

MEETING OF THE TECHNOLOGY DEVELOPMENT GROUP PUBLIC SUMMARY

Wednesday 11 October 2023

Present:	Andy Keeling	CE	Chief Executive (Chair)
	Becky Clark	DDCS	Director of Development & Commercial Services
	Gareth Goodwin	GG	Chamber Technology/Retail Lead
	Ian Stewart	IS	Construction Sector
	Justin McPhee	JMP	Sure
	James Bates	JB	FIFCA Rep
	Karen Lee	KL	Falkland Islands Tourist Board
	Lewis Clifton	LC	RBA Rep
	Matt Mitchell	CIO	Chief Information Officer
	Simon Young	ACR	Acting Communication Regulator
	Zachary Franklin	ZF	FIDC
Apologies:	Steve Dent	DDDCS	Deputy Director Development & Commercial Services
	Paul Brickle	PB	SAERI
Minutes:	Lauren Peters	DCSOM	Development & Commercial Services Office Manager

Action

Confirmation of the Minutes of the Meeting Held on 19th April 2023

The Minutes of the previous meeting were approved as correct with one amendment: on page 4 paragraph 6 the initials CS will be changed to CE.

Review of Terms of Reference

The Terms of Reference were presented to the group. The CE explained that he has reviewed them, along with DDCS, and they are now with the ACR. A suggested revised version will be circulated to the group before the next meeting, to be confirmed at that meeting.

CE

In discussion members asked that the membership also be reviewed. It should be extended to include FIFCA and FIDC. The role of the community representative was discussed, as a member of the public has indicated a desire to join but it was considered by the CE that the group is most valuable as sectoral representation.

CE has asked members to consider if group is to stay at a sectoral group or not.

CE suggested reviewed annually, DDCS noted it states in the terms of reference for annual review.

Sure update presented by Justin McPhee

JM confirmed a progress update was presented to the RBA on Camp updates.

The Sure team has been working through a list of projects with focus on provision in Camp, the background network, and WiMAX replacement, 4G expansion, the new Earth Station and fixed line improvements.

Fixed line expansion

JM explained that works to upgrade and extend the fixed line provision is necessary due to the pressure of the increasing housing provision. Additionally, as bandwidths go up there is a need to reduce line lengths. Various green cabinets have now been installed, upgrading fibre infrastructure to move closer to the customer; previous line lengths could be as long as 4km with 2 lines per house, some properties are now requiring 7 lines.

IS asked if customers are now on the new fibre lines or will this take a while to happen. JM confirmed it varies depending on location. Equipment is all installed but some locations are still requiring power to be connected by FIG.

Planning permission has been submitted for a larger site opposite Stanley Services. A new green box located on St Marys Walk was driven by congestion in that part of the network, and a mobile site is to be located in Malvina paddock, located next to the Malvina house hotel. 2024 will see a new fibre run up the front road to connect Tussac House, and Sure is also looking to locate a new fixed and mobile site by Byron which will require a 30m tower.

JM explained that the current relay station adjacent to the SAAS yards may be retired due to coverage issues. Future plan will be to locate a new relay station in front of Tussac House.

JM confirmed current cable connections will remain for most residential customers but equipment has been ordered to offer broadband over fibre for business customers initially.

Multiyear project to fit in with site development project, all fibre is on island just requires sites building, looking forward to the next phase of Sapper Hill, Bennetts Paddock is almost full, a new mobile site will inevitably be required west end of Stanley, due to increase in housing development. Work will take a further 2 to 3 years.

Vehicles, building and infrastructure

Sure continues to invest in BAU, including upgrades to vehicles, building and infrastructure.

Earth station upgrade,

Significant progress has been made on the new earth station over the last few weeks, after work during winter month provided challenging due to weather conditions impacting on getting concrete to site, delaying the project slightly. Works will be completed in the coming weeks. The new dish will deal with the fact the original dish is now regularly at maximum capacity following bandwidth increases in 2022. The new dish is now pointing the correct direction giving geographical resilience and significant growth to double the capacity currently delivered.

One Web site preparation is also now nearly completed; a new building has been constructed to house the new drive systems and the antennae are currently being fitted into place. Weather conditions are having slight impacts on schedule, and final equipment is arriving on the next SAAS boat. The LEO system this facilitates will be tested in November and brought online in December. Sure is in talks with One Web about commercial expansion – at present there is only commitment of 10% of Falkland islands traffic through this system. Sure has also received interest from various sectors for dedicated capacity of their own use. This will be considered from January onwards once the system is up and running.

The CIO queried if the OneWeb site had capacity to add further antennas. JM confirmed capacity for further antennas if needed, and that the site will be fenced once works are complete.

IS asked what difference customers will see. JM confirmed there will be no initial changes to packages as the upgrade is to improve the experience and the capacity upgrade was delivered last year. Future upgrades are being looked at and will be driven by commercial demand.

IS commented that money being spent on resilience should have happened long time ago, the main issues he feels are around the speed of the internet and the money being spent on the new geostationary dish with no benefits to the customers doesn't seem practical. JM noted that the current dish is full so money had to spend to grow the network, and resilience is important to minimise outages. JM confirmed Sure is funding the current upgrades.

IS commented that there are other options available such as Starlink that can provide instant resilience. CE asked JM to confirm that Starlink will not do business to business sales. JM commented that Starlink does offer packages for businesses but there is still concern around security. IS commented that he was informed at the last meeting that Sure couldn't resell Starlink which is no longer true, as Starlink has now started a policy of having recognised resellers. JM commented that sure have looked into this option but this requires sales of 1000 terminals per year which is not possible for the Falklands.

IS commented that Starlink is able to offer deals to business as they are providing for multiple islands all over the world and feels that Sure are choosing not to provide a high-speed internet access. The CIO confirmed that he sees Sure as an important partner for resilience, and that adding in something like Starlink, provided through Sure as a re-seller, would add to the overall options and resilience of the Islands if it were possible.

In response to a question about FIG's knowledge of alternative providers, JM confirmed that FIG had visibility of the 5 companies who bid into the most recent new contract and had opportunity to directly ask questions, and this was confirmed by the CE who outlined that FIG operates within the licence and contract. IM reaffirmed his view that Sure is withholding an available commercial option (Starlink) for reasons that have not been adequately explained.

LC confirmed his support for the views expressed by IS and that these represented the views of a wide range of the community of the Falklands. IS stated that long-term residents have to live with whatever FIG and Sure provides, and that he is passionate about making sure the Falklands is not stuck with a solution that is less than the best available. IS also expressed a view that commitment to universal service has become a hindrance to provision. CE confirmed that FIG is looking at the balance between universal service and choice of provision as part of assessing the post-licence period. This will include looking at how the subsidy is targeted. Both IS and LC outlined their experiences that most devices and software these days requires high levels of connection and that the Falklands is being held back.

Camp works 4G Expansion

Sure staff gave a presentation to the RBA during Farmer's Week on the remaining 4G site upgrades. Working with the MOD to gain access to sites and hold discussions on possible new infrastructure is causing delays. Work is ongoing with the subscriber moves which have required software updates.

Radio network equipment due to arrive with new equipment and antennas to replace approx. 50% of the network starting on the northern chain across the Falklands, providing greater capacity in the Camp network replacing equipment that has been in place for 15 years. Works are commencing in the summer.

Top traffic

Entertainment services remain the top traffic (Facebook, YouTube etc) with a large percentage of traffic additionally going via VPN. There was discussion of high traffic for game updates.

VSAT licensing update

The ACR explained that there have been delays with processing of licencing applications due to lack of resource. There are around 6 current VSAT applications, none of which have yet been granted. The AG has been in discussion with Sure and his view is that the exclusive licence does allow for Starlink licences to be granted. This remains a topic of live conversation and may be a matter for the Regulator. In terms of the wider picture, all of the work Sure is doing in Camp is un-economic and has to be subsidised. The picture must be looked at as a whole; broadband offers Sure income, whereas other services are not cost-positive. However the ACR believes that a small number of licences will be granted.

IS asked the AG to confirm if he has to ask Sure before granting licences. The ACR confirmed that he doesn't have to, but in his view it is better to work with Sure to minimise the chance of legal challenge. IS gave a view that Sure would automatically object to any granting of licences and the CIO asked JM if this was true; JM said it would depend on context – e.g. the Ascension Island model means running a service there is not economic anymore, in Camp there are people who don't live there long enough to come under universal provision – in circumstances such as these they wouldn't necessarily object. IS, backed by LC, re-affirmed the view that this issue could be solved if Sure could provide Starlink or a similar level of service. KL asked if new fibreoptic cables in Stanley and the new LEO provision will meet some of the demands being made around increases in speed. JM said they have around 2000 customers over a large area and so the focus on capacity rather than speed, as more speed needs more bandwidth, which is currently the choke point. The LEO technology will give a better experience to those using low latency programmes, but won't affect speed.

JB asked if Sure can veto licences and the AG confirmed this is not the case, nor will ever licence be discussed with Sure. LC asked if Starlink is categorised as a VSAT – the AG and JM confirmed it is, and the AG also confirmed that anything that is not a VSAT cannot be considered outside the exclusive licence.

The CIO asked if there was a Starlink network set up, could Sure deliver it? JM said it depends, as currently limit on cables is 24MB via VDSL, sometimes less.

IS asked if Sure could install Starlink on its sites and use it for distribution across the Falklands. JM said Starlink does offer commercial products and these are new in their product portfolio.

IT was asked if some of the larger current commercial users be moved to OneWeb – CIO confirmed he thinks this is a good idea and JM said that Sure is exploring how to offer this as a commercial offer when the system is up and tested.

DDCS suggested a conversation between JM, the CIO and herself to bring a specific piece back to either the TDG or another public forum, looking with rigor at possibilities within the current exclusive licence period. JC asked that in any conversation about within the current period, the need for Camp and mobile broadband provision, both for general comms but also for scientific research etc, is taken into account. IS similarly asked that tourism is taken into account.

DDCS

Any Other Business

DDCS update from previous meeting presentation

DDCS updated on the short- and medium-term actions identified at the last meeting:

- Employment of a subject matter expert within FIG to advise government on options to consider in the growing telecoms market. *DDCS and CIO are in conversation about this and hope to have resource available by 2024.*
- Update of TDG Terms of Reference to embed it as a key user group and mouthpiece of private and third-sector bodies into the process of establishing options after current exclusive licence period. *This will be confirmed at the next meeting and TDG members are asked to consider their applicability to the task of scrutinising and informing the post-licence tender process.*
- FIG to upgrade its ICT infrastructure to enable it to run more efficiently and reliably. *The CIO has now taken the service in house but advises there are several years of work to make it fully resilient.*
- FIG to invest in testing alternative internet technologies (as allowed for under the current exclusive licence) to establish viability, scalability etc. *FIG is going through the internal process to allow this to happen. TDG members encouraged the CE to allow this to proceed at pace.*
- FIG to procure specialist independent advice to assess all market-available and emerging options, to inform options of provision of all telecoms (landline, mobile, broadband etc) after end of current exclusive licence period. *This will be joint work between DDCS and CIO and will look at all available options.*

Long term actions around consideration of undersea cabling not something that is actively being worked on.

DDCS confirmed that FIG is actioning short- and medium-term actions as quickly as possible as intended 2024 completion dates to lead into 2025 with a clear spec and process to allow time to be able to go out to market. TDG will have visibility of the tender process, although some elements will be commercially sensitive. LC thanked DDCS as this has not been offered previously. ACR noted that the contract only ends when notice is given.

The CE confirmed that FIG is not interested in taking decisions for the short term, part of this work has to be where technology will be within the next 5 to 10 years.

IS expressed a view that competition is vital and that in the last round allowing VSATs would have created that. DDCS confirmed that contracting strategy will be designed to allow for the best available provision to be what providers have to offer.

AOB

The CIO commented that he is aware of some problems with downloads from the FIG website. This is not an issue with Sure but due to low capacity on the host site and the CIO is arranging to have website moved to a different cloud.

GG asked if there is now a Regulator in place. The AG confirmed the situation is still interim and a permanent long-term regulator might be considered.

JB asked if there has been progress on mobile phone hot-spots around Stanley. JM confirmed there has been and there is work on a taller mast to allow for broadcast of service around the airport/Surf Bay area.

IS commented that he was informed that It is not illegal to own the equipment for Star link in the Falkland's, but it is to use it.