

Case Study

Building the Case for Enhanced Connectivity

Strategic Options and Market Engagement for the Falkland Islands Government

"Cambridge MC's structured market engagement gave us practical insight into what potential providers can really deliver, helping us shape a procurement and regulatory approach that is attractive to the market and protects the long-term interests of the islands."

**Becky Clark, Director of Development and Commercial Services,
Falkland Islands Government.**

Overview

As the exclusive license with its existing incumbent provider of telecommunications services is now at the point where giving of notice can be considered, the Falkland Islands Government is looking to maximise this opportunity to refresh the digital infrastructure on the Islands, bringing improved community satisfaction and socioeconomic growth to its residents.

As such, the Falkland Islands Government engaged Cambridge Management Consulting as its official provider of telecommunications consulting. We were asked to provide a set of strategic recommendations designed to create a roadmap to meet these objectives, enhancing the efficiency, affordability, and connectivity of the Islands' digital economy.

Between site visits, stakeholder engagement, resident surveys, and a Preliminary Market Engagement, we assessed the Falkland Islands' existing digital infrastructure, and identified opportunities for positive progress. With these in mind, we produced a set of recommendations towards an increasingly connected future, all with regulatory and market factors considered to ensure a robust, sustainable network.

The Opportunity

Under the contract of its current supplier of telecommunications services, the digital network of the Falkland Islands has been operating on infrastructure which is no longer meeting all of the needs and potential of its businesses and public services. As such, the upcoming potential end to this license presented the Falkland Islands Government with a positive opportunity to engage with the wider market and see what providers are able to bring its digital infrastructure up to date, and support its residents to maximise the strengths and opportunities of heightened connectivity.

To support this, the Falkland Islands Government required an independent assessment of its current digital environment in order to produce a set of recommendations for improvement which could be easily implemented across the Islands to ensure continuity of services.

Approach

Cambridge Management Consulting worked with the Falkland Islands Government to structure the engagement in two main phases, each designed to build a clear, evidence based path from the current state to a future of high quality, affordable connectivity.

Phase 1 – Assessment and Options Appraisal

The first phase of the project focused on getting a complete and accurate picture of the Falkland Islands' digital infrastructure, demand, and constraints, and using that to develop realistic strategic options.

Key elements included:

- On island infrastructure assessment – Two visits to the Falkland Islands allowed the team to see the existing network and supporting infrastructure first hand and engage directly with local stakeholders.
- Regulatory and cyber security review – Cambridge MC and specialist colleagues reviewed the existing regulatory environment and cyber security posture, identifying where changes would be needed to support new investment, technologies, and service models.
- Demand and service requirements analysis – Through an island wide resident survey, public meetings, and discussions with businesses and public sector organisations, the team identified opportunities for connectivity to support the needs of its residents and businesses.
- Options appraisal for on island telecommunications – Using the evidence gathered, the team developed and appraised a range of technical and commercial options for upgrading the Islands' telecommunications.
- Roadmap and recommendations – The output of Phase 1 was a clear set of recommendations and a roadmap describing how the Falkland Islands could enhance the performance of its connectivity, while managing risk and cost.

Phase 2 – Preliminary Market Engagement

With a preferred strategic direction emerging from Phase 1, the second phase focused on testing assumptions with the market and understanding how potential providers would respond.

This phase included:

- Structured engagement with potential providers – Cambridge MC supported a Preliminary Market Engagement process to discuss the emerging options with the market, exploring feasibility, commercial models, and delivery risks from the perspective of potential partners.
- Refining the options and roadmap – Feedback from the market was used to refine the technical and commercial options, stress test investment assumptions, and ensure that the roadmap remained attractive and realistic for both government and providers.
- Shaping the future regulatory and procurement approach – The team helped the Falkland Islands Government to consider how its regulatory framework and procurement strategy would need to evolve to support the new infrastructure and services, building these considerations into the developing third phase of work.

Throughout both phases, Cambridge MC brought together a multi disciplinary team covering digital infrastructure, regulation, cybersecurity, and procurement. The team worked closely with the Falkland Islands Government, elected officials, residents, and other stakeholders to ensure that the emerging plan was technically robust, economically sound, and grounded in the lived experience of people and businesses across the Islands.

Outcomes

By the end of the second phase, the Falkland Islands Government had:

1. **A clear, evidence based understanding of its current telecoms infrastructure and service gaps, including how these were impacting residents, businesses, education, and essential public services.**
2. **A set of costed, realistic strategic options for upgrading connectivity, tailored to the Falkland Islands.**
3. **A practical roadmap and recommendations that describe how to move from legacy copper infrastructure to high performance connectivity, with clear stages and decision points. If this is implemented as designed, this would enable residents to access enhanced digital services, and would give businesses the heightened connectivity to ease investment, diversification, and growth.**
4. **Insights from the market on feasibility, risk, and investment appetite, helping to ensure that future procurement activity attracts the right partners on sustainable terms.**
5. **The foundations and recommendations for a refreshed regulatory framework that can support new technologies, business models, and levels of service while protecting the interests of residents and the wider economy.**