



Disruptive Analysis

Don't Assume



Interconnection will need Orchestration

Opportunities and Challenges in a Complex, Multi-Network Future

Dean Buble, Dublin, 20 October 2026, WAS 24, hosted by Cellusys

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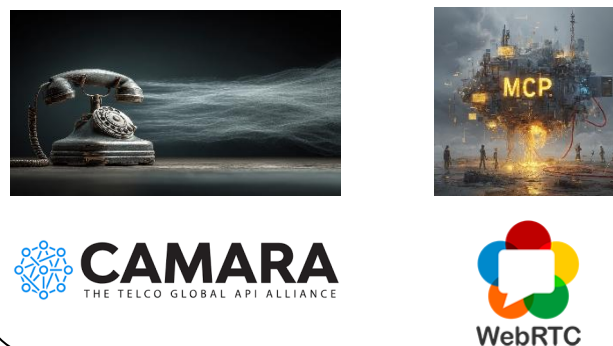


Dean Bublely & Disruptive Analysis

- Tech/telecom analyst & strategic consulting since 1991
- Advisor to telcos, regulators, vendors, investors, government
- Private advisory projects, workshops & public speaking
- Futurism, Forecasting, Anti-Forecasting, Policy
- Convener of “Unthinkable Labs” on Telecom AI, Sovereignty etc



Network Tech, Policy & Business Models



AI Voice, Cloud / Edge, APIs & Telco services



Geopolitics, Post-Digital, AI & Telecom-Futurism



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Why I'm not always popular with the MNO "establishment"



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**Rich Communications Suite:
Why IMS RCS will fail – and how to salvage it**

A Disruptive Analysis *thought-leadership* paper

September 2010

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October 2026



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RCS is a Zombie Technology, 28 Quarters Later



Dean Bubley

Tech, Telecom & AI Analyst & Futurist | Influential advisor with 25yrs+ in Telecoms Strategy, 5G / 6G / Wi-Fi, FTTX, Cloud / AI, Spectrum,...



May 7, 2015

2015

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The 12 Lies of Telecoms Xmas



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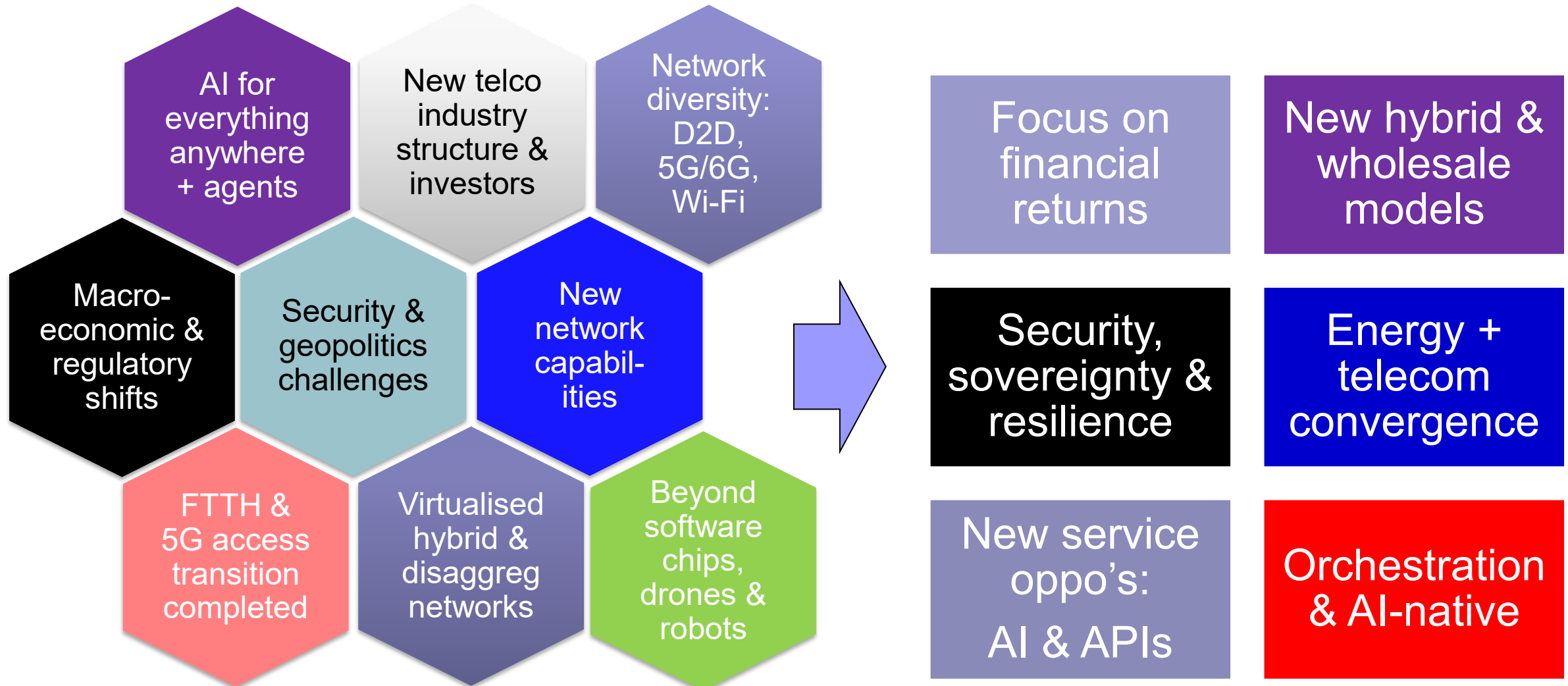


December 19, 2023

2023

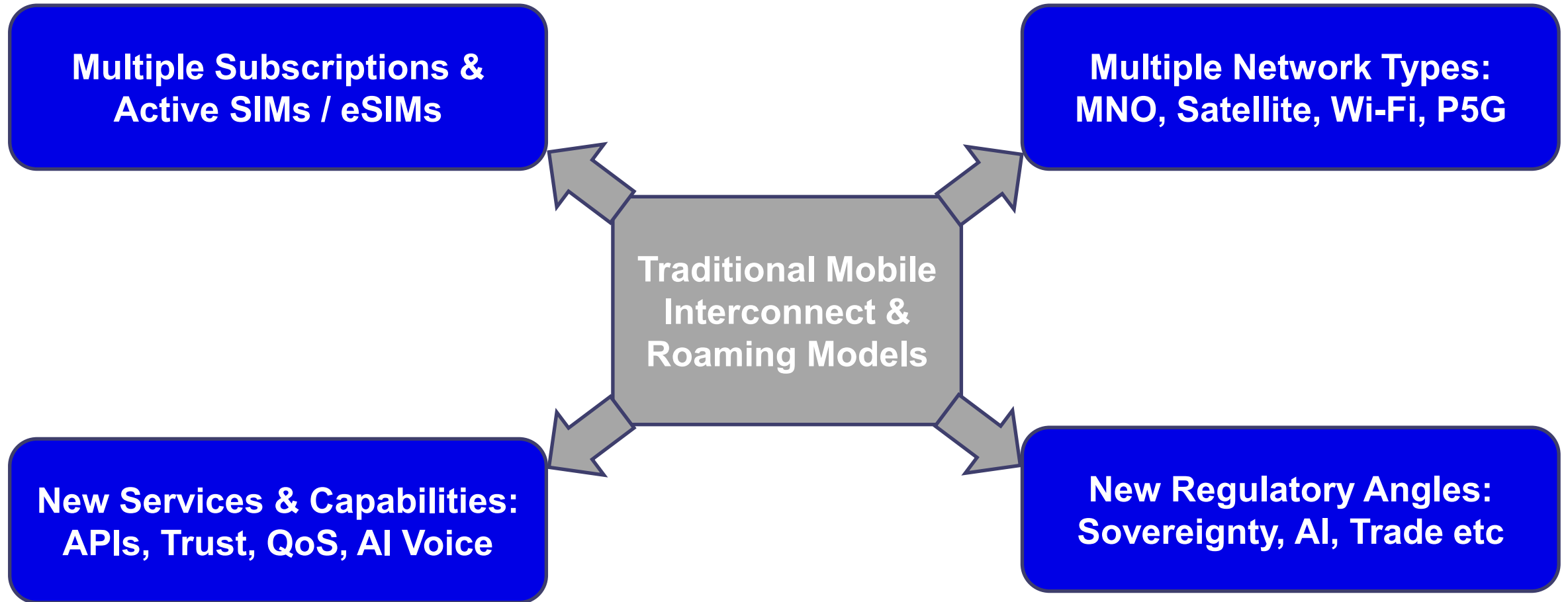


Broad telecoms trends in 2027+ mapping to future realities





Mobile interconnection is getting **much** more complex



Multi-dimensional complexity typically needs “Orchestration”, not just deals & platforms



Provocation: How many eSIMs will you have?

Main MNO

**Try-before-
buy MNO**

**Employer
MNO**

Travel eSIM

**Satellite
eSIM**

**Private 5G
eSIM**

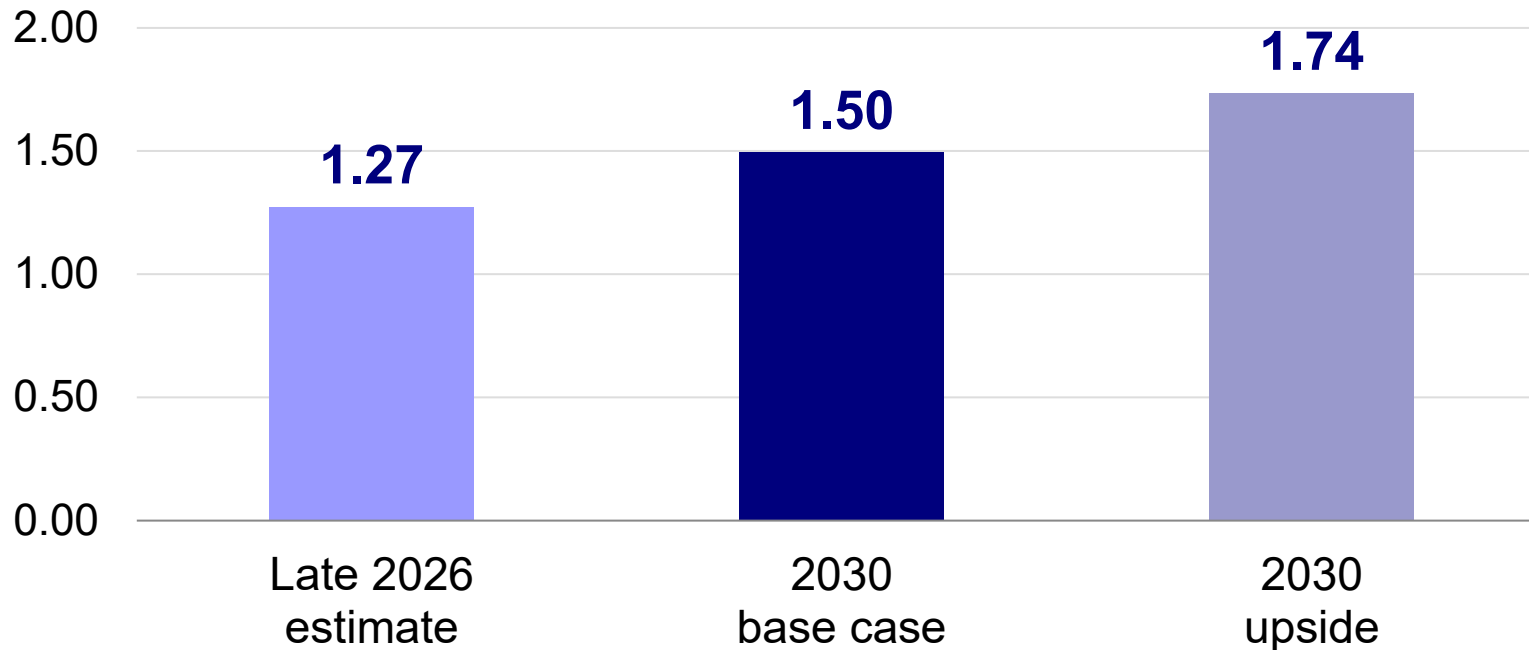
**App-specific
eSIM**

**Backup MNO
eSIM**



What happens when users have 1.5 or 2+ eSIMs each?

1st-cut rough estimate: service-live SIM / eSIM profiles per active smartphone



39%

with 2+ live profiles
in 2030 base case

**What happens with
Dual-SIM Dual-Active
phones?**

Source: Disruptive Analysis estimates, ChatGPT 6 Astra



And SIMs / eSIMs are not the only network identities...

**SIM / eSIM
profiles**



VPN profile

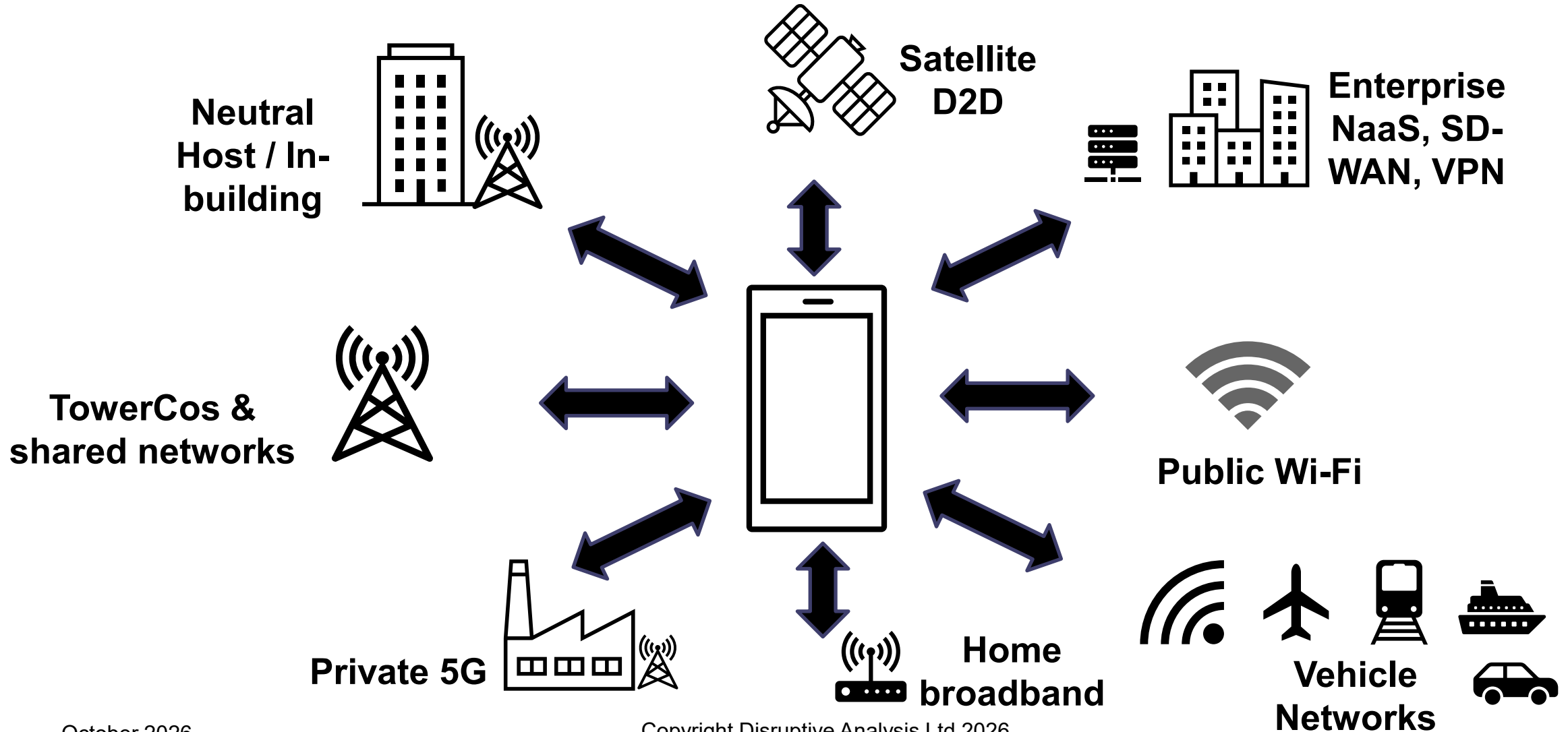
**Home, work,
other Wi-Fi**

**MSS satellite
entitlement**

**MAC
address**

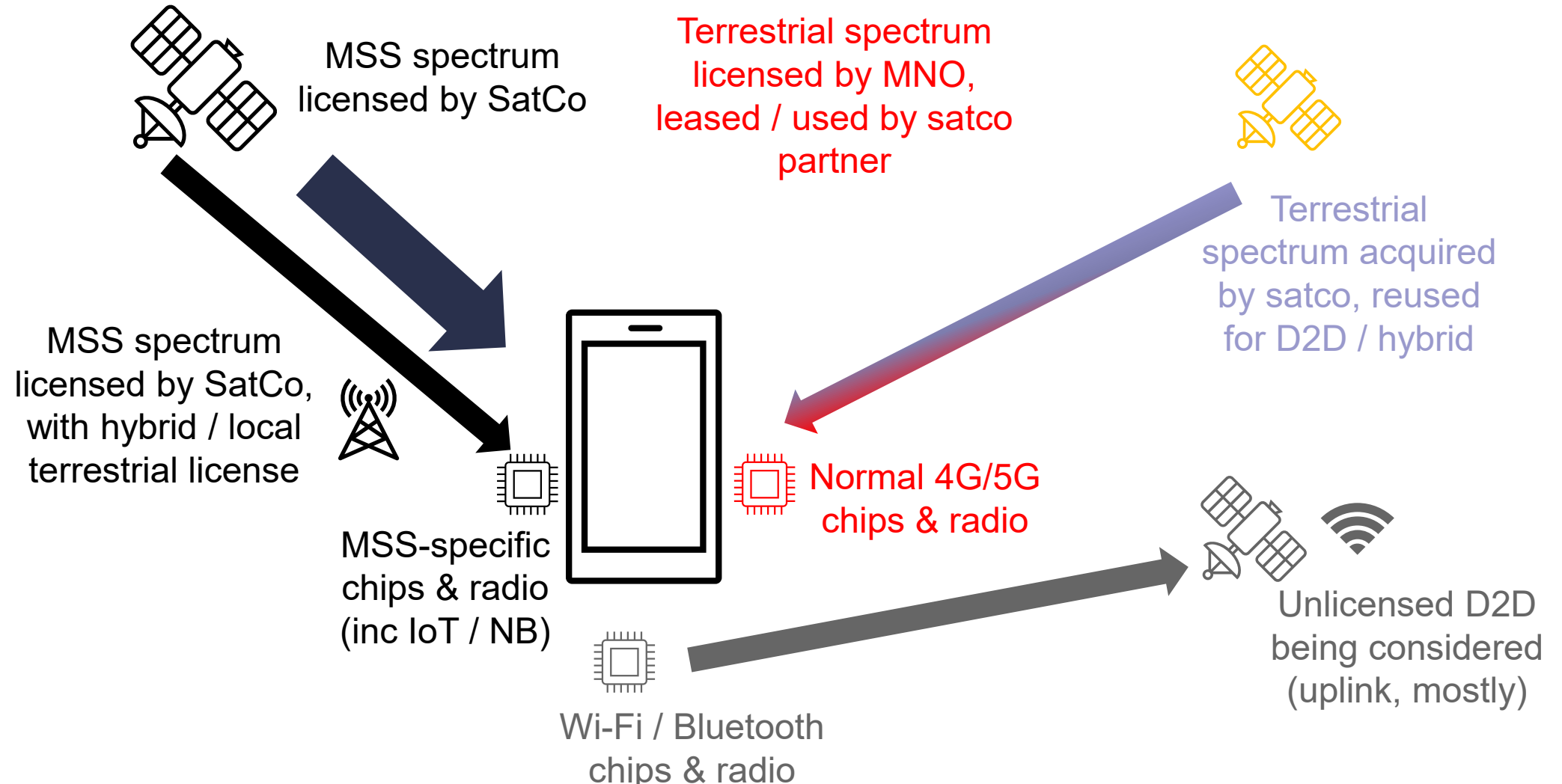


Many more wireless networks & services to interconnect



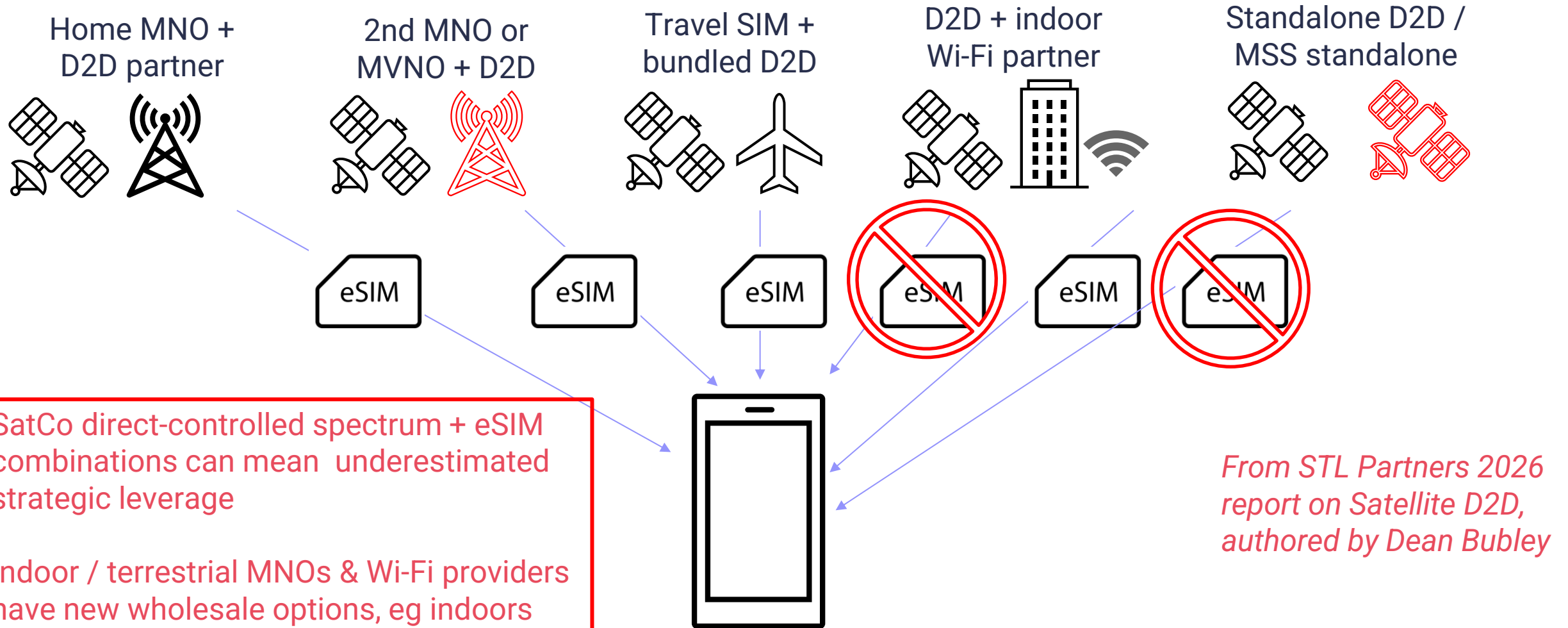


Spectrum options help drive D2D & interconnection models





Wholesale disruption: the role of D2D eSIM & non-SIM





Partial churn changes wholesale economics

What operators lose	What wholesalers can gain
Roaming data & retail margin	Supply to secondary eSIM providers
Complete view of the user	Resilience & niche coverage premium
Control of network selection	Profile selection & lifecycle support
Basic metrics, eg minutes, GB, texts	Network API aggregation / abstraction
Straightforward bilateral deals	More complex, orchestrated value
National MNOs as basic building-block	New networks eg satellite, Wi-Fi. Some non-SIM
Slow-moving Zombie services (eg RCS)	Innovation around AI, voice, devices etc



New services & capabilities offer interconnect opportunities



Network
Quality / NaaS



Anti-fraud API
signals



Sovereignty



AR / XR



Conversation
records / vCon



Agent identity



Sensing

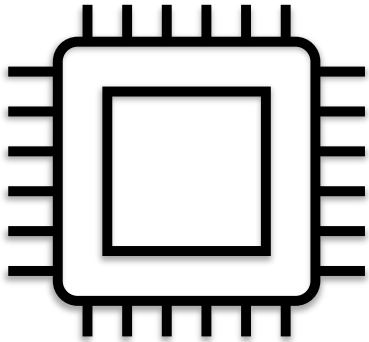


AI Voice

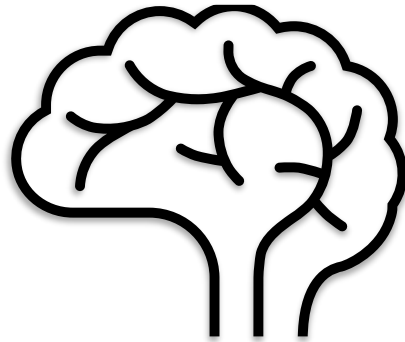
Also spectrum...



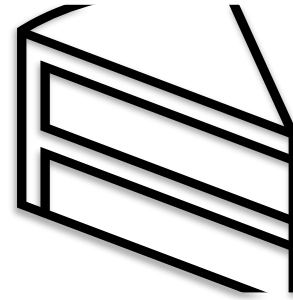
...but these? Not so much....



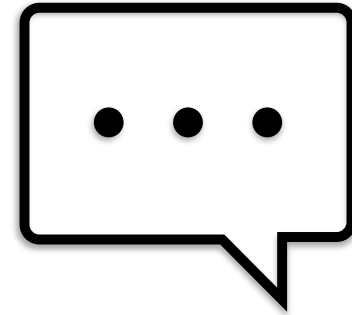
MEC Edge
Compute



AI Tokens



Network slicing



RCS
(debatable!)

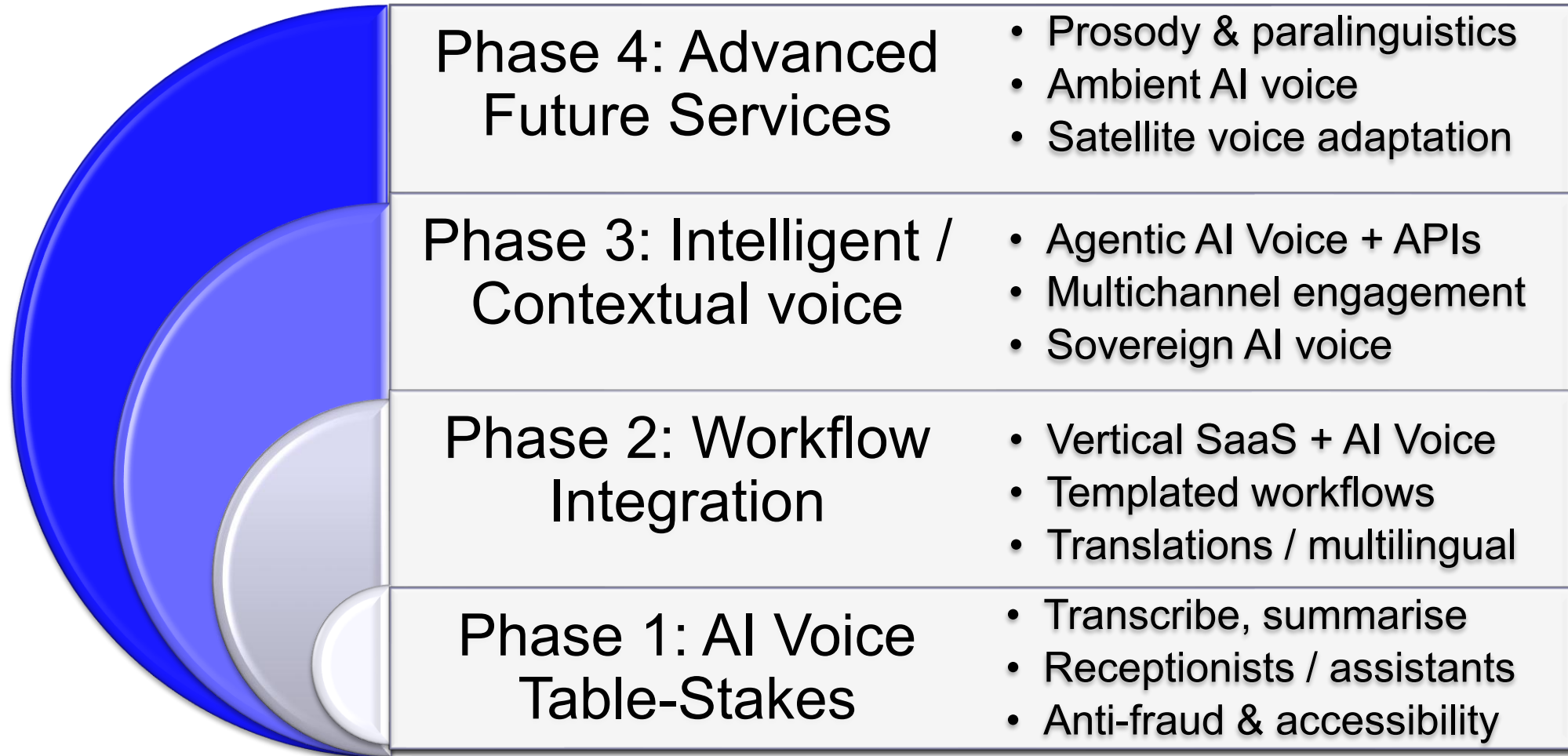


QoS and QoE cross different boundaries

What the customer wants	What a provider can influence	Wholesale challenges
Predictable radio performance	Scheduling, admission and congestion handling	Roaming, other access networks or a changed SIM
Reliable transport to an endpoint	An agreed managed path and egress	Inter-operator and public Internet paths and external VPNs
Fast application response	Some network delay and loss	Server queues, wholesale links, model compute and app design
An acceptable user experience	Measured service outcomes	Device load, codecs, user context and failures

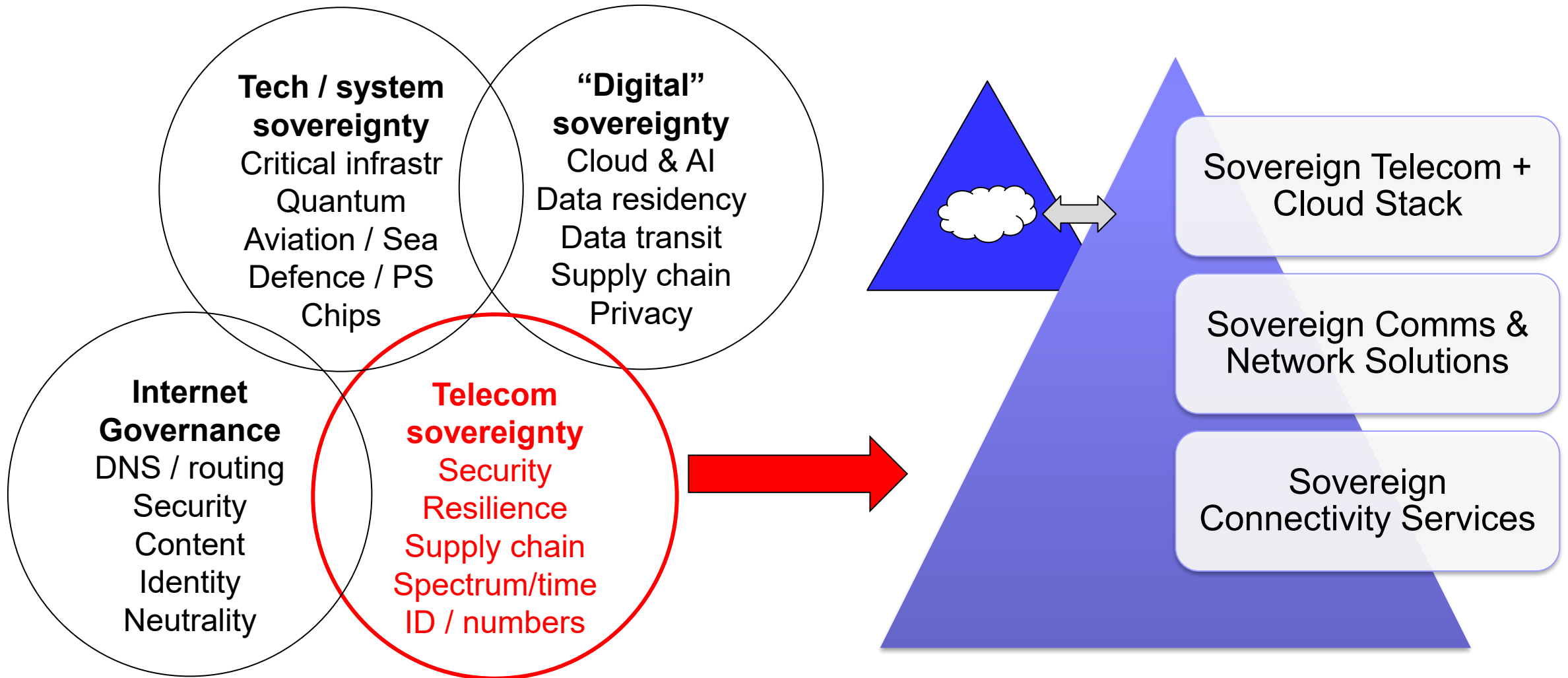


AI Voice will be another challenge for interconnect





Telecom sovereignty will impact wholesale in many ways





Uncomfortable but plausible geopolitical scenarios

“Our citizens may not roam onto networks using Vendor X cores”

“Satellite D2D access in country X needs to go via gateways in country Y”

“All international calls must flag any AI used for translation & transcription”

“The trade deal means you need to open 6GHz spectrum to Wi-Fi”

“You need to prohibit roaming SIMs from being used in drones”

One of these is already real. Contact Dean Bublely to discuss!



Many integrations, requirements & enablers for interconnect

Roaming	MVNO deals	Travel SIMs	Neutral hosts	New MNO types
5G / 6G features	Wi-Fi	Satellite D2D	Private 5G	Network APIs
New telco regulation	Trade policy	Sovereignty	Privacy & consent	AI & voice regulation

Requirement for Interconnection Orchestration



The “Four Orchestras” Problem for networks, services & AI

Network Resource Orchestration

5G / 6G core, AI-RAN,
dynamic spectrum,
NaaS, capacity, energy



IT / OSS / BSS Orchestration

Interconnect & wholesale
charging & billing, Agentic
CX, AIOps, assurance,
intent, delivery, revenues



Compute/Workload AI Orchestration

GPUs / xPUs, models,
data, agents, scale, edge,
latency, governance



Services & Comms Orchestration

Voice, Conversations,
Experiences, Consent,
Context, Outcomes,
Numbers, Regulation



Is “Interconnect Orchestration” another separate domain, or embedded in all of these?



Conclusion: Interconnect & wholesale needs (r)evolution

- Multiple underlying assumptions changing simultaneously
- Users (and applications) will use diverse networks & paths
- Interconnect will need more awareness of:
 - Connection layers & concurrency
 - Application-level requirements & features
 - Complex multi-party interactions
 - New & changing regulatory dynamics

This will require orchestration, not just deal-making



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& speaker with 25yrs+ in Telecoms Strategy, 5G /...

