committed twenty billion dollars to the corridor and is its political hinge, since normalization with Israel was the precondition on which the Levantine segment depended. That normalization stalled after October 2023, and the Crown Prince has publicly characterized Israeli conduct in Gaza as genocide. Saudi Arabia is now financing corridors that bypass Israel entirely. The North-South Railway from Dammam through Riyadh and Tabuk to al-Hadithah was intended to link to Jordan for IMEC purposes; SilkLink offers an independent path that requires no Israeli cooperation. The construction of an alternative is, in the framework of section 2.3, an implicit rejection of the IMEC route model, since a state that expected normalization would not sink 800 million dollars into a twenty-five year specific asset premised on its absence.

9.3 Israel: the frozen hinge and the contrarian compute bet

9.3.1 Corridor position

Israel occupies the position that IMEC was designed to require and that the corridor can no longer use. Its northern freight corridor is frozen, Haifa port was struck by Iranian missiles in June 2025, Saudi normalization is suspended, and escalation with Iran continued into 2026. The Middle East Institute assessed in June 2026 that implementation of IMEC remains doubtful.

An important qualification applies to the conventional framing of Israel's corridor value. Within IMEC it is the data infrastructure, rather than the rail and freight infrastructure, that could plausibly make Israel a credible alternative to Egypt. The port capacity does not support the freight thesis: Haifa and Ashdod combined offer approximately 3 million twenty-foot equivalent units of potential, scalable to 5 million with the Jordanian rail link, which is not of the order required to substitute for the Suez Canal. Neither terminal can scale to that role.

The data position is more interesting but also constrained. The existing cables to Europe, comprising MedNautilus at four Tbps, Jonah at thirteen and Tamares North, are an order of magnitude too small to compete with the Egyptian route. The serious asset is the Blue system, which becomes strategically significant only if linked with Raman at 218 Tbps, alongside Andromeda. Israel's corridor value is therefore a potential rather than an installed position, and realizing it requires exactly the political conditions that are absent.

Two structural complications compound the position. The first is Chinese: the state-owned Shanghai International Port Group operates the newer and larger Bay Port terminal at 830,000 twenty-foot equivalent units under a 25 year lease signed in 2021. A corridor designed as a non-Chinese alternative therefore has, at its Mediterranean node, a terminal operated by a Chinese state enterprise. Review by the United States and Israel is under way, but early termination would be legally complex and diplomatically expensive. The second is the Saudi bypass, which is existential rather than competitive: if the Syrian routing of SilkLink and the East to Med Corridor succeeds, Israel loses both the transit rents and the regional integration that IMEC was designed to deliver.

Four conditions would unlock the position, and they are worth stating as a set because none is sufficient alone: a ceasefire in Gaza with a credible political process, which would permit Saudi normalization to resume; de-escalation with Iran, which would restore confidence in Haifa; renegotiation of the Shanghai International Port Group lease, which would remove Chinese control of the Mediterranean node; and the inclusion of Lebanon, which would create a route variant that reduces the corridor's dependence on Israeli normalization. The Lebanese factor is new. President Aoun formally requested the inclusion of Beirut and Tripoli in IMEC on 25 February 2026, three days before the Israeli and Iranian escalation, with French mediation. Its significance is that it offers IMEC a path that does not require the political precondition that has failed.

9.3.2 The compute strategy

Israel's approach to artificial intelligence infrastructure is structurally different from that of the Gulf states and is best understood as a bet against the gigawatt thesis rather than a weaker version of it. Saudi Arabia possesses land, capital and energy and lacks talent. Israel possesses talent and lacks compute scale. Rather than compete on installed gigawatts, Israeli policy wagers that talent, software intellectual property and specialization compound faster than capacity.

The instruments are three. A National Artificial Intelligence Directorate was approved unanimously by cabinet in May 2026 with three objectives: attracting diaspora talent, procuring 5,000 top-tier accelerators a year for six years from 2027 to 2032, and establishing acceleration centers. Its budget is constrained, with only one fifth of the 2021 plan of five point three billion shekels released. NVIDIA has acted as anchor investor with a 1.5 billion dollar, 30MW liquid-cooled facility at Mevo Carmel live in the first half of 2026 and a 160,000 square meter campus at Kiryat Tivon for more than 10,000 employees, alongside seven existing research centers, a tripling of the Beersheba facility by mid-2026 and a doubling of Amazon Web Services capacity. A regulatory fast-track created a Single Approval Authority in February 2026 that cut planning timelines from twenty-four to thirty-six months down to twelve to eighteen, with the NVIDIA and Amazon commitments following within weeks.

The scale asymmetry remains extreme and should not be understated: Israel's national supercomputer holds 1,000 accelerators against 500,000 approved for the United Arab Emirates in 2025 alone.

Where Israel has a defensible physical advantage is thermal. The coastal belt peaks at thirty-two to thirty-five degrees Celsius, some fifteen degrees below Riyadh, which makes free-air cooling viable for six to eight months a year and liquid cooling optional rather than mandatory, supporting power usage effectiveness of 1.5 to 1.0 without Gulf-scale cooling infrastructure. Mediterranean seawater sits at eighteen to twenty-two degrees year round against twenty-eight to thirty-two in the Persian Gulf and twenty-six to thirty in the Red Sea, and is less mineralized, requiring less pre-treatment; deep Mediterranean water is directly viable as a free cooling loop. Underground siting offers a natural thermal mass at 18 to 20 degrees, and the NED Alpha campus planned for 2027 combines a fortified underground design at 100 kilowatts per rack of direct liquid cooling with hardened physical and cyber security. Israel desalinates 67% of its drinking water and leads the technology, which makes the regenerative configuration described in section 8.3 more immediately achievable there than in the Gulf.

The binding constraint is electricity. Israeli power costs 10 to 15 US cents per kilowatt hour against approximately 4 cents in the United Arab Emirates, a gap worth 100 to 150 million dollars a year at

gigawatt scale. There is no government capacity planning for artificial intelligence loads and storage facility licensing is delayed.

The strategic implication is that Israel is not a rival to the Gulf compute program but its natural complement: research and development, chip design, algorithms, cybersecurity and sovereign models on one side, mass training and inference capacity on the other. The configuration in which both parties gain combines Gulf capital and energy with Israeli talent and Mediterranean cooling. That configuration is frozen by the Gaza conflict and the Palestinian question, and normalization is its only unlock. This is the second appearance in this paper of the same causal variable, and section 10.2 treats it as the system's master constraint.

9.4 Türkiye: the unavoidable Eurasian bottleneck

Türkiye occupies the most favorable position in the sample and did so without joining any corridor framework. Every overland corridor seeking Europe must cross Anatolia. The Middle Corridor, WorldLink and SilkLink all terminate in or transit Türkiye, and the Hejaz revival runs from Türkiye through Syria and Jordan to Saudi Arabia. Türkiye was deliberately excluded from IMEC on account of its Belt and Road-adjacent posture, its relations with Hamas and its tensions within the Atlantic alliance, and the Institute for National Security Studies records that Türkiye views the corridor negatively. The exclusion has proved immaterial and possibly advantageous, since Türkiye captures transit value from every corridor that IMEC fails to displace.

The physical position is substantial. Türk Telekom's fiber network is recorded at four 496,000 kilometers as of 2025 in one account and at more than 605,000 kilometers in 2024, up from 425,000 in 2020, in another; the discrepancy is noted in section 3.3, and the direction of travel is not in doubt. The international arm operates across 24 countries with 135 digital access points, and its domestic monopoly has been extended to 2050 against a 3 billion dollar payment and a 17 billion dollar investment commitment. The DE-CIX Istanbul exchange surpassed 500 gigabits per second in August 2025 and reached 533 gigabits per second in September, a rise of 42% within the year, and the Istanbul interconnection market is projected to double by 2030. Equinix operates the IL2 and IL4 campuses with IL3 at 9 MW due in 2026. Submarine landings comprise SEA-ME-WE 3, SEA-ME-WE 5, MedNautilus and KAFOS, with GREENMED planned.

Three developments extend the position. The Middle Corridor runs from China through Central Asia and the Caspian, with Trans-Caspian fiber due in 2026, through Georgia to Türkiye and Europe, and includes the TurkNet and SOCAR Fiber route of 1,850 kilometers laid along the TANAP gas pipeline from Georgia to Greece. A memorandum between Turkcell and Sparkle signed in March 2025 contemplates a submarine cable from Izmir to Milan, which would provide a clean European exit for all eastbound traffic entering Türkiye while bypassing the Levant entirely. The Istanbul Northern Railway Corridor, at 8.1 billion dollars with World Bank support, would raise Bosphorus rail capacity from 3 million to 50 million tons.

The Turkish case is the clearest available demonstration that in a corridor competition, geography that cannot be avoided is worth more than membership in the institution that organizes the competition. Turkcell Superonline already supplies internet access to Iran, Iraq, Georgia and Northern Cyprus. Equinix, Turkcell and DE-CIX will capture interconnection value regardless of which corridor prevails,

and Türkiye plausibly benefits most from IMEC's failure, since the alternatives to IMEC all run through Anatolia while IMEC itself does not.

9.5 Egypt: the irreplaceable chokepoint that fears redundancy

Egypt is the mandatory node of the present system and the case that most directly tests Proposition 2. Approximately 17% of global internet traffic transits Egyptian territory, and approximately 90% of Europe to Asia and Europe to Africa data. More than 20 submarine cables landed in Egypt as of June 2025 and Telecom Egypt operates 330 Tbps of transit capacity.

The asset is the Trans-Egypt corridor, the only commercial route linking Red Sea cables to the Mediterranean, comprising 12 diverse terrestrial crossing routes and 11 landing stations at Alexandria, Abu Talat, Suez, Zafarana, Sidi Krir, Port Said and Ras Ghareb together with 4 new Sinai stations. Operators pay substantial transit fees to a state-owned monopolist, and those fees are the source of Egypt's leverage and its most politically sensitive asset.

Egypt has responded to the bypass threat with capacity investment rather than with price reform, which is the behavior that Proposition 2 predicts of a fiscally committed incumbent. The Sinai program adds 4 landing stations, at Sharm El Sheikh and Taba on the Red Sea, Romana on the Mediterranean and a second Port Said station west of the Canal, creating a second crossing corridor entirely independent of the Suez crossing and reducing single point of failure risk. It is the first material addition to Egyptian crossing infrastructure in over a decade. The Coral Bridge link to the Aqaba Digital Hub in Jordan became operational in August 2025. The cable portfolio has been extended with 2Africa landing at Ras Ghareb and Port Said, SEA-ME-WE 6 live in 2025, the Medusa extension to Port Said, Africa-1 and AAE-2.

The Coral Bridge deserves particular attention because it changes the Egyptian option set. Egypt is not an IMEC signatory, but a functioning Egypt to Jordan fiber link means that IMEC's alternative routing through Jordan could exit to the Mediterranean through Egypt rather than through Israel. Egypt has thereby acquired, at low cost and without any political commitment, the position of fallback Mediterranean gateway should the Haifa corridor remain frozen. This is hedging in the precise sense of section 2.5.

Against these strengths stand three exposures. The first is the bypass. Every overland corridor announced in 2025 and 2026 avoids Egypt: SilkLink through Syria and Türkiye, WorldLink through Iraq and Türkiye, the IMEC land route through Israel and Jordan, and the Belt and Road Middle Corridor through Central Asia. The Center for Strategic and International Studies assessed in January 2026 that loss of Egypt's position as a cable hub could significantly affect its economy. The Egyptian information and communications technology sector contributed 5.1% of gross domestic product in 2022 and 2023, and transit fees are a material foreign currency earner for a country facing acute dollar shortage.

The second is pricing, and it is the mechanism that converts the first exposure into a certainty. The crossing monopoly has permitted Telecom Egypt to charge fees that operators describe as exorbitant, with the specialist press reporting that prices have risen sharply, while operators had no practical alternative to paying them. Every Gulf corridor project cites transit fee reduction among its commercial justifications. The monopoly that generates Egypt's revenue is simultaneously financing its competitors,

and reform is politically difficult precisely because Telecom Egypt is state-owned and its contribution to the treasury is required.

The third is the security of the Red Sea segment, which Egypt transits but cannot protect, with the repair economics set out in section 6.1.

Figure 2 places the digital corridor in the context of Egypt's other transit rent and clarifies both the scale and the direction of the risk.

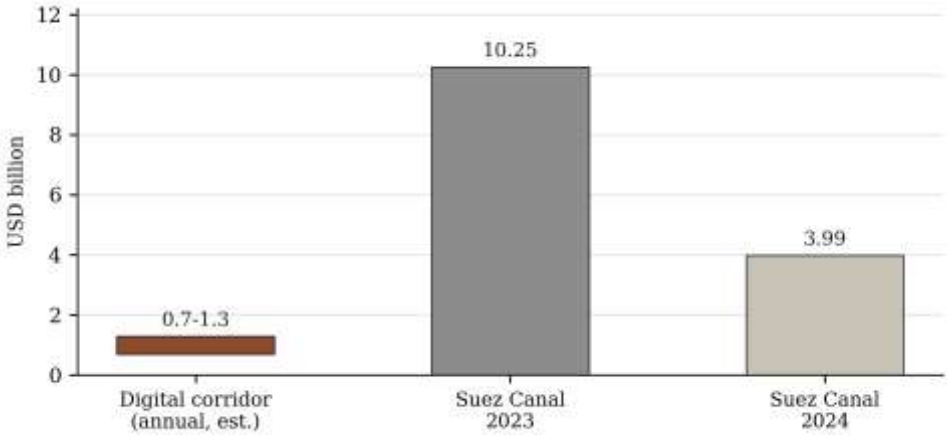

Figure 5. Egyptian transit revenues: estimated annual digital corridor income against Suez Canal receipts, United States dollars billion. Canal receipts in 2024 reflect the Red Sea disruption.

Digital corridor revenues of between 0.7 and 1.3 billion dollars a year are an order of magnitude below the 10.5 billion dollars the Suez Canal earned in its record year of 2023. But the comparison also carries the warning. Canal receipts fell to 3.99 billion dollars in 2024 under the Red Sea disruption, a decline of more than 60% in a single year, which demonstrates how rapidly a transit rent can be destroyed by a security event that the transit state does not control. Egypt's digital rent is smaller, more stable and, unlike the Canal, still growing. It is also the rent that the bypass corridors are specifically designed to capture.

The Egyptian position overall is well described by a single formulation: **Egypt is the corridor that every party is attempting to bypass, and the only one that collects a fee while they attempt it**. Its geopolitical posture is correspondingly non-aligned. It hosts cables from all parties, each charges the same crossing fee, and has joined neither IMEC nor the Belt and Road. One quiet dependency qualifies this neutrality: China Mobile is a significant stakeholder in the India-Europe Xpress cable that uses the Egyptian crossing, and Egyptian indebtedness to Chinese infrastructure lenders means that Cairo cannot afford to antagonize Beijing even as it deepens relations with Washington and the Gulf.

9.6 Iraq: The Development Road and a first international landing

Iraq's corridor position is the newest in the sample and the least institutionally supported. WorldLink, at 700 million dollars, is carried by a consortium of Tech964, DIL Technologies of the Kurdistan Region and Breeze Investments of the United Arab Emirates. Its subsea segment runs from Abu Dhabi to the Faw Peninsula and then overland to the Turkish border, with 900 Tbps of design capacity, private funding and a five-year rollout. No construction contractor has been named.

A second project addresses a more basic gap. Iraq has historically had no international submarine cable landing of its own and has depended on overland transit through neighbors for international connectivity. The FIG cable, through a partnership between Ooredoo Group and Iraq Telecom, would provide the first. The distinction between the two projects is worth preserving: WorldLink is a transit play that monetizes Iraqi geography, while FIG is a sovereignty play that reduces Iraqi dependence on Turkish and Kuwaiti transit.

Both sit within the Development Road, the 17 billion dollar program launched in 2023 to link Faw Port to Türkiye by rail and road over 1,200 kilometers, with a 2.6 billion dollar expansion of Faw Port under way. WorldLink follows the same physical corridor. If both succeed, Iraq becomes a genuine dual-use transit state carrying goods and data on a single right of way, which is a materially stronger position than either alone because it allows the fixed costs of corridor security to be spread across two revenue streams.

The constraints are severe and concentrated on execution rather than on strategy. Security remains fragile. Political instability, including the influence of the Popular Mobilization Forces, affects the operating environment. Tensions between the federal government and the Kurdistan Region bear directly on the northern segment through which WorldLink must pass. There is no named contractor. And until FIG is delivered, Iraq's international connectivity remains dependent on the same neighbors whose leverage the corridor is intended to reduce.

9.7 Syria: post-war transit revival as first inward investment

Syria is the case in which corridor politics and post-conflict reconstruction are least separable. The fall of the Assad power system in December 2024 produced an interim administration that made digital infrastructure an early priority, and SilkLink was its first major inward investment announcement. The Ministry of Communications launched the tender in May 2025, and STC Group was awarded it in February 2026 in preference to Etisalat, Ooredoo and Zain, with the competitiveness of that process qualified in the source material.

The project comprises 4,500 kilometers of terrestrial fiber, associated data centers and a submarine cable landing at Tartus, at 100 Tbps of design capacity, held 75% by STC and 25% by the Syrian Sovereign Fund, within a 5.3 billion dollar Saudi and Syrian package. A first international submarine cable, Medusa, is also planned for Tartus. The architecture contemplates a switching hub at Palmyra in central Syria with nodes connecting Iraq, Jordan, Lebanon and Türkiye.

The geographic case is genuinely strong and is independent of the politics that produced the project. Syria sits on the shortest land path from Saudi Arabia and the Gulf to Türkiye and Europe. The corridor revives a transit function that predates the modern state system, and unlike most reconstruction proposals it monetizes a durable geographic fact rather than an assumed recovery of pre-war economic activity.

The constraints are correspondingly severe. Fifteen years of conflict destroyed much of the physical and institutional infrastructure on which the project depends. United States and European sanctions remain partially in force. The transitional government's political durability is untested. Technical capacity is limited. The announced construction timeline of 18 to 24 months is optimistic given ground

conditions. And WorldLink, through Iraq, is a direct competitor for the same European traffic, sponsored by a rival Gulf capital with deeper capital markets and a more stable transit territory.

Syria is therefore the highest-variance case in the sample. Its geography commands the best route; its engagement in the digital economy opens the way for accelerated growth; its institutions are the least able to guarantee it. In the framework of section 2.3, this is the configuration in which asset specificity is most punishing: an 800 million dollar sunk asset across a territory whose governance may not survive the construction period.

9.8 Oman: the neutral bypass and the quiet supernode

Oman is the most instructive case in the sample because its position rests on two assets that are not capital, namely geography and credible neutrality, and because it demonstrates the return to both.

The geographic asset is precise. Every major Gulf port and cable landing other than Oman's sits inside the Strait of Hormuz (except Fujairah in the UAE). Iranian threats to close the Strait are therefore existential for Emirati and Saudi digital infrastructure. Besides Fujairah in the UAE, only Oman has ports with direct Indian Ocean access outside the Strait: Duqm within its special economic zone, on global shipping lanes; Salalah, among the best-connected telecommunications nodes in the region; and Sohar, linked to Al Ain by the Hafeet Rail project agreed in 2024. The Atlantic Council has described Omani access to the Arabian Sea as an important auxiliary that bypasses Hormuz and a valuable corridor enhancement.

Figure 6. The FALCON and SING Cable routes

The installed base already reflects this. Oman hosts 18 submarine cables and 5 cable landing stations as of 2025, the highest count in the Gulf Cooperation Council, including 2Africa at Barka and Salalah, the Peace Cable, EIG, SEA-ME-WE 5, SEA-ME-WE 3, FALCON, the Oman and Emirates Gateway and FIG. The Oman and Emirates Gateway, operational since July 2025, is a 275 kilometer dual-route system built by Omantel and du linking Dubai, Barka and Salalah, combining subsea and terrestrial paths for five nines availability and designed as an artificial intelligence and hyperscaler backbone. FIG, due in late 2027 and built by Alcatel Submarine Networks for Ooredoo, is a 720 Tbps intra-regional loop connecting Qatar, Oman, the United Arab Emirates, Bahrain, Saudi Arabia, Kuwait and Iraq, designed explicitly to reduce Gulf dependence on long-haul routes through the Red Sea or Hormuz. SONIC, announced jointly by STC and Ooredoo in February 2025, links Saudi and Omani landing stations by terrestrial fiber and gives Saudi Arabia the Indian Ocean exit it otherwise lacks.

Data center development has followed the cable position rather than preceding it. Equinix opened SN1 at Salalah in November 2024, the first carrier-neutral facility in southern Oman and the second in the region after Dubai. Ooredoo combined a Class-3 facility with a cable landing station at Salalah in August 2025. Oracle's dual-region architecture became operational in October 2025 and Google's first Middle East cloud region is planned for Oman in 2026. Omantel's Otech platform, launched in February 2026, is the first Amazon Web Services accredited sovereign cloud in the region. The Omani data center market is projected to grow from 288 million dollars in 2025 to 432 million by 2031, a compound rate of approximately 9.3%.

The political asset is the more interesting one. Oman maintains diplomatic relations with Iran, uniquely within the Gulf Cooperation Council, and has hosted United States and Iranian back-channel discussions. It takes no side in the Emirati and Saudi rivalry. It is neither in IMEC nor aligned with the Belt and Road. The consequence is that Oman is the one Gulf jurisdiction that China, the United States, India, Saudi Arabia and Iran can each accept, which makes it the natural host for cables that must be politically admissible to all parties. This is the direct confirmation of Proposition 5: Oman's landing count is disproportionate to the size of its economy because neutrality is the scarce input.

The strategic logic extends to IMEC. Oman was not an original signatory, but analysts and Indian corridor envoys increasingly propose Duqm and Salalah as alternatives to Gulf ports exposed to a Hormuz closure. Oman signed a corridor-adjacent logistics memorandum with India in April 2025, bilateral trade is expanding, and the Duqm free zone already hosts Indian industrial projects. The argument is compelling on its own terms: adding Oman makes IMEC resilient to a Hormuz closure without requiring any new political alignment from any party, which in a corridor whose principal defect is its dependence on an unavailable political alignment is an unusually cheap improvement.

The constraint is the size of the domestic market. Oman is a transit hub by necessity rather than a data consumer market, and its Vision 2040 target of a 10% digital contribution to gross domestic product requires attracting hyperscalers rather than generating demand domestically. Its position is therefore durable but derivative: it depends on the continued growth of traffic originating elsewhere.

9.9 Comparative synthesis

Table 8 sets the eight cases side by side against the common questions of section 3.1.

Table 8. Eight national positions in the Asia to Europe corridor competition, 2025 to 2026

Country	Principal project	Network role	Partners	Investment	Status	Alignment	Principal risk
UAE	WorldLink and Stargate	Compute hub and transit gateway	Iraq, India	USD 10bn+ in compute; USD 700m in cable	Active and leading	United States aligned; promotes IMEC	Proximity to Iran; inside Hormuz
Saudi Arabia	SilkLink and East to Med Corridor	Corridor architect	Syria, Türkiye	USD 5.3bn Syria package	Deploying	Hedging; post-IMEC posture	Normalization freeze
Israel	IMEC Haifa node	Mediterranean gateway	India, EU, United States	Dependent on others	Frozen	United States and India aligned	War; the Saudi bypass
Türkiye	Transit for all corridors	Unavoidable bottleneck	All corridors	USD 8.1bn rail; USD 17bn telecom commitment	Active construction	Belt and Road adjacent	Excluded from IMEC
Iraq	WorldLink and Development Road	Emerging transit hub	UAE, Türkiye	USD 700m plus USD 17bn	Early stage	Non-aligned	Security and political fragility
Syria	SilkLink	Post-war transit revival	Saudi Arabia via STC	USD 800m	18 to 24 month build	Saudi aligned	Fragile governance
Oman	OEG, FIG and SONIC	Neutral Hormuz bypass	UAE, Saudi Arabia, India	USD 492m data center market by 2031	Active and expanding	Neutral to all parties	Small domestic market
Egypt	Trans-Egypt crossing and Sinai corridor	Mandatory chokepoint	All parties through transit fees	330 Tbps of transit capacity	Operational but exposed	Balancing all sides	Bypass competition

Three patterns emerge from the comparison and are worth stating explicitly, since each bears on a proposition from section 2.

First, the states with the strongest positions are those that occupy geography that cannot be avoided, namely Türkiye and Egypt, rather than those that have joined the most frameworks. Türkiye is excluded from IMEC and transits every alternative to it. Egypt has joined nothing and carries 90% of the traffic. Israel, by contrast, is a (virtual) signatory to the corridor built around it and carries almost none. Membership in an institution is not a substitute for a position in a network.

Second, the states pursuing compute and transit simultaneously, namely the United Arab Emirates and to a lesser extent Saudi Arabia, are pursuing the only strategy that generates its own traffic. Pure transit states depend on flows originating elsewhere and are therefore exposed to decisions taken in Mumbai, Shanghai and Frankfurt. This is the structural difference between a corridor rent and an industrial position, and it is the reason the Emirati strategy is the most robust in the sample despite its Hormuz exposure.

Third, the binding constraint differs by category of state and each category requires a different remedy. For the Gulf originators it is physical, comprising power, cooling and water, and the remedy is engineering and capital. For the Levantine transit states, it is political, comprising normalization, sanctions and governance, and no amount of capital substitutes. For the mandatory nodes it is competitive, comprising the erosion of rent by entry, and the remedy is pricing that neither Egypt nor its treasury can presently afford.

10. The hidden dynamics: four rivalries that determine which corridors are built

The preceding sections describe positions. This section describes the interactions among them. Four rivalries determine which of the announced corridors reach construction, and none of them is the rivalry that most commentary identifies as central.

10.1 The Gulf corridor race: United Arab Emirates against Saudi Arabia

Two monarchies with similar ambitions are pursuing them through incompatible models. Saudi Arabia acts as corridor architect: it seeks to set the framework, to route through states aligned with it, and to convert digital infrastructure into regional rule-setting authority. The United Arab Emirates acts as a global service provider: it builds first, remains carrier-neutral, and keeps itself open to every corridor including those it does not sponsor. Neither model is obviously superior, but they generate different perception of assets. Saudi Arabia's corridor model ties infrastructure development to explicit political conditions, whereas the Emirati approach creates open-access corridors in principle, with political expectations left unstated.

The competitive intensity is documented rather than inferred. WorldLink was announced ten days after SilkLink. Both terminate in Türkiye. Both are justified by the same Red Sea bypass logic and the same artificial intelligence demand thesis. Both are sized at approximately the same capital commitment. The implication is that route fragmentation is not a risk to be managed but an outcome that is already determined: **the Gulf will have at least two competing digital corridors to Europe by 2030, sponsored by two capitals that will not consolidate them.**

The analytically important consequence is that this fragmentation is efficient under the base demand scenario of section 7 and wasteful under the conservative one. If incremental demand is 300 to 500 Tbps, two corridors are required and the rivalry has produced, through competition, capacity that neither state would have built alone. If incremental demand is 80 to 120 Tbps, the rivalry has produced duplicative sunk assets across two politically fragile territories. The Gulf competition is therefore a bet on the demand scenario, taken by parties who have not stated it in those terms.

10.2 The normalization battle: Saudi Arabia against Israel

This is the master constraint of the system and the variable on which the largest number of other outcomes depend. IMEC was constructed on the premise of Saudi and Israeli normalization. That premise collapsed after October 2023. The Saudi response has not been to wait but to build an alternative that renders the premise unnecessary: the East to Med Corridor is being rerouted through Syria, and SilkLink bypasses Israel entirely.

The strategic content of this response should be stated plainly. If SilkLink succeeds, Saudi Arabia will have achieved the regional infrastructural position that normalization was supposed to deliver, without normalizing. Israel's entire transit role within IMEC evaporates, and with it the mechanism by which the corridor was intended to integrate Israel into the regional economy. The Crown Prince's public characterization of Israeli conduct in Gaza as genocide is not rhetorical decoration on a commercial decision; it is the political premise that makes an 800 million dollar sunk asset in Syria rational.

The general point is the one with which this paper began. **The selection of a fiber route has become a mechanism for expressing a position on the Palestinian question**. A corridor that runs through Haifa is a statement that normalization is expected; a corridor that runs through Tartus is a statement that it is not. Because these assets have 25 year lives and no salvage value, the statements are unusually credible, and that is precisely why they are being made in this form rather than in communiqués.

10.3 The excluded node: Türkiye and IMEC

Türkiye was deliberately excluded from IMEC for reasons that were coherent at the time: its Belt and Road-adjacent posture, its relations with Hamas, and its tensions within the Atlantic alliance made it unacceptable to the coalition of the United States, India and the Gulf. The exclusion has produced the opposite of its intended effect.

SilkLink, WorldLink and the Hejaz corridor all route through Türkiye. Türkiye is becoming the European exit for every overland corridor, whether that corridor is Western-aligned or not. Equinix Istanbul, Turkcell Superonline and DE-CIX will capture interconnection value irrespective of which corridor prevails. The conclusion is uncomfortable for the corridor's sponsors: Türkiye benefits most from IMEC's failure, since IMEC is the only proposed corridor that does not cross Anatolia while every alternative to it does. Excluding a state from a framework does not exclude it from the geography, and where geography is mandatory the exclusion transfers value to the excluded party.

10.4 China's shadow

China is present throughout the regional corridor competition and largely invisible in its public framing. Four positions illustrate the point. The Shanghai International Port Group operates the Bay Port terminal at Haifa under a twenty-five year lease, which places a Chinese state enterprise at the Mediterranean node of a corridor designed to exclude China. China Mobile participates in the 2Africa Pearl consortium alongside STC, Meta and Orange, and holds a stake in the India-Europe Xpress cable that transits Egypt. Belt and Road terrestrial routes run through Iran to Türkiye. HMN Technologies retains involvement in 13 cables across the region.

The United States response has been to promote WorldLink and IMEC as artificial intelligence ready alternatives that do not involve Chinese infrastructure, and to use interagency review to exclude Chinese suppliers from Western-aligned consortia. The cable route has consequently become a proxy theatre of United States and Chinese technology competition, but the proxy is imperfect. The India-Europe Xpress cable, an Indian flagship, has a Chinese state carrier among its owners and an American supplier. SEA-ME-WE 6, from which HMN Technologies was excluded, retains China Unicom as a consortium member. The system is not bifurcating cleanly; it is bifurcating at the level of suppliers and standards while remaining entangled at the level of ownership.

The consequence for Middle Eastern states is the narrowing predicted by Proposition 5. Regional governments fear Chinese data access but regard American access as an equivalent risk, and have therefore hosted both. That posture is sustainable while the great powers tolerate ambiguity. The systematic exclusion mechanism is the withdrawal of that tolerance, and the medium-term question for every state in section 9 is whether the price of continued ambiguity will exceed its value. The states best positioned to sustain it are those, like Oman, whose neutrality is itself the product they sell.

11. Scenarios to 2030

Three scenarios are offered with subjective probabilities. They are not forecasts. They are a structured statement of which combinations of the variables identified above are internally consistent, and the probabilities express a judgement about the relative likelihood of those combinations rather than the output of a model. Table 9 summarizes.

Table 9. Three scenarios for the Asia to Europe corridor system in 2030

Scenario	Probability	Configuration	Beneficiaries	Losers
1. Gulf corridor duopoly	40%	SilkLink and WorldLink are both complete. Israel is bypassed. Türkiye becomes the dominant European exit for Gulf data. IMEC is partially implemented through the UAE and India maritime and digital links, while the land corridor through Israel is abandoned or rerouted. The region has two competing overland fiber corridors, controlled respectively by Riyadh and Abu Dhabi.	Türkiye, UAE, Saudi Arabia, Iraq, Syria	Israel; India's land corridor ambition
2. Fragmentation and redundancy	40%	All corridors are partially built, and none is fully operational. SilkLink is delayed by Syrian governance fragility, WorldLink by Iraqi security, IMEC by Israeli and Iranian escalation. Türkiye benefits from every failure. The Red Sea and Egyptian route remains dominant for considerably longer than expected. The end state is a partial network that is resilient through redundancy but in which no single state captures the transit prize, with the exception of Egypt.	Türkiye, interconnection operators, cable suppliers	Any party that invested in a single route
3. IMEC revival through Lebanon	20 %	A Gaza ceasefire holds. Lebanese inclusion, covering Beirut and Tripoli, provides a political workaround that does not require Saudi and Israeli normalization, with French mediation succeeding. Haifa becomes one node rather than the primary one. The digital pillar advances independently of the political freeze on the land corridors.	India, European Union, France, Lebanon, UAE	China, which is excluded; Türkiye, whose leverage falls

Two observations about the distribution are necessary.

The first is that scenarios 1 and 2 carry equal probability and differ only in execution. Both assume that IMEC's Levantine segment fails. They diverge on whether the Gulf alternatives are delivered. That divergence turns on variables that are internal to Syria and Iraq, namely governance durability, security and contractor capacity, rather than on any decision taken in Riyadh, Abu Dhabi, Washington or Beijing. The most consequential uncertainty in the corridor competition therefore lies with the two weakest states in the sample, which is an uncomfortable conclusion for the sponsors who have committed capital to them.

The second is that the low probability assigned to scenario 3 should not be read as an assessment of its desirability. The Lebanese route variant is the single cheapest improvement available to IMEC, because it removes the corridor's dependence on a normalization that no party can currently deliver, and it does so without requiring any state to change its declared position. Its low probability reflects the fragility of its precondition, which is a durable ceasefire and Israeli withdrawal from the South, rather than any defect in its design. A corridor policy that took institutional design seriously would pursue it irrespective of the probability, since the option is cheap and the alternative is a corridor with no consortium and no route.

12. Conclusions and policy implications

The Asia to Middle East to Europe data corridors are the physical foundation of the emerging artificial intelligence and data center economy, and the existing submarine cable base is not sufficient to carry the demand that economy will generate. This is the first and simplest conclusion, and it reframes everything that follows: the corridor competition is not a contest for shares of a fixed volume of traffic but a race to build capacity that will, in the central scenario, be fully subscribed on delivery.

The second conclusion is that **these corridors carry political economy consequences that exceed their engineering significance.** The routes selected will determine the distribution of transit rents, the location of data center investment, the regulatory standards that regional states find cheapest to adopt, and the alignment structure of the region's digital economy for the design life of the assets. A twenty-five year cable is a twenty-five year political commitment, and it is being treated as such by the parties financing it.

The third conclusion concerns **rent and vulnerability, which are the same phenomenon observed from different sides**. Geographic position creates the opportunity for rent extraction, and Egypt is its present beneficiary as the mandatory node of the system. The same position creates concentrated vulnerability at the Suez crossing, the Bab al-Mandab and the Strait of Hormuz, where the probability of disruption is not low and the repair capacity is demonstrably inadequate at 63 vessels worldwide and 40 days per incident. States that collect corridor rent are purchasing that income with exposure they cannot hedge.

The fourth conclusion is that **the great power competition has changed form**. China led the development of both submarine and terrestrial corridors over the past decade through a bilateral, state-financed and vertically integrated model that converts announcements into assets. The United States seeks to counter that influence through IMEC, which distributes legitimacy across eight signatories but has produced no consortium, no secretariat and no cable. The contest is not between two systems of equal institutional capacity, and the deficiency on the Western side is one of contracting form rather than of capital or technology.

The fifth conclusion is that a **new class of land-based corridors is emerging in which Saudi Arabia, Iraq, Jordan and Syria become the new chokepoints**. This shifts the locus of corridor risk from maritime chokepoints, which are subject to naval and insurance remedies, to territorial ones, which are subject only to the political stability of the host. That is a materially different risk profile, and the financial instruments for pricing it do not yet exist.

The sixth conclusion concerns **the unrealized complementarity between Israeli technological capability and Gulf data center capacity**. The combination of Gulf capital, land and energy with Israeli talent, algorithms and Mediterranean cooling is the strongest configuration available in the region on purely economic criteria. **It is unavailable, and its unavailability is a direct function of Israeli regional policy in Palestine, Lebanon and Syria**. No commercial arrangement substitutes for the political condition.

The seventh and final conclusion follows from the six preceding. **Security and sovereignty considerations, not capacity, cost or latency, will determine the pace and the realization of these**

projects. This is an unusual finding in an infrastructure sector where unit economics normally dominate, and it is the principal contribution this paper offers.

12.1 Implications for host states

For mandatory transit states, of which Egypt is the only genuine instance, the strategic error to avoid is treating the corridor competition as zero-sum. Under the central demand scenario, bypass capacity is additive rather than substitutive, and a pricing policy calibrated to deter entry will lose volume that would otherwise have been retained. The Sinai crossing expansion is the correct response; the pricing policy is not, and reconciling the two requires a fiscal arrangement that decouples Telecom Egypt's transit receipts from immediate treasury needs. That is a public finance reform rather than a telecommunications one.

For emerging transit states, of which Iraq and Syria are the instances, the constraint is not capital, but the credibility of the security guarantee offered to a sunk asset. A corridor across a territory whose governance may not survive the construction period requires a risk allocation mechanism that neither project currently discloses. Sovereign guarantees, political risk insurance and phased milestone financing are the available instruments, and their absence from the announced structures is the single most informative fact about the seriousness of the two projects.

For neutral states, of which Oman is the exemplar, the finding is that neutrality is a productive asset with a measurable return, and that its value rises with the intensity of great power competition until the point at which exclusivity is demanded. The policy implication is to invest in the institutional credibility of that neutrality, through carrier-neutral facilities, sovereign cloud accreditation and non-exclusive landing regimes, rather than to attempt to convert it prematurely into alignment.

12.2 Implications for corridor sponsors

The IMEC signatories face a design problem, not a financing problem. A corridor with eight signatories, no secretariat and no cost allocation mechanism cannot contract with a consortium because there is no counterparty. The minimum viable remedy is a permanent coordinating body with budgetary authority and a mandate to allocate cost, which the Atlantic Council has identified and which the 2026 G20 is the natural forum to establish. Absent that, the corridor will continue to consist of capacity purchased on cables built by others.

The second recommendation follows from section 11. **The Lebanese route variant, and the Omani auxiliary node, are both cheap improvements that reduce the IMEC corridor's dependence on political conditions that no signatory can deliver**. A corridor whose critical path runs through the single most intractable political question, **the Israeli-Palestinian issue**, in the region should be redesigned so that it does not.

12.3 Implications for investors

Three observations conclude. First, **the supply chain is narrower than the ownership structure, and the four global cable manufacturers are a more concentrated exposure than the consortium tables suggest**. Second, **interconnection assets at mandatory geographic points, notably in Istanbul and**

at the Egyptian crossing, capture value under every scenario in Table 9 and are the only positions in this paper that do not require a view on which corridor prevails. Third, the physical constraints of section 8, **comprising power delivery lead times, water and cooling, are more likely than any political variable to determine whether the compute buildout that justifies the corridors is delivered.**

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