

Monthly Executive Briefing



secure Europe's submarine cables GSIS 2025 News:

Europe's submarine cable infrastructure faces a rising threat of sabotage. Governments and industry are responding by ramping up efforts to enhance resilience through additional networks, funding emergency repair capabilities and investing in surveillance tools. Most publicly listed submarine cables are owned and operated by is now confirmed private firms, while governments retain

responsibility for strategic continuity - making coordinated threat detection, response and repair essential. 1.5 million kilometres of submarine cables are vulnerable to accidental damage and

sabotage. Out of 22 reported global

disruptions in 2022-25, ten occurred in

Strengthening resilience to

Europe. The European Commission has reallocated EUR1 billion to fund new submarine cables and surveillance capabilities to aid detection and prevention. NATO initiatives like Baltic

- Sentry also seek to deter intentional cable damage. Long-term success of these predominantly privately owned networks depends on publicprivate partnerships to build resilience, including the expansion of the fleet of more than 80 cable-laying and repair vessels
- currently in service and investments in new cable routes. "We share a growing concern that undersea communications cables, subsea



The <u>agenda for the conference</u>

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"We want to make sure Europe is equipped not only to prevent and detect sabotage to cables but also to actively deter, repair and respond to any threat to critical infrastructure." Henna Virkkunen, Executive Vice-president of the European Commission for Technological Sovereignty, Security

resulted in potential internet or energy disruption in affected regions, delays in global data

and Democracy

G7 Foreign Ministers Declaration on Maritime Security and Prosperity, March 2025

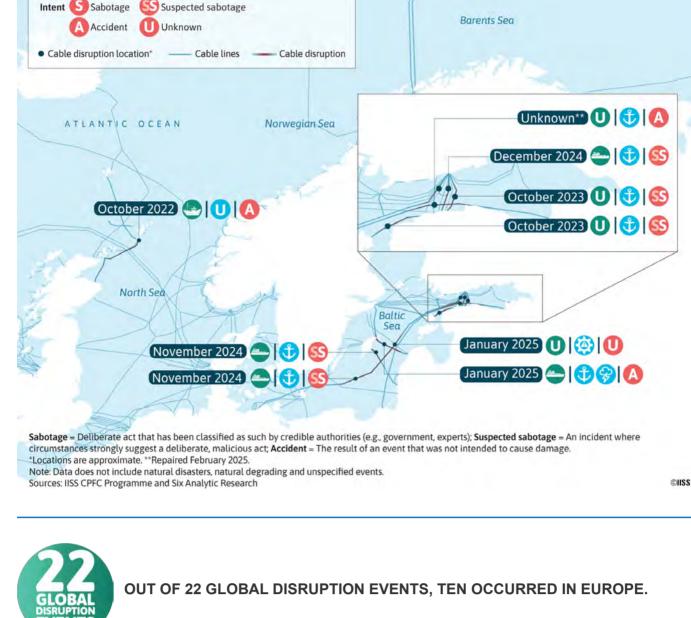
transmission, or compromised sensitive communications."

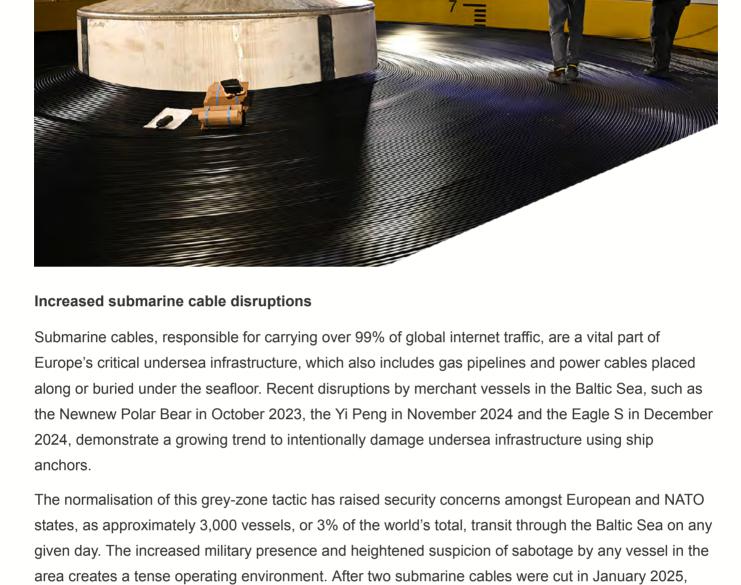
Global submarine cable disruptions (2022-25) ARCTIC OCEAN

Merchant vessel January 2022 🕒 🕕 🕔 Anchor Weather Unknown

Date of disruption Vessel involved Cause of disruption Intent

INDEX



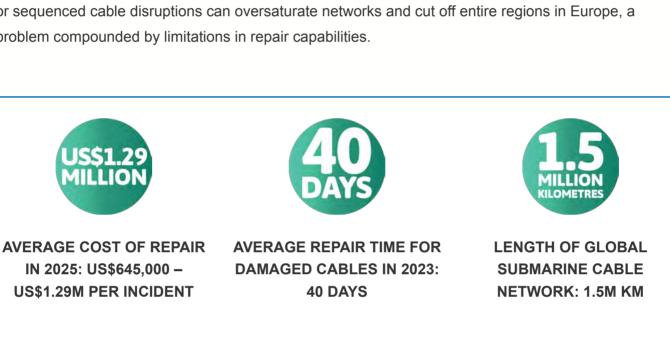


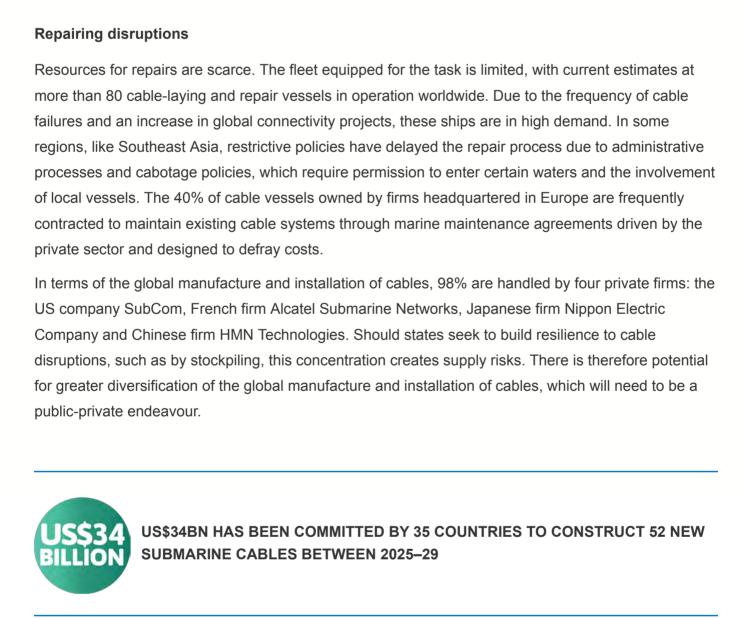
Bulgarian vessel. While both were suspected of involvement, they were subsequently cleared. In May

2025, as NATO forces sought to detain a sanctioned ship suspected of attempting to cut cables, a Russian jet was deployed to ensure its safe passage. More than 50 submarine cables connect countries surrounding the Baltic Sea, and while network redundancies ensure operations continue with minimal impact when a single cable fails, simultaneous or sequenced cable disruptions can oversaturate networks and cut off entire regions in Europe, a problem compounded by limitations in repair capabilities.

Norwegian authorities detained a Russian-crewed vessel, while Swedish authorities detained a

US\$1.29M PER INCIDENT





IN FEBRUARY 2025, THE EUROPEAN COMMISSION ANNOUNCED PLANS TO REDIRECT ALMOST EUR1BN INTO DIGITAL INFRASTRUCTURE, INCLUDING SUBMARINE CABLES AND SURVEILLANCE CAPABILITIES AMID GROWING



an outage.

Enhancing resilience and prevention

Efforts in Europe are under way to strengthen the resilience and redundancy of critical undersea infrastructure. In February 2025, as part of its EU Action Plan on Cable Security, the European Commission (EC) said it intends to redirect almost EUR1bn into digital infrastructure, including

EC, together with member states and industry partners, will support the development of new

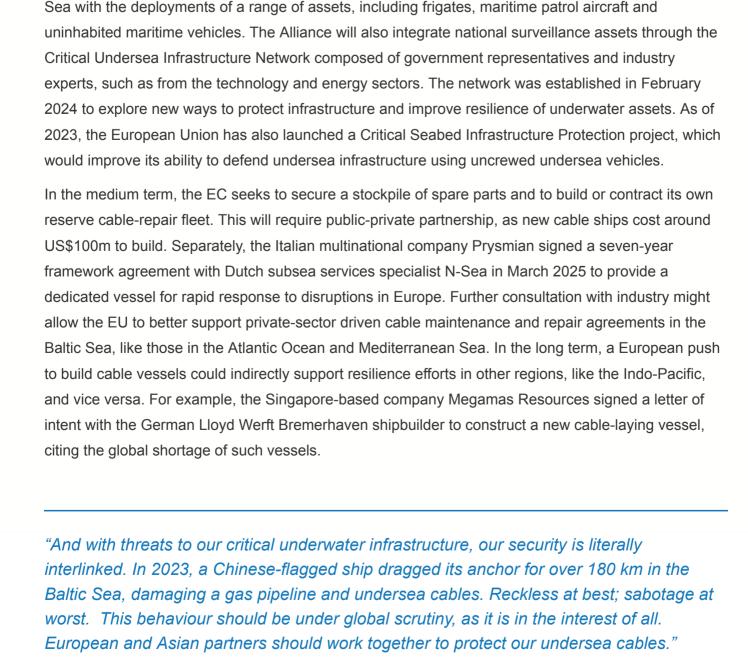
submarine cables and surveillance capabilities, amid concerns over recent Baltic Sea disruptions. The

surveillance tools and mechanisms to monitor the vast stretches of submarine cables and improve

threat response. Commercial sensors that can be placed along submarine cables or on the seabed – along with uninhabited air and subsea vehicles – can detect changes in vibration and temperature to monitor for physical cable damage, warn of potential acts of sabotage and deliver alerts in the event of

In January 2025, NATO launched the Baltic Sentry exercise to protect critical infrastructure in the Baltic

CONCERN OVER RECENT BALTIC SEA DISRUPTIONS.



owned infrastructure, submarine cables are critical infrastructure. European governments have signalled both strategic commitment and significant budgetary support, but the challenge lies in rapidly translating these commitments into operational capabilities and coordinated protection measures together with industry. Comprehensive cooperation between industry and EU and NATO members is critical to tackle existing stress points in the cable maintenance and repair process, which will enhance resilience. This coordination will, in turn, better inform investments and incentives aimed at shipbuilders for new cable ships, manufacturers for cable stockpiles, and research and development for advanced technologies. Enhancing the security and resilience of this infrastructure requires government backing,

but it will ultimately need to be a partnership delivered hand-in-hand with industry.

The protection of submarine cables is a shared security concern amongst industry and governments, creating avenues for increased public-private partnership. While disruptions primarily affect privately

Kaja Kallas, High Representative for Foreign Affairs and Security Policy and Vice-President of the EU Commission,

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Outlook

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