



**TLN**

**TRANSATLANTIC  
LEADERSHIP  
NETWORK**



**JOHNS HOPKINS**  
SCHOOL of ADVANCED  
INTERNATIONAL STUDIES

# The Digital Drivers of the Pan-Atlantic Economy

Daniel S. Hamilton

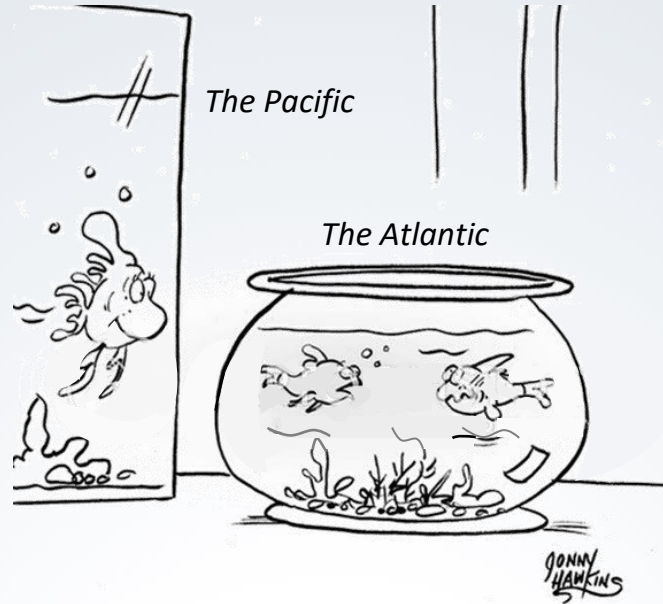
*President, Transatlantic Leadership Network*

*Senior Fellow, Johns Hopkins University SAIS Foreign Policy Institute*



**Does the Atlantic Matter?**

# The Atlantic gets no respect.



**“Let me guess ... you’re seeing someone else!”**

**No respect.**



# Western Hemisphere



# Eastern Hemisphere





# Legacies of the First Atlantic World

## Colonialism, Slavery, Differing Linguistic Spheres







**Northern Hemisphere**

**Southern Hemisphere**



# If there is an Asian Hemisphere...



# ...then there is an Atlantic Hemisphere



# Globalization Is How Continents Connect



*“The real voyage of discovery consists not in seeking new landscapes, but in having new eyes.”*

Marcel Proust

# New Eyes for the Pan-Atlantic



# Flows ...

- The **world's busiest ocean**.
- The pan-Atlantic **digital seaway is the busiest in the world**.
- **Goods flows rival those of the Pacific**.
- **Flows of services, investment and digital commerce exceed those of the Pacific**.





# Resources ...

- **A central energy reservoir for the world**; redrawing global maps for oil, gas, renewables & clean tech innovation.
- Home to the **world's richest fishing resources**.
- Home to **3 of the world's 4 major carbon reservoirs**.
- Locus of the **world's thermohaline circulation pattern of currents** that reduces extremes in the planet's climate.



# Strategic ...

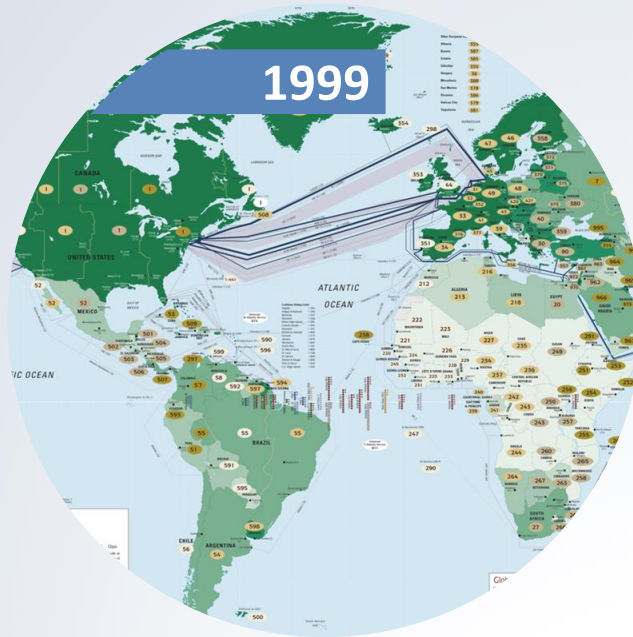
- **De-risking, off-shoring, outsourcing & near-shoring strategies** are boosting the Atlantic.
- The inland sea to the **vast majority of the world's democratic countries.**
- Leads the **world in "blue growth" strategies.**





***There is a lot going on  
in the Atlantic!***

# Digital connectivity: the leading driver of Atlantic convergence



Source:  
Teleography

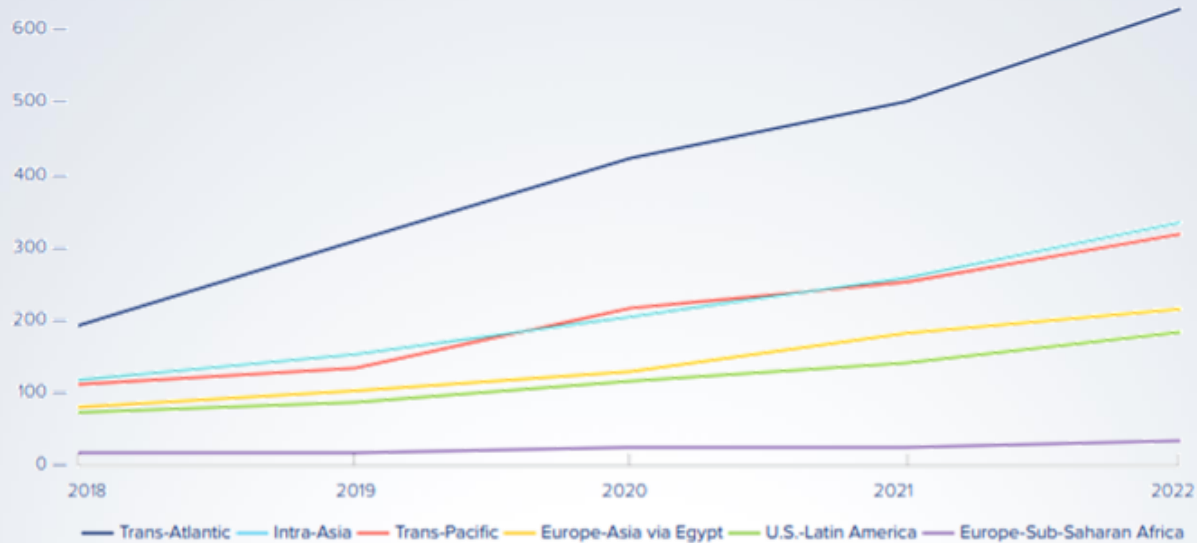
Atlantic data seaways, already the busiest in the world, are building out fast –  
**Not just North-North, but increasingly North-South and soon South-South**





# Digital connectivity: the leading driver of Atlantic convergence

Lit Submarine Cable Supply by Route (Lt Capacity, Tbps)

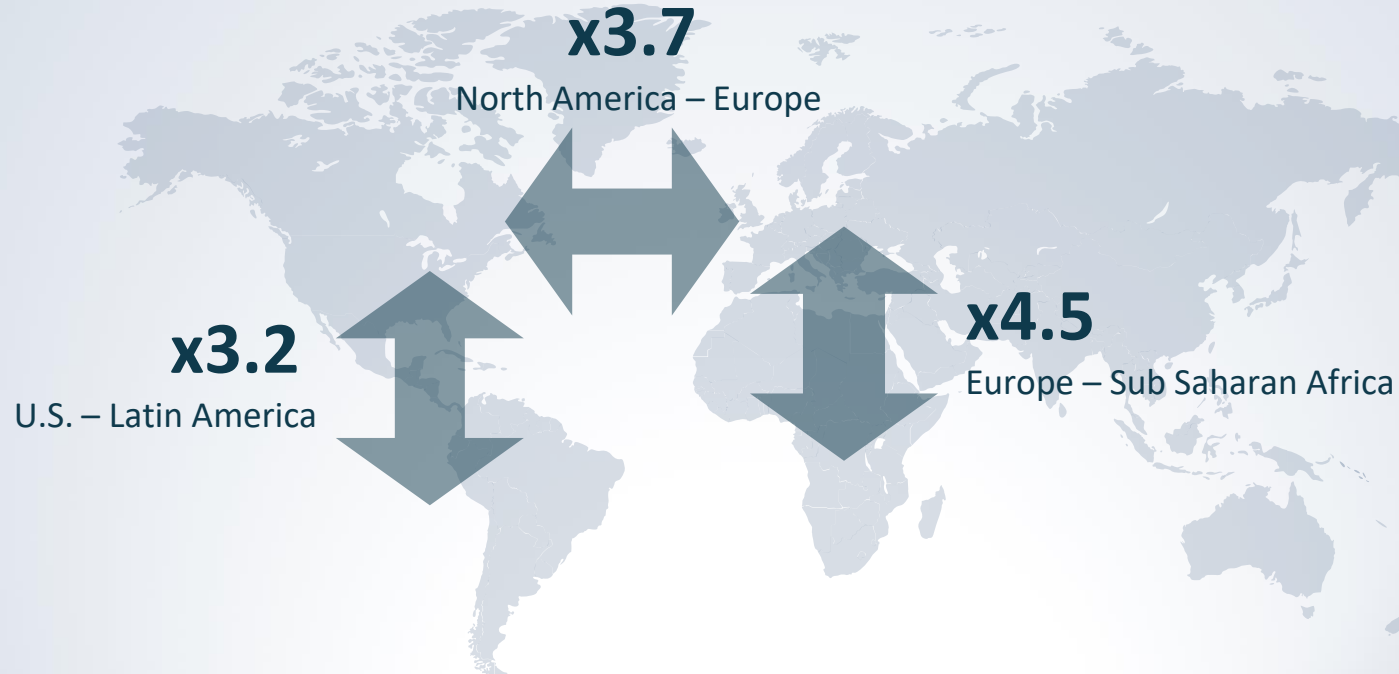


*Lit capacity means the amount of capacity actually running over a cable. Trans-Atlantic capacity refers to the North Atlantic. Trans-Pacific capacity refers to the North Pacific. Intra-Asian capacity only includes cables with landings in both Hong Kong and Japan.*

*Source: Telegeography, "Transport Networks Forecast Service," 2023.*

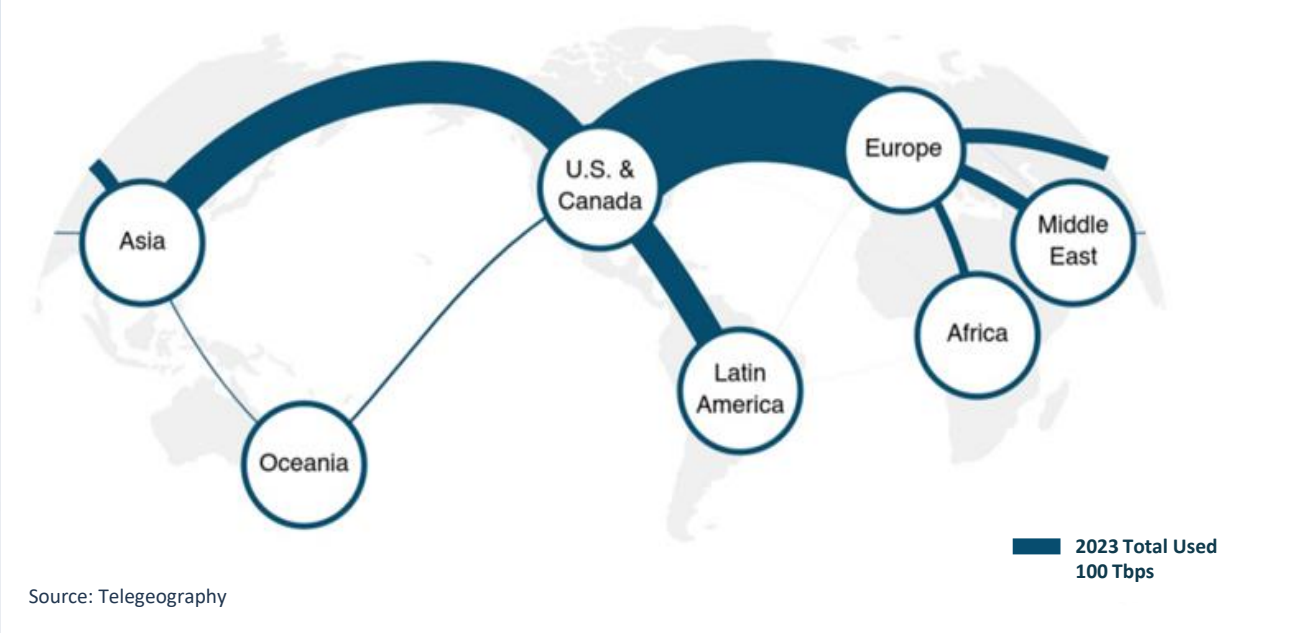
# Digital connectivity: the leading driver of Atlantic convergence

Capacity Usage Growth 2019-2022



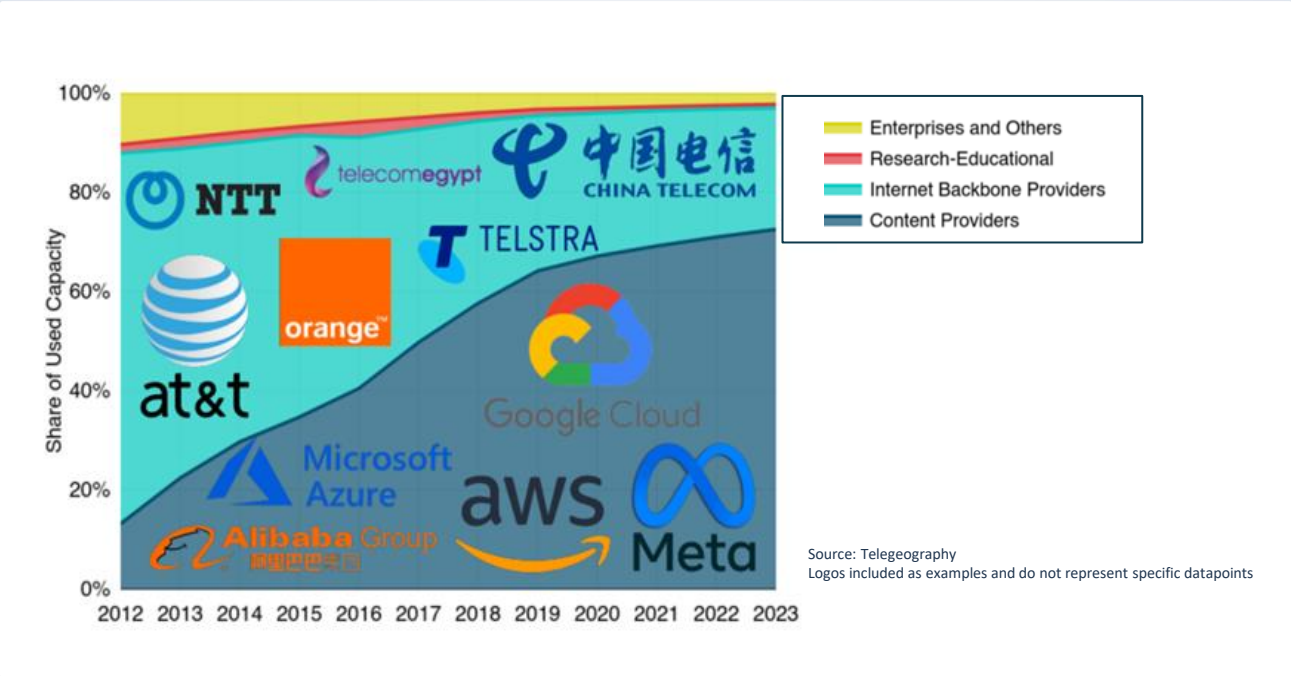
# Digital connectivity: the leading driver of Atlantic convergence

Used Inter-Regional Bandwidth, 2023



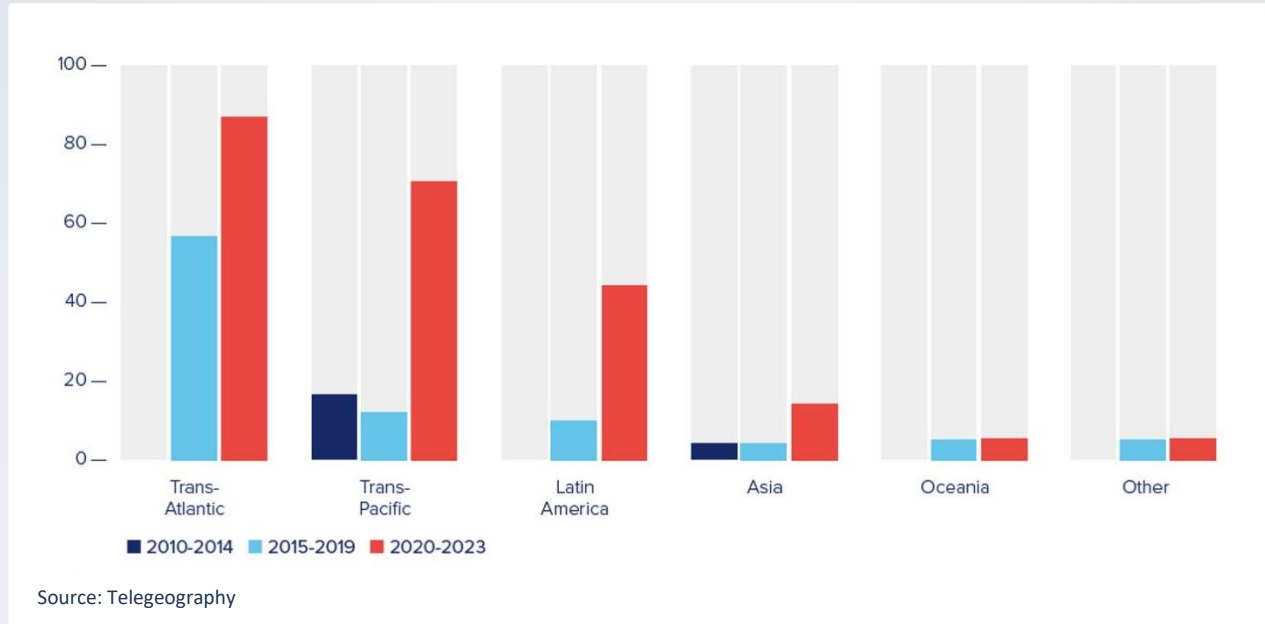
# Digital connectivity: the leading driver of Atlantic convergence

Used international Bandwidth by source, 2012-2023



# Digital connectivity: the leading driver of Atlantic convergence

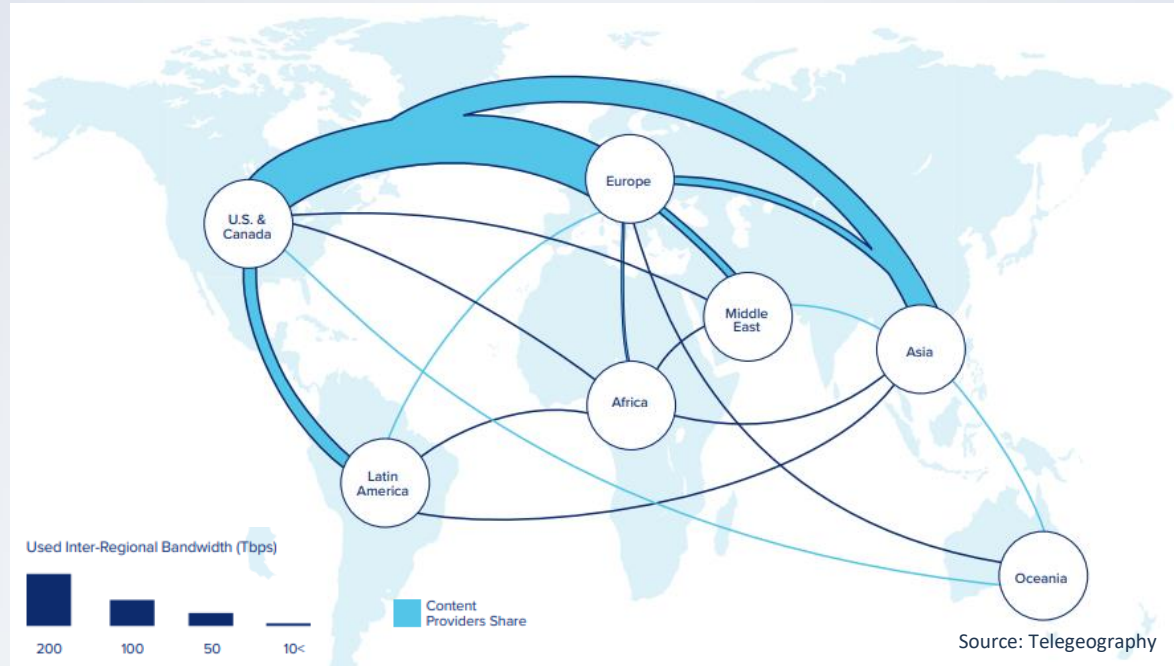
Content Provider Investments Share as % of CAPEX on New Submarine Cables





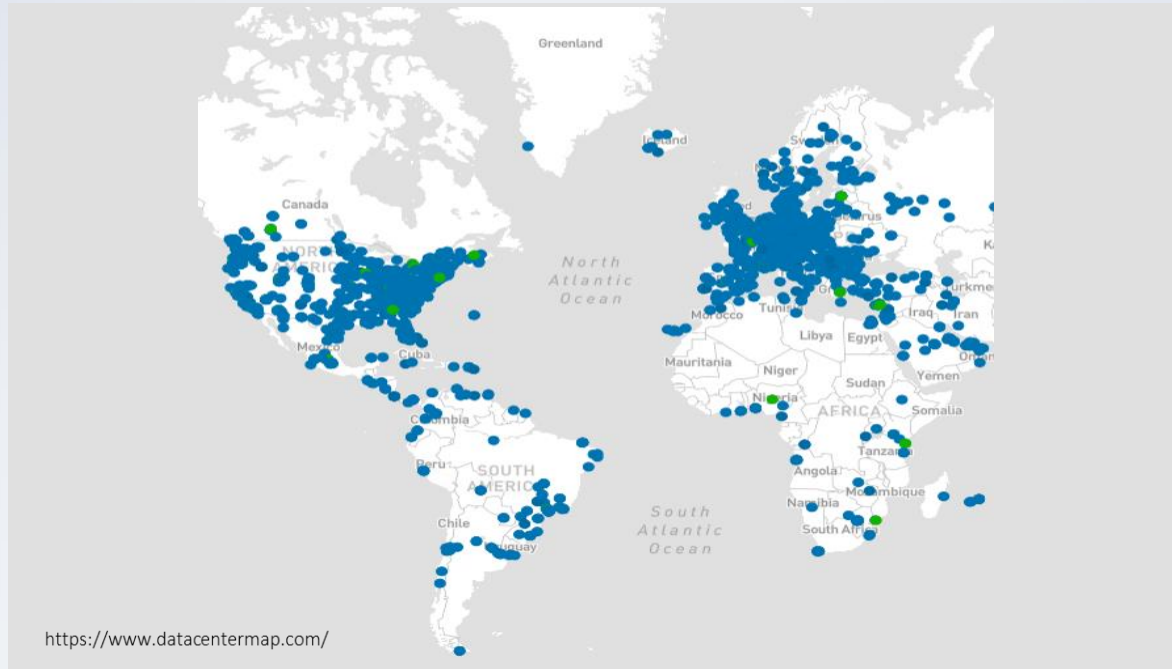
# Digital connectivity: the leading driver of Atlantic convergence

Inter-Regional Capacity and the Cloud – Used Inter Regional Bandwidth (Tbps)



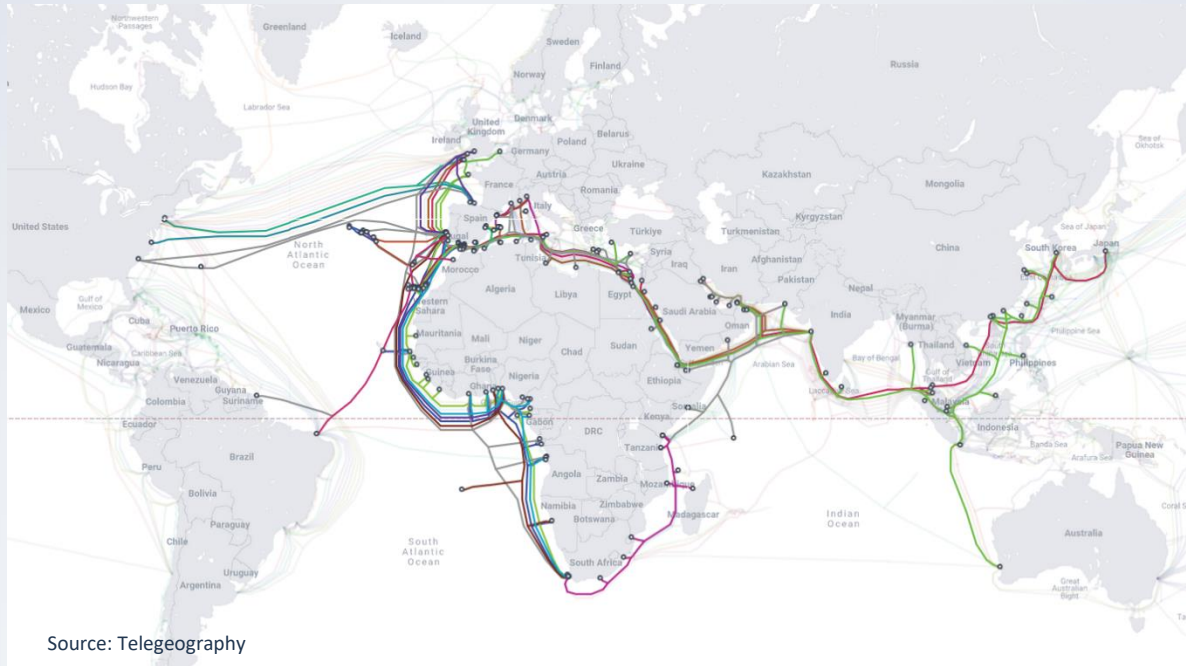
# Digital connectivity: the leading driver of Atlantic convergence

## Atlantic Data Center landscape



# Digital connectivity: the leading driver of Atlantic convergence

## Zoom on the Iberian Peninsula





***BUT the Atlantic is also facing  
serious concerns***



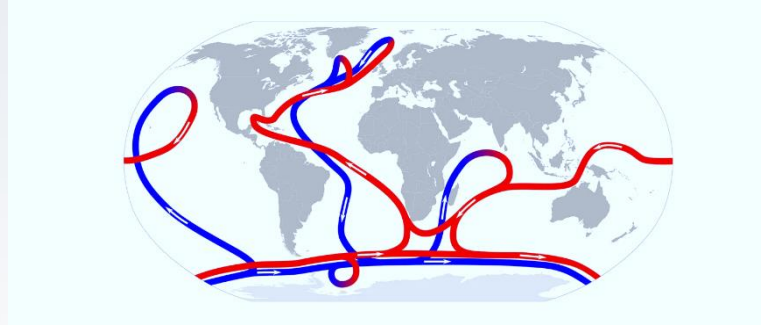


# The Atlantic Convergence is threatened

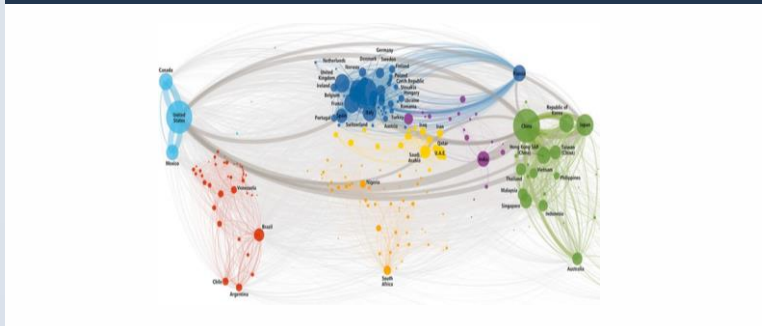
Dangerous pan-Atlantic networks of guns, drugs, crime, terror



Changing ocean currents threatening the Gulf Stream & the planet's climate



Disruption of critical economic, environmental, technological, human flows



Illegal, unreported, and unregulated (IUU) fishing



# The Atlantic Convergence is threatened

Dangerous pan-Atlantic networks of guns, drugs, crime, terror

Changing ocean currents threatening the Gulf Stream & the planet's climate



And there are  
no Pan-Atlantic  
response networks

Disruption of critical economic, environmental, technological, human flows

Illegal, unreported, and unregulated (IUU) fishing



2.28 ±0.04  
World overall 2023  
IUU score



# Atlantic Convergence Is Highly Uneven



**Thick North Atlantic connections; thin South Atlantic connections**

**A region of extreme wealth & poverty**

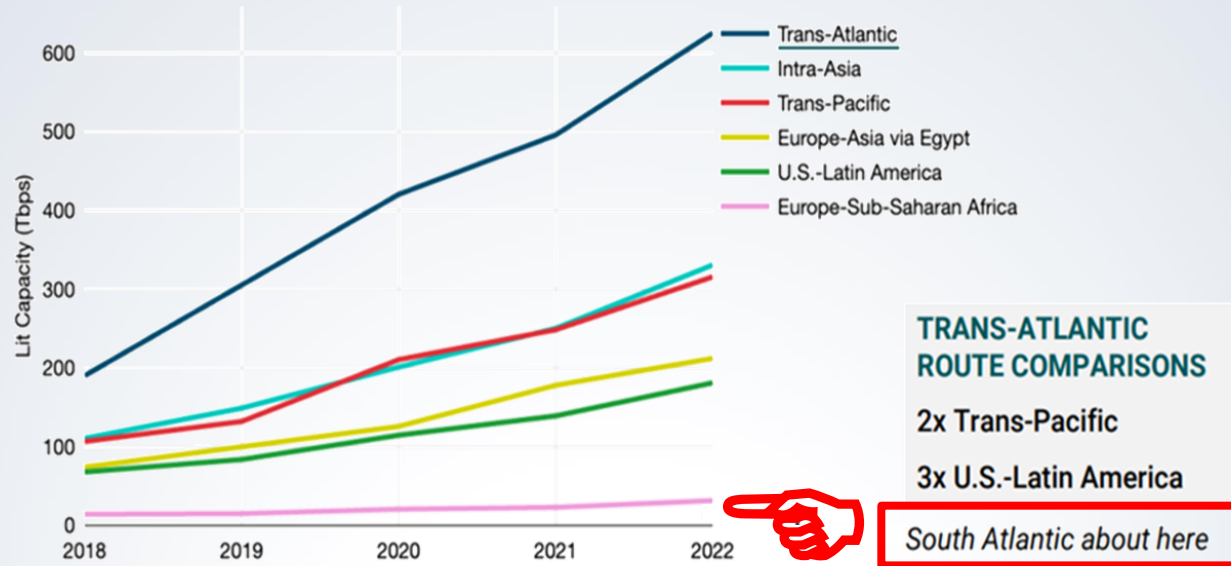
**Energy riches yet millions lack access**

**Dense digital connections yet millions lack access**



# THICK NORTHERN CONNECTIONS; THIN SOUTHERN CONNECTIONS

Lit Submarine Cable Supply by Route, 2018-2021

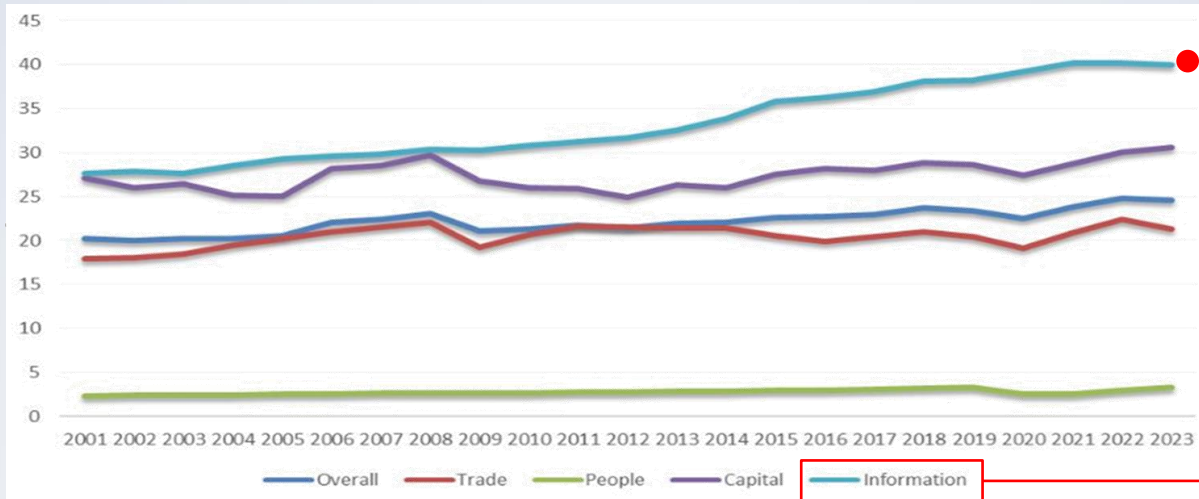


Source: Telegeography

A glowing Earth with city lights at night, viewed from space. The planet is centered in the frame, showing the Americas and parts of Europe and Africa. The lights are concentrated in the eastern United States and along the coastlines. The Earth is surrounded by a bright, glowing aura.

***An ocean of opportunities***

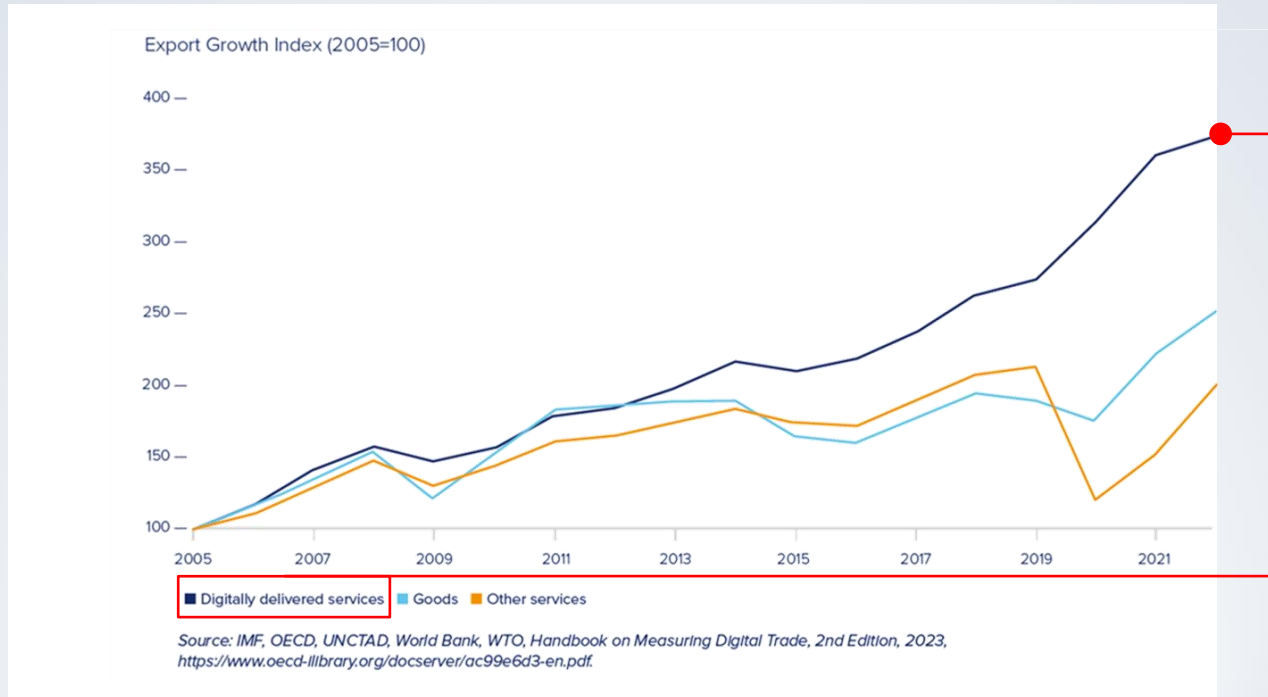
# Information Flows Are Outpacing All Others



Source: Altman, Steven A. and Caroline R. Bastian. DHL Global Connectedness Report 2024. Bonn: DHL Group. DOI:10.58153/7jt4h-p0738



# Digitally Delivered Services Are The Fastest Growing Segment of International Trade



# Build New Pan-Atlantic Networks – Digital Port Cities

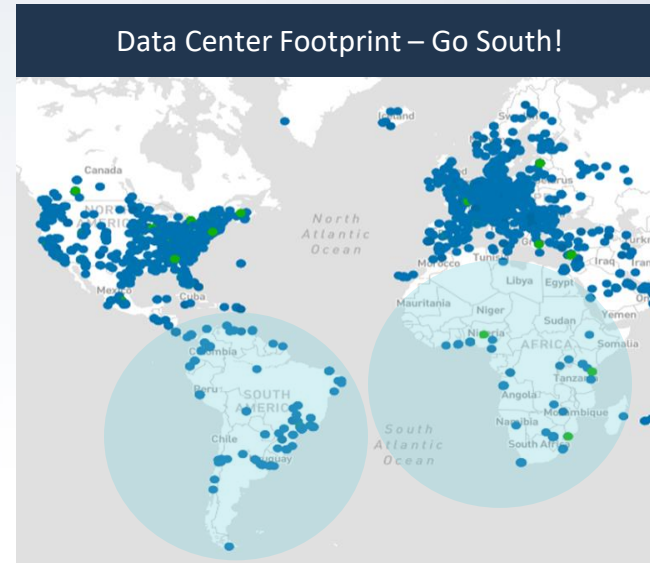
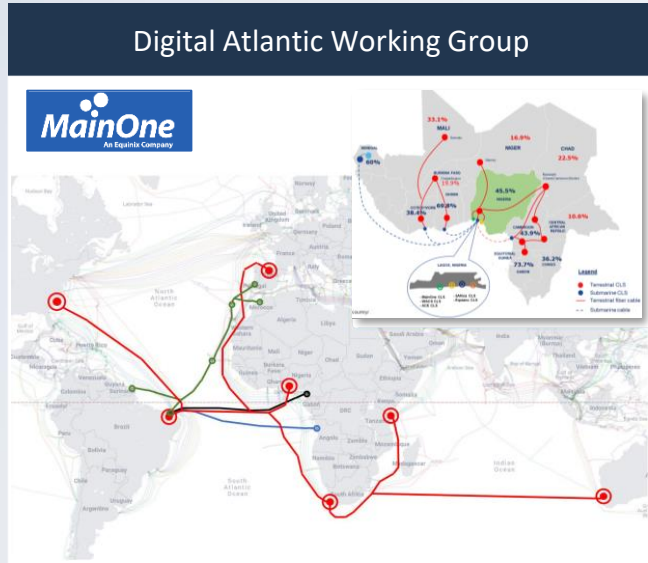
## Examples





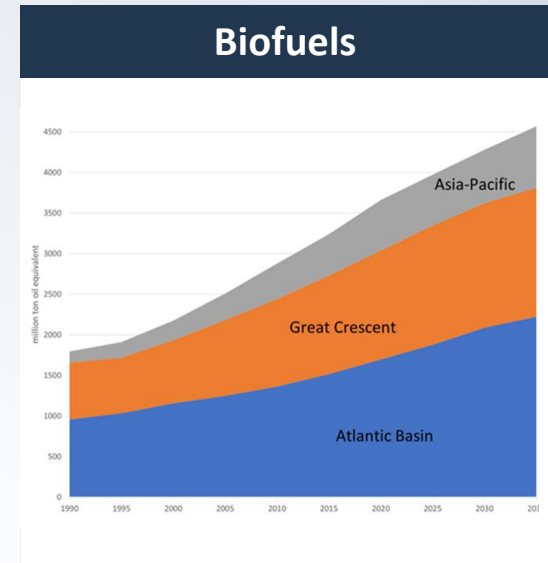
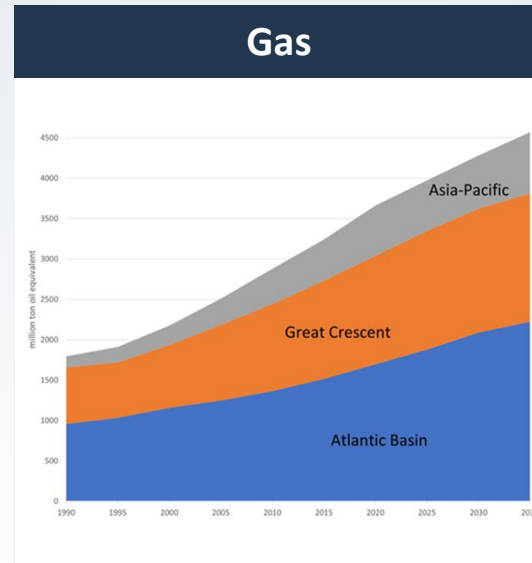
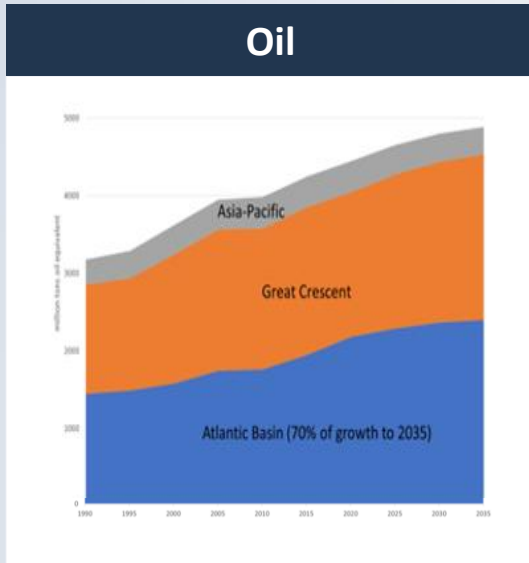
# Build New Pan-Atlantic Networks – Fill in the Gaps

## Examples



# Build Synergies With The Energy Transition

Global Production, Past & Future to 2025 – re-mapped by major regions



***The Atlantic Is Recasting the Global Energy Future***

# Partnership for Atlantic Cooperation (PAC)

- 40+ Atlantic governments
- Collaboration among Atlantic countries, initially on **maritime** domain awareness, countering illegal fishing, **environmental** degradation, and the ocean **sciences**.
- Starting cautiously. Need for **private-public cooperation on common issues**.
- Help governments **understand the Digital Atlantic's opportunities & challenges**.







**Key take away**

# Atlantic Convergence Depends on Digital Transformation

## Better digital connectivity...

- **holds promise for the two billion people** in the Atlantic Hemisphere without regular access to the internet or to reliable energy
- **can power trade, especially digitally deliverable services**
  - the fastest growing segment of international trade
- **can improve marine spatial planning & maritime information systems**
  - two priority areas for Atlantic governments
- will both **drive & benefit from the Atlantic Energy Renaissance**
- can **address illegal, unregulated and unreported fishing** activities
- **can help mitigate human security threats**
  - terrorism, piracy, trafficking in guns, drugs, and human beings



The background of the image is a vast, deep blue ocean with gentle ripples on the surface. The horizon line is visible in the lower third of the frame. Above the horizon, the sky is a clear, vibrant blue, with a bright sun in the upper left quadrant. The sun's rays are visible, creating a lens flare effect that spreads across the sky. The overall scene is bright and open, suggesting a sense of vastness and potential.

# **The Pan-Atlantic is Globalization's Next Frontier**

**The South Atlantic  
Is Its Horizon**

A white double-headed arrow is positioned horizontally across the middle of the image, pointing both left and right. It is centered vertically between the two lines of text in the lower section. The arrow's ends are slightly curved, and it has a thin, clean white line.



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