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The Future of Telecommunications On the Falkland Islands

Stanley– March 25th 2025

Tim Passingham - Chairman

Agenda

Introductions	1	Who are we
Our work with FIG	2	What are we working on
What is happening in the market?	3	What changes present opportunities
What does this mean for you?	4	What specifically can benefit the Falland Islands

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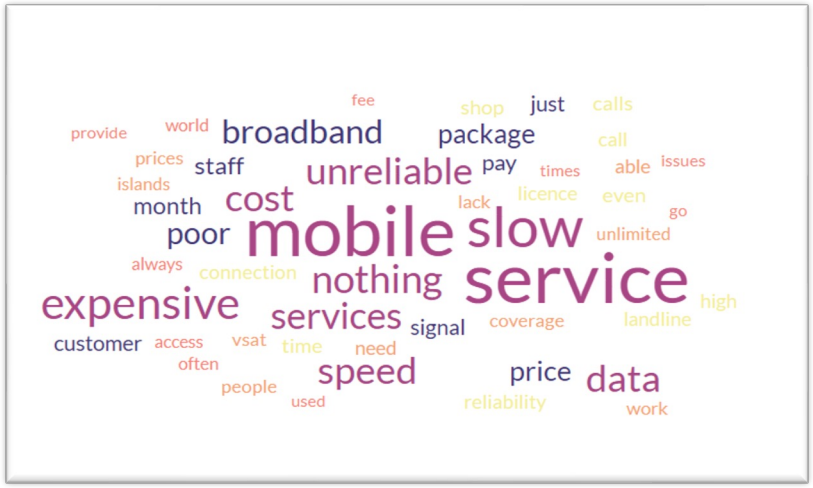
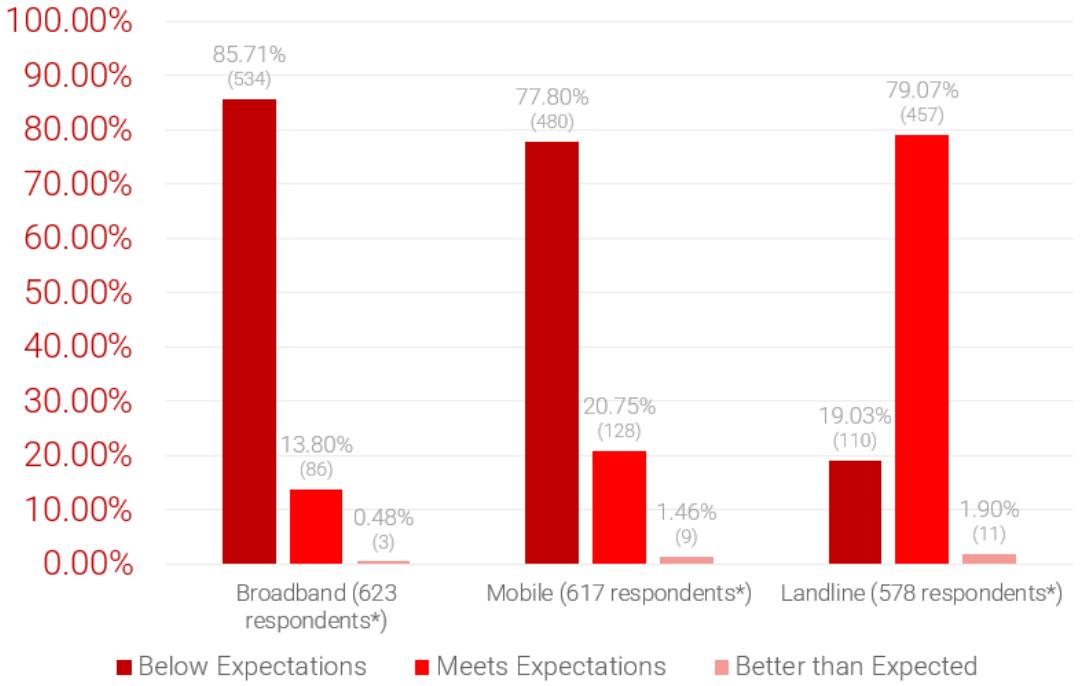
Survey Results – provide some clear feedback to action

- 632 responses –overwhelming
- Huge thanks.



How reliable do you find the Sure Mobile/Broadband and Landline connections?



(*Of a total 632 respondents.)

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What is happening in the market?

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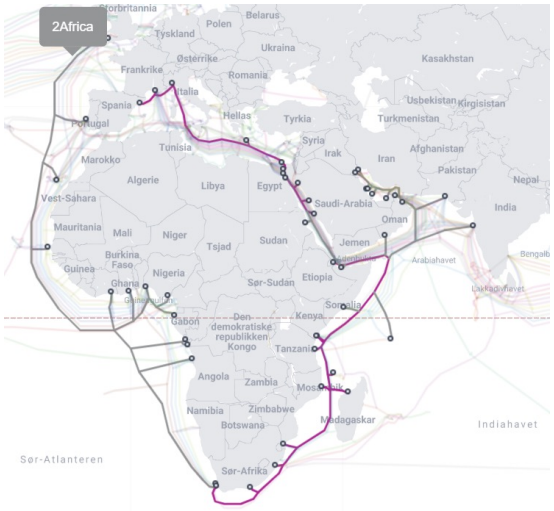
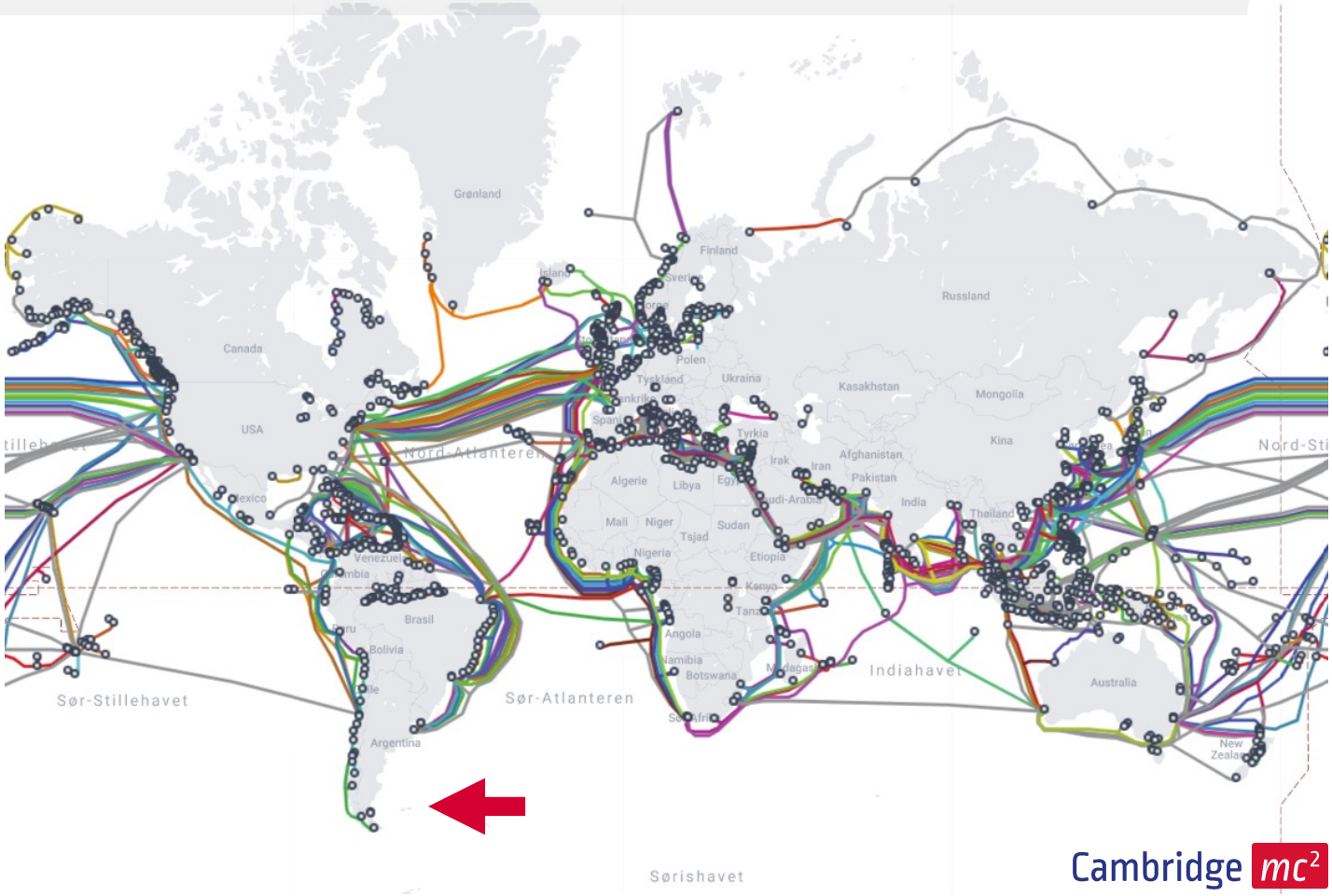
There is increasing and significant investment in submarine fibre cables that underpin the internet globally

- 570 systems in use, 77 new in planning
- Meta (Facebook), Alphabet (Google)
- 99% if all internet traffic (i.e. 1% satellite)





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Direct-to-Smartphone became a reality in 2024– an opportunity for the mobile industry, but also a potential threat to traditional business models

Apple takes 20% stake in Globalstar with $1.5bn satellite investment to boost iPhone connectivity

Connectivity

Google Brings Satellite SOS Feature to Android With Pixel 9

Vodafone, AST SpaceMobile and University of Málaga launch new space and land mobile broadband research and validation hub for Europe

AT&T and Verizon customers will soon be able to make video calls by satellite

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Developments in telecommunications are moving fast!

- Satellite and fibre - coexist
- Terrestrial networks dominating urban and suburban environments.
- Space X has played a critical role in the democratisation of space and for remote regions

Satellite System	Country	Year Live/Planned
Starlink	USA (SpaceX)	2019 (live)
OneWeb	UK	2021 (live)
Project Kuiper	USA (Amazon)	2026 (planned)
AST SpaceMobile	USA	2024 (planned)
Telesat Lightspeed	Canada	2025 (planned)

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The boundary between terrestrial and non terrestrial networks is dissolving: Direct-to-Smartphone connectivity is the next wave of convergence

- LEO satellites offer low-latency, high-speed connectivity
- Satellite communications are becoming more mainstream
- Direct to device is not new – Iridium
- Latest generation of technologies allow mobile phones to connect directly to satellites

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Direct-to-Smartphone connectivity from LEO is starting to mature with major potential for remote locations

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Three Emerging Business Models for LEO Satellite Direct-to-Mobile Services

Direct Integration with Mobile Operators

- Satellite companies partner directly with Mobile Operators to extend mobile coverage
- E.g: AST SpaceMobile, Lynk Global
- Uses standard mobile phones (no hardware change), roaming-style user experience
- Mobile Operators provides billing, SIM, and customer interface

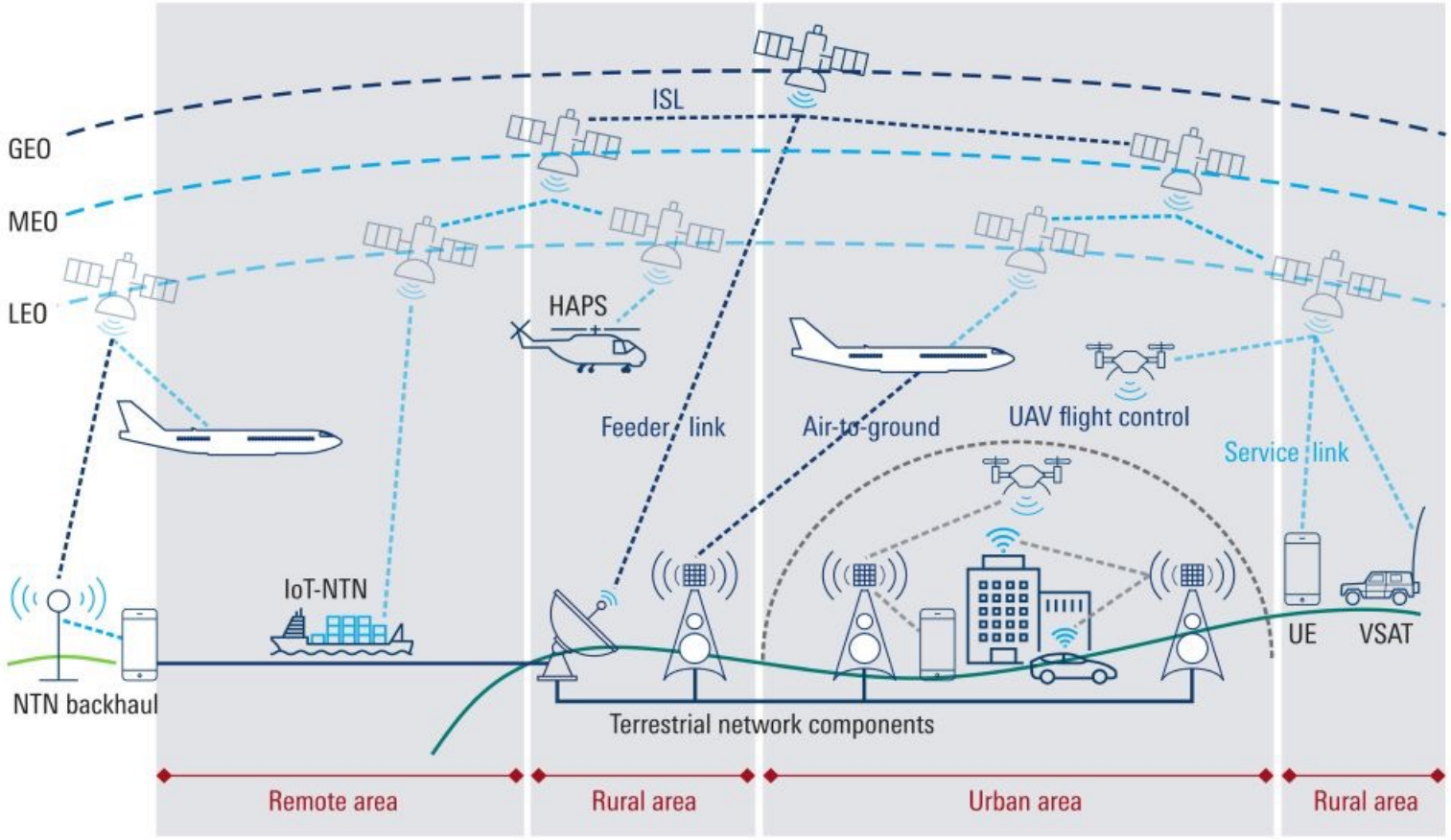
Satellite Connectivity Providers Direct Supply

- Satellite companies offer services directly to consumers, often via apps or subscriptions
- E.g: Starlink (potential future play), potential Amazon Kuiper applications
- May require user sign-up, app, or hardware tweaks
- Independent from Mobile Operators

Hybrid Network Infrastructure Providers

- LEO satellite operators act as wholesale infrastructure providers
- E.g.Telesat Lightspeed, Inmarsat (with future hybrid offerings)
- Mobile Operators or enterprises buy capacity
- Enables mobile backhaul, emergency response, rural coverage

Satellites are playing an addressing more requirements in the telecommunication ecosystem



Source: Rohde & Schwarz

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Examples of what may specifically benefit the Falkland Islands

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Many aspects of Falkland Islands life will all exploit the new digital world to improve the lives of residents

By 2030, the Falkland Islands are set to undergo a remarkable transformation in telecommunications and digital applications.

- This change will be driven by advancements in connectivity , government initiatives, and global technological trends.
- Despite the unique challenges posed by the islands' remote location, investments and technological breakthroughs will enable residents to enjoy a deeply connected and digitally empowered society and should aspire to keep pace with global technology developments.

High-speed broadband and fibre network expansion are expected to deliver gigabit-speed internet across much of the population, moving away from reliance on ageing copper networks.

- The expansion of 4G/5G mobile networks, combined with Low Earth Orbit (LEO) satellite services can revolutionise mobile, IoT, and broadband connectivity, ensuring stable and high-speed internet even in remote areas.
- Various forms of AI, edge computing, digital twins, and similar emerging technologies will play a crucial role in enhancing connectivity and digital applications.

How Digital Education can help the Falkland Islands

Expanding Access to Learning

- Students in remote areas can access quality education in online classrooms without leaving their community.
- Online access to A-levels and University from the UK, reducing the need for 16-year-olds to leave ; students' educational choices at year 11 point won't be compromised by choosing to stay
- E-learning platforms connect Falkland students to international courses and degrees.
- Adults can upskill or retrain through flexible, digital programs.

Strengthening the Economy

- Skilled Workforce: Digital education builds capacity in tech, healthcare, business, and other high-demand sectors.
- Local Innovation: A more educated population drives entrepreneurship and local solutions.
- Attracting Talent: A modern education system makes the Falklands more appealing for families and professionals.

Supporting Teachers and Schools

- Digital Resources: Teachers gain access to interactive tools, global content, and professional development.
- Blended Learning: Combines the best of in-person and digital teaching to enhance student engagement.

Digital education equips the Falkland Islands with the skills, knowledge, and innovation needed for a resilient, future-ready economy.

How Digital Health can help the Falkland islands

Improving Healthcare Access

- Remote consultations reduce the need for travel, especially for residents in outlying areas.
- Digital Health Records - Centralized patient data allows faster, safer, and more coordinated care.
- Remote Monitoring - Chronic conditions can be tracked from home, improving outcomes and reducing hospital visits.

Supporting the Local Economy

- Lower Healthcare Costs: Digital solutions reduce pressure on physical infrastructure and staffing.
- Healthier Workforce: Better access to care means fewer sick days and higher productivity.
- Job Creation: Demand for tech support, digital training, and data management creates new local roles.

Enhancing Public Health

- Faster Response to Outbreaks: Real-time data helps monitor and manage public health risks.
- Health Education: Apps and online platforms can promote wellness and preventive care across the population.

Digital health empowers the Falkland Islands to deliver world-class care, strengthen its workforce, and improve quality of life — all without needing to expand physical infrastructure

How Digital Government Can Help the Falkland Islands

Strengthening the Economy

- Online tax filing, business registration, and licensing make it easier to start and grow local businesses.
- A transparent, efficient digital government builds investor confidence and attracts investment
- Data-driven decision-making improves public spending and infrastructure planning .

Empowering Residents

- 24/7 Access to Services: Islanders can access healthcare, education, and social services remotely — critical for rural and remote areas.
- Civic Participation: Digital platforms allow residents to give feedback, vote, and engage in decision-making.
- Job Opportunities: Government digitization creates demand for IT skills and digital literacy training.

Enhancing Efficiency & Transparency

- Reduced Bureaucracy: Faster processing of documents and applications saves time for citizens and businesses.
- Improved Accountability: Digital records and open data increase trust in public institutions.

A digital government is essential for making the Falklands more connected, efficient, and easy to work with and support the residents of the Falkland Islands.

How Digital Fishing Can Help the Falkland Islands

Boosting the Economy

- Increased Efficiency: Digital tools (e.g., GPS tracking, smart nets, automated sorting) help maximize catches sustainably.
- Better Management: Real-time data allows for better stock management
- Higher Exports: Improved traceability and quality assurance open access to high-value international markets.
- Attracting Investment: Tech-driven fisheries attract funding and partnerships in sustainable seafood.

Supporting Local Communities

- More Jobs: Tech requires skilled workers — creating roles in IT, data analysis, maintenance, and training.
- Youth Engagement: Modernising fishing can make the industry more appealing.

Environmental Protection

- Sustainable Practices: Digital monitoring helps avoid overfishing and protects marine ecosystems.
- Regulation Compliance: Easier enforcement of quotas and catch zones supports long-term viability.

Digital fishing is not just a tech upgrade — it's an investment in the Falklands' economic resilience, community well-being, and environmental future.

Q&A

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Thank You

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