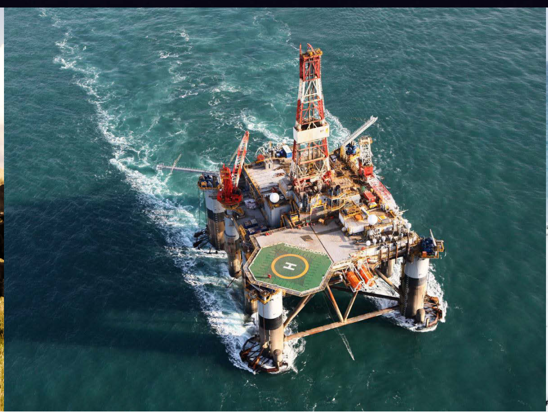
STATISTICAL YEAR BOOK

Falkland Islands Government



2014

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ABBREVIATIONS

ACRONYM	MEANING
AVGAS	AVIATION FUEL
AV.	AVERAGE
BOE	BANK OF ENGLAND
BOTC	BRITISH OVERSEAS TERRITORIES AND COUNTRIES
CAGR	COMPOUND ANNUAL GROWTH RATE
CIF	COST, INSURANCE AND FREIGHT
EC	EUROPEAN COMMUNITY
ECB	EUROPEAN CENTRAL BANK
EDS	ECONOMIC DEVELOPMENT STRATEGY
EP	ENVIRONMENTAL PLANNING
FI	FALKLAND ISLANDS
FICS	FALKLAND ISLANDS COMMUNITY SCHOOL
FIG	FALKLAND ISLANDS GOVERNMENT
FKP	FALKLAND ISLAND POUND
GCSE	GENERAL CERTIFICATE OF SECONDARY EDUCATION
GDP	GROSS DOMESTIC PRODUCT
IJS	INFANT JUNIOR SCHOOL
KEMH	KING EDWARD MEMORIAL HOSPITAL
KWH	KILOWATT HOURS
MOD	MINISTRY OF DEFENCE
MPA/MPC	MOUNT PLEASANT AIRPORT/COMPLEX
NCU	NATIONAL CURRENCY UNIT
NO.	NUMBER
NPISH	NON-PROFIT INSTITUTION SERVING HOUSEHOLDS
OECD	ORGANISATION FOR ECONOMIC COOPERATION AND DEVELOPMENT
PL	PRODUCTION LICENCE
PWD	PUBLIC WORKS DEPARTMENT
RCP	ROYAL COLLEGE OF PHYSICIANS
RFIP	ROYAL FALKLAND ISLANDS POLICE
RPI	RETAIL PRICE INDEX
SNA	SYSTEM OF NATIONAL ACCOUNTS
SSSI	SITE OF SPECIFIC SCIENTIFIC INTEREST
TDS	TOURISM DEVELOPMENT STRATEGY
UK	UNITED KINGDOM
UN	UNITED NATIONS
USD	US DOLLAR

INTRODUCTION

This is the Falkland Islands Statistical Yearbook 2014; the document has been published to give a snapshot of the Falkland Islands society, economy and environment. The document provides statistics and indicators relating to various areas of Falkland Islands society, environment and economy.

The purpose of this document is to provide a central source of key information and data relating to all aspects of the Falkland Islands; there is brief commentary relating to each section to provide basic context to each section and set of statistics.

Due to data constraints and data availability the figures included in this document reference the 2013 calendar year or 2012/13 fiscal year. There are a number of statistics that may refer to different years but this has been acknowledged in the document. The majority of comparative data has been based on the previous 5 years but some comparative data has been based on greater timescales.

All data and values have been referenced to their source and all references are detailed in the form of footnotes on the relevant pages.

For further information relating to any of the statistics or data stated in this document please contact Jay Gamble, Statistics & Performance Officer in the FIG Policy Unit; JGamble@sec.gov.fk or Policy@sec.gov.fk.

1. GEOGRAPHY & ENVIRONMENT

The Falkland Islands are situated in the South Atlantic between latitudes of 51°S and 53°S and longitudes 57°30'W and 61°30'W. The Falkland Islands consist of East and West Falkland and 778 smaller offshore islands.

The climate is often cool throughout the year and is characterised by strong persistent winds, which tend to average higher speeds during the summer months. Rainfall is often highest during the summer. The highest rainfall encountered in 2013 was during December with monthly rainfall recorded at 71mm, with lowest rainfall recorded during September at 37mm. The highest temperature during 2013 was recorded at 25°C and the lowest was -10°C.

FIGURE 1.1 – MAP OF THE FALKLAND ISLANDS

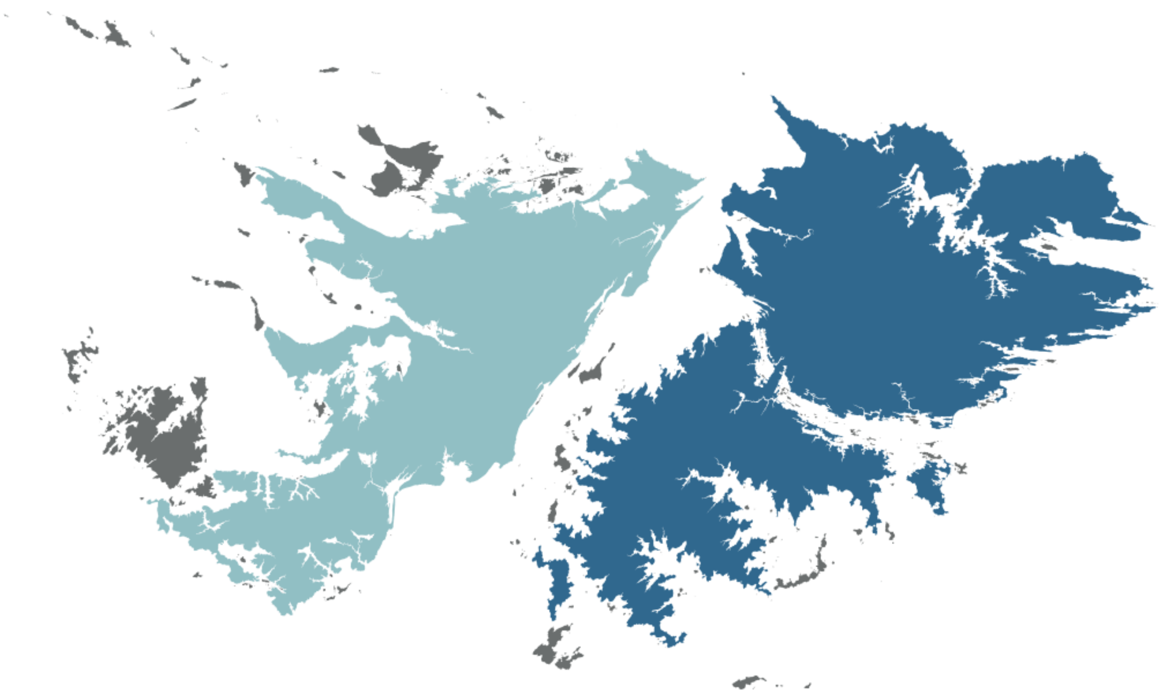


TABLE 1.1 - TOTAL LAND AREAS[1] & COASTLINE

	LAND AREA KM^2 (Approx.)
EAST FALKLAND:	6,600 km^2
WEST FALKLAND:	4,500 km^2
OUTER ISLANDS:	800 km^2
TOTAL	11,900 km^2

	COASTLINE KM (Approx.)
EAST FALKLAND:	3,100 km
WEST FALKLAND:	2,100 km
OUTER ISLANDS:	2,200 km
TOTAL	7,400 km

[1] Statistics provided by FIG Environmental Planning Dept.

TABLE 1.2 - NATURAL FEATURES:

FEATURE(S)	
NUMBER OF ISLANDS[2]:	778
HIGHEST NATURAL POINT (EAST):	MOUNT USBORNE: 705m
HIGHEST NATURAL POINT (WEST):	MOUNT ADAM: 700m
NUMBER OF RIVERS:	4 LARGE RIVER CATCHMENTS
AREA OF LAND FOR FARMING PURPOSES:	11,200 km^2 (94%)
AREA OF FOREST:	-
NUMBER OF LAKES:	4

TABLE 1.3 – CLIMATE[3] DURING 2013:

MEASUREMENT	UNIT(S)
TEMPERATURE (MAX):	25°C
TEMPERATURE (MIN):	-10°C
TEMPERATURE (AVERAGE):	10°C (SUMMER) / 2°C (WINTER)
AVERAGE WINDSPEED:	16 KNOTS
RAINFALL AVERAGE (PER ANNUM):	630mm (STANLEY & PORT HOWARD)
	430mm (AWAY FROM MOUNTAIN RANGES)
RAINFALL (MONTH HIGHEST):	DECEMBER: 71mm (STANLEY & PORT HOWARD)
RAINFALL (MONTH LEAST):	SEPTEMBER: 37mm (STANLEY & PORT HOWARD)

The Falkland Islands is home to a vast and diverse range of wildlife and to help monitor, conserve and protect the environment and its inhabitants there are number of organisations within the Islands. The organisations include the FIG Directorate of Natural Resources, FIG Environmental Planning Dept., Falklands Conservation and SAERI (South Atlantic Environmental Research Institute).

TABLE 1.4 - PROTECTED SPECIES (AS OF 2013)

SPECIES	NUMBER PROTECTED
BIRDS	ALL BIRD SPECIES PRESENT IN THE FALKLAND ISLANDS[4] (79 SPECIES)
FISH	2
INSECTS	ALL BUTTERFLY SPECIES[5]
MAMMALS	ALL MARINE MAMMALS PRESENT IN FALKLAND ISLAND WATERS[6]
PLANTS	29

TABLE 1.5 - PROTECTED WILDLIFE CONSERVATION AREAS/ SSSI'S (AS OF 2013)

NO. OF PROTECTED AREAS / SSSI'S	TOTAL AREA PROTECTED	% OF ALL LAND
19 - NATIONAL NATURE RESERVES (INC. MULTIPLE ISLANDS)	23,832 ha	2%

[2] Woods, R. W. (2001) A survey of the number, size and distribution of islands in the Falklands archipelago. The Falkland Islands Journal 7(5): 1–25.
[3] Climate information provided by Met.Office based at MPC and FIG Environmental Planning Dept.
[4] Except Upland Geese, Mallard Duck and 2 duck species which can be shot in the winter months
[5] FIG EP Dept. - One species; the Queen of the Falklands Fritillary breeds in the Falklands. 2 other species are present but their breeding status is unconfirmed.
[6] FIG EP Dept. - Up to 25 species of whales and dolphins have been sighted in the waters around the Falklands. 5 species of whale and 2 dolphin species are regularly seen around the Falklands. 3 species of seal and sea lion breed in the Falkland Islands in large numbers, 3 other species are known to visit the Falkland Islands.

2. POPULATION[7]

The population figures are based on the results from the 2012 Census and previous Census reports.

TABLE 2.1 – OVERALL POPULATION:

POPULATION	1991	1996	2001	2006	2012
TOTAL PRESENT ON CENSUS NIGHT	2,181	2,602	2,984	3,084	3,135
TOTAL RESIDENT POPULATION ON CENSUS NIGHT[8]	2,091	2,564	2,913	2,955	2,840
TOTAL USUAL RESIDENT POPULATION[9]	2,300	2,742	3,096	3,168	2,931
MALES[10]	1,116*	1,447	1,598	1,569	1,491
FEMALES[10]	975*	1,117	1,315	1,386	1,349
POP. DENSITY (people per km^2)	0.18	0.22	0.24	0.25	0.24

*Records for MPA were not collect during this Census.

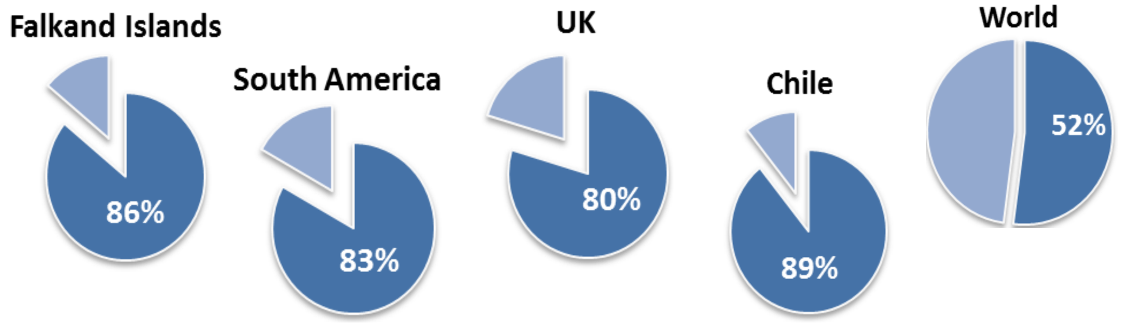
TABLE 2.2 – LOCATION OF POPULATION:

LOCATION OF POPULATION	1991	1996	2001	2006	2012
STANLEY	1,582	1,636	1,989	2,115	2,120
EAST FALKLAND	246	233	208	194	202
WEST FALKLAND	198	174	144	127	127
OUTER ISLANDS	65	38	38	42	22
MPA	*	483	534	477	369
TOTAL	2,091	2,564	2,913	2,955	2,840
URBAN POPULATION (EXC. MPA)	76%	79%	84%	85%	86%
URBANISATION RATE (EXC.MPA)	OVERALL CHANGE +10% / ANNUAL AVERAGE +0.5%				

*Records for MPA were not collect during this Census.

As shown in Table 2.2, the location of the population is heavily concentrated in Stanley and this increase has been occurring at an average of 0.5% per year, while the Camp[11] population is continuing to decline.

FIGURE 2.1 - URBAN POPULATION[12] (% OF POPULATION LIVING IN URBAN AREAS)



[7] Population data extracted from various FIG Census Reports (1991-2012)

[8] This figure excludes temporary visitors in the Islands on Census night but includes temporary residents based at MPA (excluding military garrison).

[9] This figure excludes temporary visitors in the Islands on Census night but includes FI residents who were overseas during this time.

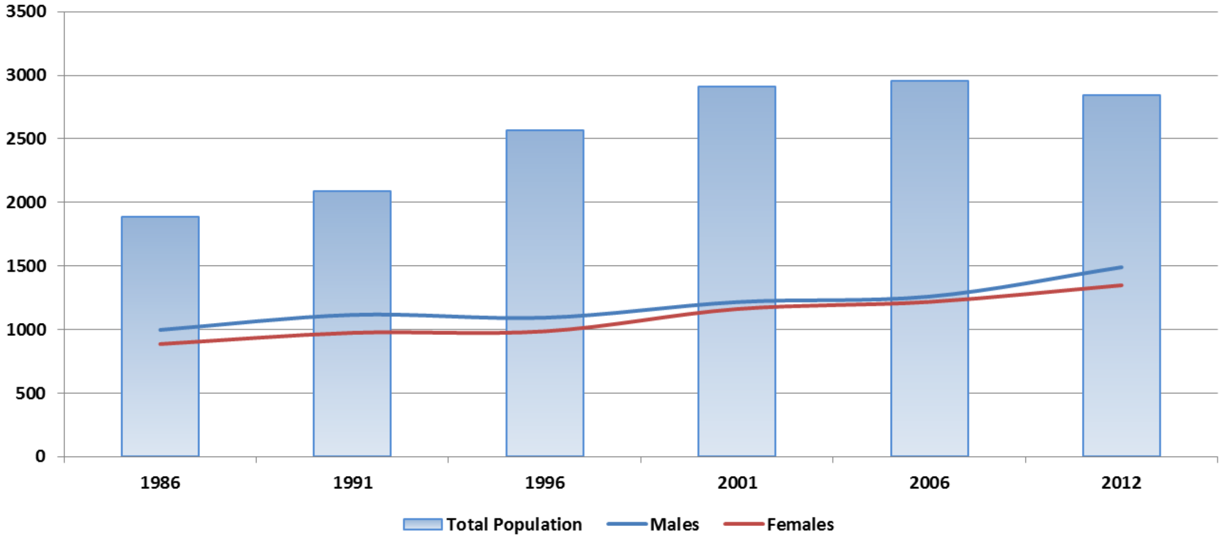
[10] Male and Female totals are based on Total Resident Population on Census night.

[11] 'Camp' is a colloquial term used within the Islands and refers to rural regions.

[12] All figures (excluding FI) from the United Nations (2014): *World Urbanization Prospects: 2011 Revision*. http://esa.un.org/unup/unup/index_panel3.html. FI figures exc. MPA.

The proportion of the population living in urban areas is comparable to that of Chile which is 89% and is much higher than the global average of 52%.

FIGURE 2.2 – TOTAL POPULATION 1986 – 2012



The population within the Falkland Islands is ageing and Table 2.3 shows that in 1991; 10% of the population (exc. MPA) were aged 65 or over, this rose to 14% in 2012. Based on the figures from the Census 2012 the current dependency ratio is 0.44. Therefore, for every 10 people of working age (15-64), there are over 4 dependents (people of non-working age). This is similar to many developed nations[13] such as Chile (0.45) and Canada (0.46). It is currently lower than the UK (0.54).

TABLE 2.3 - AGE OF POPULATION[14]:

AGE OF POPULATION	1991	1996	2001	2006	2012
0 - 14	421	399	437	458	455
15 – 64	1,482	1,478	1,702	1,755	1,703
65 AND OVER	187	211	237	265	298

Table 2.4 shows the number of births, marriages and deaths, as can be seen there is a high degree of variance from year to year and due to the small numbers involved the birth rates and deaths rates can vary dramatically from year to year.

TABLE 2.4 – BIRTHS, MARRIAGES AND DEATHS[15]:

OCCURANCE	2009	2010	2011	2012	2013
BIRTHS	34	31	26	31	26
MARRIAGES	10	16	15	13	7
DEATHS	19	10	13	14	17

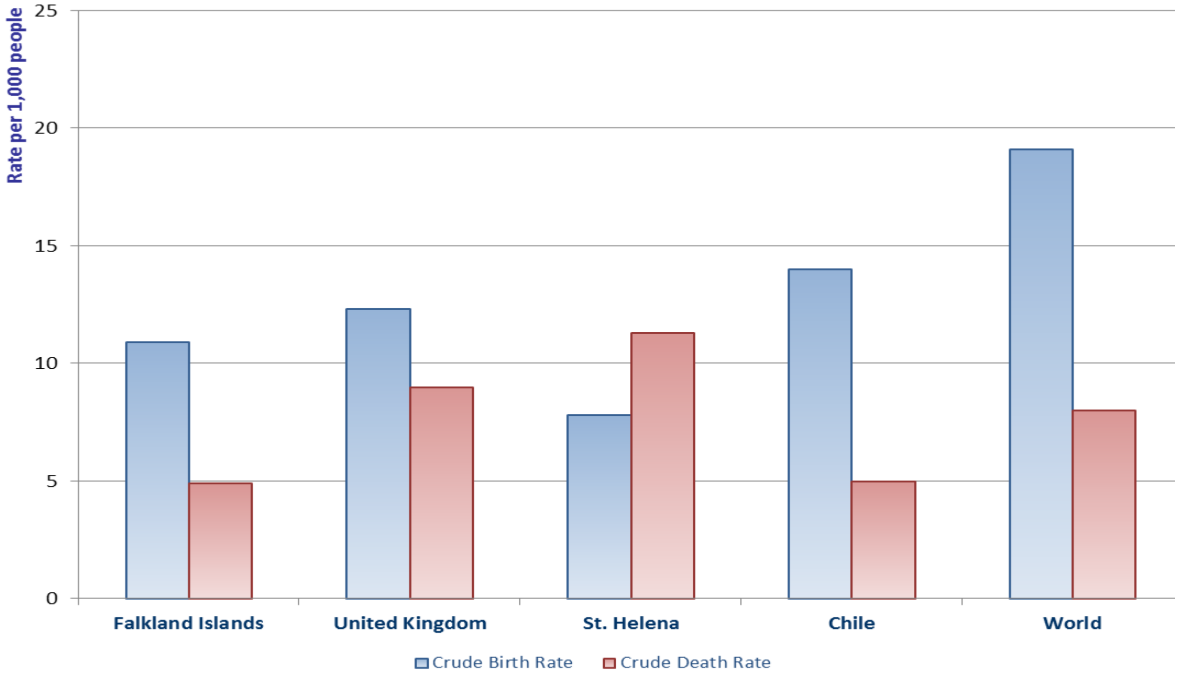
[13] Dependency ratios are from World Bank (2014): *Age dependency ratio (% of working age population) 2013* http://data.worldbank.org/indicator
[14] Figures do not include temporary residents at MPA
[15] Data from FIG Registry Office records 2009-2013.

As Table 2.5 shows, the crude birth rate in the Falkland Islands is much lower than the world average, although it is higher than the crude birth rate of a similar small island nation such as St. Helena. The crude death rate is lower than any of the other countries listed in Table 2.5 and is almost half that of the world average.

TABLE 2.5 – BIRTH RATE AND DEATH RATES (PER 1,000 PEOPLE):

COUNTRY	CRUDE BIRTH RATE	CRUDE DEATH RATE
FALKLAND ISLANDS (2012)	10.9	4.9
UNITED KINGDOM[16]	13.0	9.0
ST. HELENA[17]	7.8	11.3
CHILE[16]	14.0	5.0
WORLD[16]	19.1	8.0

FIGURE 2.3 - CRUDE BIRTH AND DEATH RATES (PER 1,000 PEOPLE)



A life table (actuary table) was constructed to provide an estimate of life expectancy from birth based on death rates between 2006 and 2012. As Table 2.6 shows the overall average life expectancy from birth is just under 78 years old. This is not the maximum age people in the Falkland Islands live to but based on the probability calculated from deaths since 2006 this is the average age a person can expect to live to. Table 2.6 also shows that there is a significant difference in life expectancy amongst males and females; the figures show that females in the Falkland Islands can currently expect to live 4 years longer than males

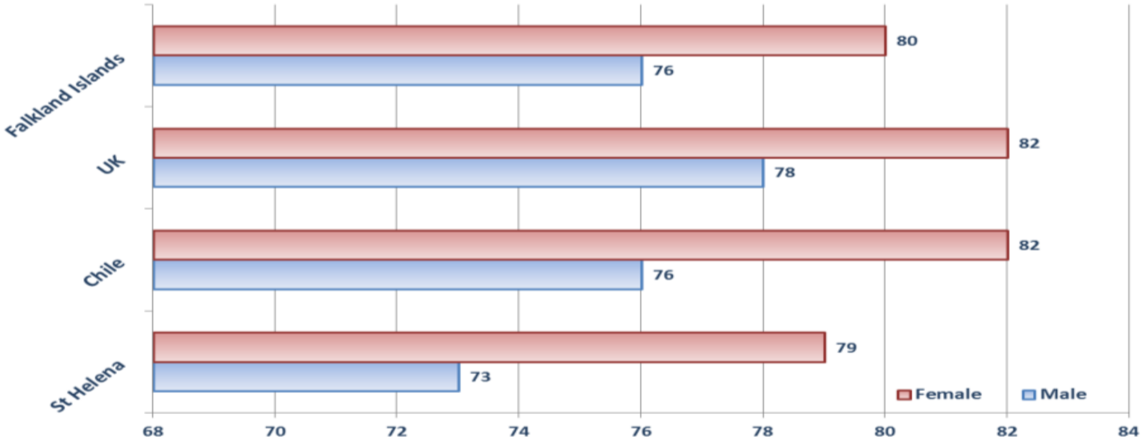
[16] World Bank: (2014) *World Development Indicators 2011* http://wdi.worldbank.org/table/2.1
[17] St. Helena Government: *Statistical Yearbook 2012-13*.

TABLE 2.6 – LIFE EXPECTANCY[18]

AGE	MALE (e)[19]	FEMALE (e)[19]	OVERALL (e)[19]
0	75.6	79.6	77.9
5	72.4	74.6	73.8
10	67.4	69.6	68.8
15	62.4	64.6	63.8
20	57.9	60.1	59.3
25	53.5	55.1	54.7
30	48.5	50.1	49.7
35	44.0	45.1	44.9
40	40.2	40.4	40.7
45	35.2	35.7	35.8
50	30.4	31.0	31.1
55	27.1	26.5	27.2
60	22.5	22.3	22.8
65	19.2	18.6	19.3
70	15.3	14.1	15.1
75	11.2	10.3	11.2
80	7.7	6.9	7.4
85	5.4	4.6	5.0
90	2.2	2.2	2.3

Figure 2.4 shows that although life expectancy in the Falkland Islands is slightly lower compared to the UK, it is still higher than in some other small island states such as St. Helena.

FIGURE 2.4 - LIFE EXPECTANCY COMPARISON[20]



[18] Calculated from FIG Registry: Birth and Deaths rates since 2006.
[19] *e* is the number of years a person of the given age is expected to live based on the death rates experienced between 2006 – 2012.
[20] All data (exc. Falkland Islands) from United Nations (2014): *World Population Prospects 2012 Revision http://esa.un.org/unup/unup/index_panel3.html*

TABLE 2.7 – POPULATION BY CITIZENSHIP

CITIZENSHIP	1991	1996	2011	2006	2012	2012 (%)
AFRICA	0	3	1	1	2	<1%
ASIA	1	27	7	13	7	<1%
AUSTRALASIA	25	25	19	53	57	2%
BRITISH/BOTC[21]	2046	2031	2270	2282	2588	92%
EUROPE	8	14	19	33	33	1%
NORTH AMERICA	18	20	11	14	6	<1%
SOUTH AMERICA	23	30	22	51	118	4%

Table 2.7 shows there is diverse a population within the Falkland Islands and although the citizenship amongst the majority of the population is British, there are citizens from across the globe. There has been a notable increase in the number of the population with South American citizenship since 1991.

FIGURE 2.5 – POPULATION BY CITIZENSHIP (EXC. BRITISH & OVERSEAS TERRITORIES CITIZENS)

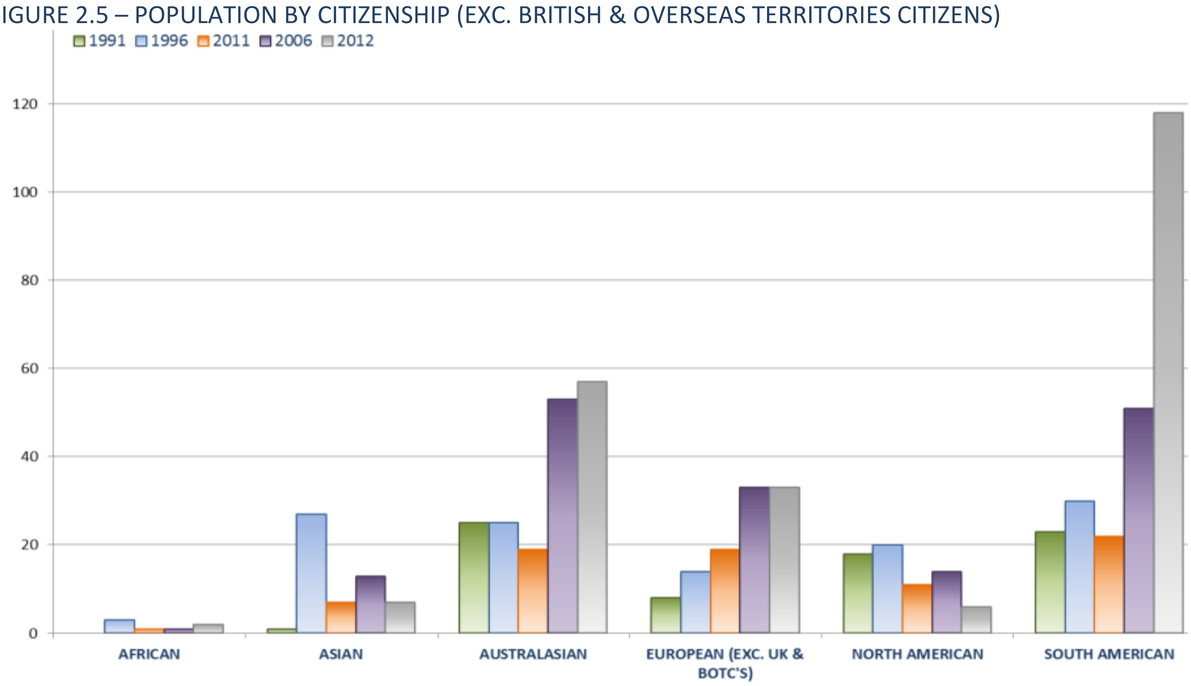


Table 2.8 shows electoral roll by location. Although the electoral roll can be used as an indicator for population change, it can be misleading due to members of the population who are eligible to vote having the choice to be on the electoral roll. A number of variables can also be attributed to the electoral role increasing; such as the number of people turning eighteen therefore making them eligible to vote. Immigration status can also have an impact, such as people being granted Falkland Islands Status (only FI Status Holders can vote), which can only be granted after residing in the Islands for a certain number of years.

TABLE 2.8 - ELECTORAL ROLL

LOCATION	2009	2010	2011	2012	2013	2013 (%)
CAMP	258	261	260	278	279	17%
STANLEY	1324	1308	1311	1339	1382	83%
TOTAL	1582	1569	1571	1617	1661	100%

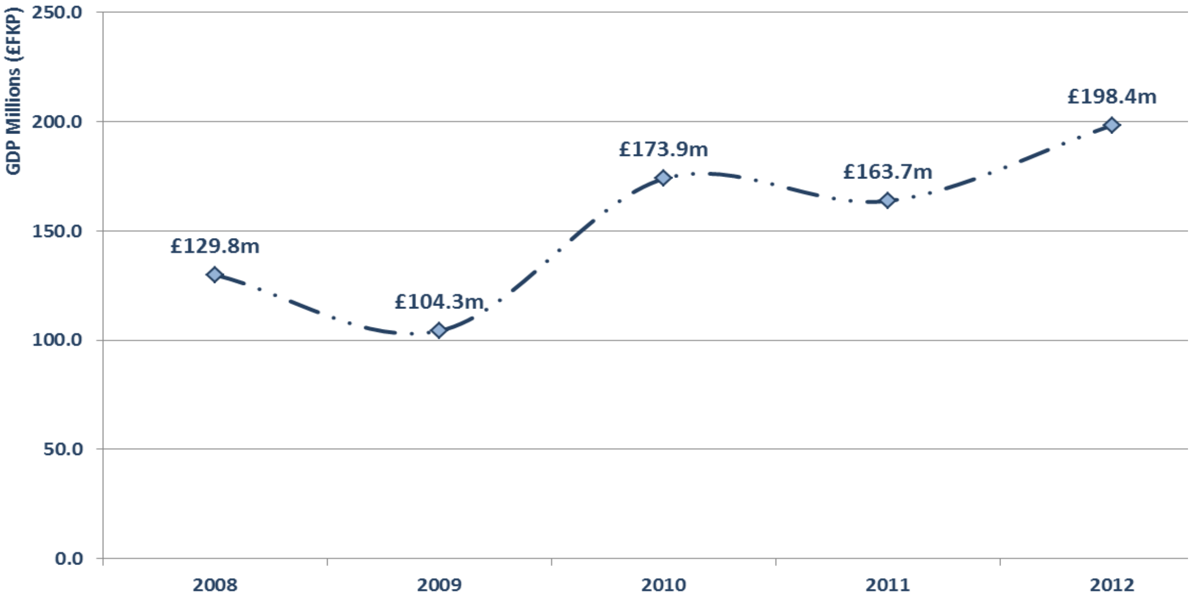
[21] British Overseas Territories and Countries

3. ECONOMY

The Falkland Islands economy has experienced overall growth in the last 5 years; this is in part due to hydrocarbon exploration within Falkland Islands waters, which has attracted a number of investors and international companies creating more jobs and wealth in the region. The fishing catches in the last few years have been relatively strong which, accompanied with the additional income from oil exploration, has meant the Falkland Islands has witnessed steady growth in the economy. Over the last 5 years *real*[22] Gross Domestic Product (GDP) has seen an annual compound growth rate of 11%.

GROSS DOMESTIC PRODUCT (GDP)

FIGURE 3.1 – GROSS DOMESTIC PRODUCT (REAL - AT CONSTANT PRICES) 2008 - 2012



The GDP per capita in the Falkland Islands for 2012 was high; this is a positive sign for the country, as it symbolises high amounts of economic activity within the Islands during that year. GDP is often assumed to equate directly to wealth and this can be misleading; GDP does not take into account money that may leave the country via companies that operate internationally and it does not represent the distribution of wealth amongst the overall population. It is generally seen as an indicator for economic activity and productivity.

Table 3.1 shows that the GDP per capita in the Falkland Islands is $122,000, which is comparable to other nations with oil & gas resources such as Norway and Qatar ($100,000 & $94,000 respectively) and other small states such as Monaco ($105,000) and Luxembourg ($152,000). However, it is significantly higher than many other countries but as noted above GDP is not an accurate measure of the standard of living in the islands. Due to the small population and high amounts of fishing and oil & gas exploration activities during 2012 the GDP per capita was high. When oil/gas and fishing activities are excluded from the calculation, GDP per capita is around $48,000; which is similar to that in Japan and Austria ($47,000).

[22] This is not to be confused with *Nominal* GDP – When comparing GDP over time *Real* GDP produces an inflation adjusted measure that reflects the value of all goods and services produced for that particular year, whereas nominal GDP does not take these changes in to account, *Real GDP* is based on constant prices.

TABLE 3.1– GDP PER CAPITA[23] COMPARISON (AT CURRENT PRICES, USD) 2012

COUNTRY	GDP PER CAPITA (USD)
FALKLAND ISLANDS (INC. OIL & FISHING INDUSTRIES)	$ 122,000.00
FALKLAND ISLANDS (EXC. OIL & FISHING INDUSTRIES)	$ 48,000.00
UNITED KINGDOM	$ 39,000.00
CHILE	$ 15,000.00
WORLD	$ 10,000.00

TABLE 3.2 - VALUE ADDED, GROSS / GROSS DOMESTIC PRODUCT BY INSTITUTIONAL SECTORS (AT CURRENT PRICES)

INSTITUTIONAL SECTORS		2008	2009	2010	2011	2012
S11 & S12	NON-FINANCIAL & FINANCIAL CORPORATIONS	£89.5m	£63.8m	£137.0m	£150.8m	£162.1m
S13	GENERAL GOVERNMENT	£20.3m	£20.4m	£22.0m	£23.6m	£24.3m
S14	HOUSEHOLDS	£10.9m	£11.6m	£11.1m	£10.5m	£11.2m
S15	NPISHS	£0.6m	£0.6m	£0.7m	£0.7m	£0.8m
S1	TOTAL ECONOMY	£121.2m	£96.4m	£170.8m	£185.7m	£198.4m

As Tables 3.2 & 3.3 show, the value added from *Non-financial and Financial Corporations* has increased significantly since 2008, this equates to almost a 10% increase in the proportion of GDP. During the same period the proportion of value added from general government has decreased by around 4%. If the oil and gas industry was omitted from GDP there would have been little change in the proportion of value added attributed to *General Government*.

TABLE 3.3 - VALUE ADDED, GROSS / GROSS DOMESTIC PRODUCT BY INSTITUTIONAL SECTORS (% OF GDP AT CURRENT PRICES)

INSTITUTIONAL SECTORS		2008	2009	2010	2011	2012
S11 & S12	NON-FINANCIAL & FINANCIAL CORPORATIONS	73.8%	66.1%	80.2%	81.2%	81.7%
S13	GENERAL GOVERNMENT	16.7%	21.2%	12.9%	12.7%	12.3%
S14	HOUSEHOLDS	9.0%	12.1%	6.5%	5.7%	5.7%
S15	NPISHS	0.5%	0.6%	0.4%	0.4%	0.4%
S1	TOTAL ECONOMY	100.0%	100.0%	100.0%	100.0%	100.0%

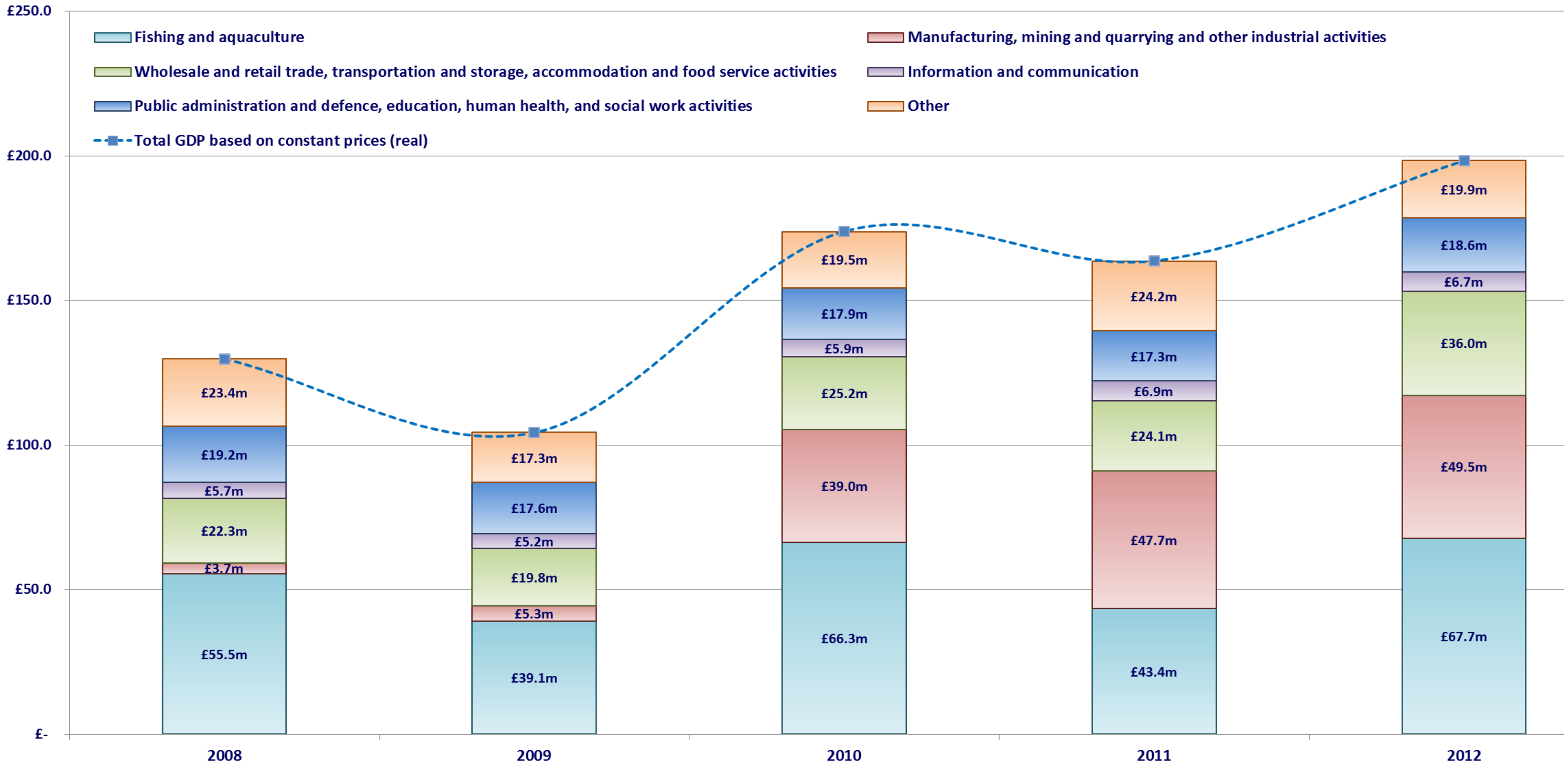
Total GDP in 2012 was £198.4m; Figure 3.2 shows the largest A*10[24] sector is *fishing and aquaculture (of which aquaculture contributes a small proportion),* which shows £67.7m (34%) of value was added by this sector, compared to c. £50m (25%) from *manufacturing, mining and quarrying and other industrial activities* (*predominantly oil related activities)*.

The proportion of value added by the *wholesale and retail trade, transportation and storage, accommodation and food service activities* increased in 2012, equating to £36.0m (18%) of value added, the increase in the contribution by this industry is due to growth in the *transportation* and *storage* sectors.

[23] Based on UN National Accounts Main Aggregates Database; 2012 United Nations Statistics Division - National Accounts. £GBP converted to $US based on 2012 average Bank of England: Historic Exchange Rates. Purchasing power parity has not been calculated for these comparisons.

[24] ISIC A*10 categories are defined in the UN System of National Accounts 2008

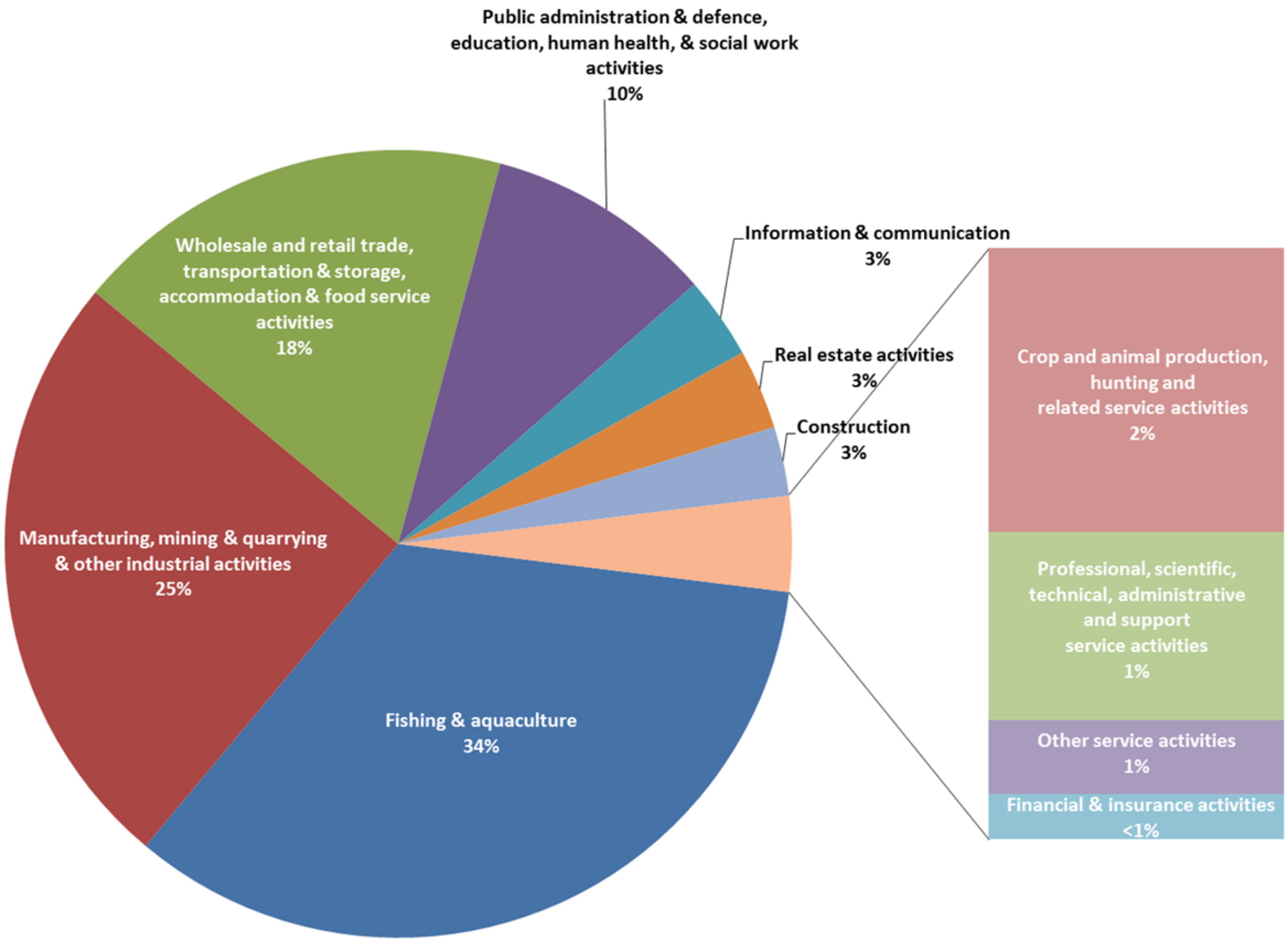
FIGURE 3.2 – GDP AT CONSTANT PRICES (REAL) 2012: VALUE ADDED BY A*10 CATEGORIES[25]



Public administration & defence, education, human health & social work activities contributed almost 10% of value added in 2012; the value added from this sector has stayed relatively similar in the last 3 years, however the five year average is just over 12%.

[25] The five biggest sectors in relation to value added have been demonstrated individually, the remaining sectors have been combined into the 'other' category.

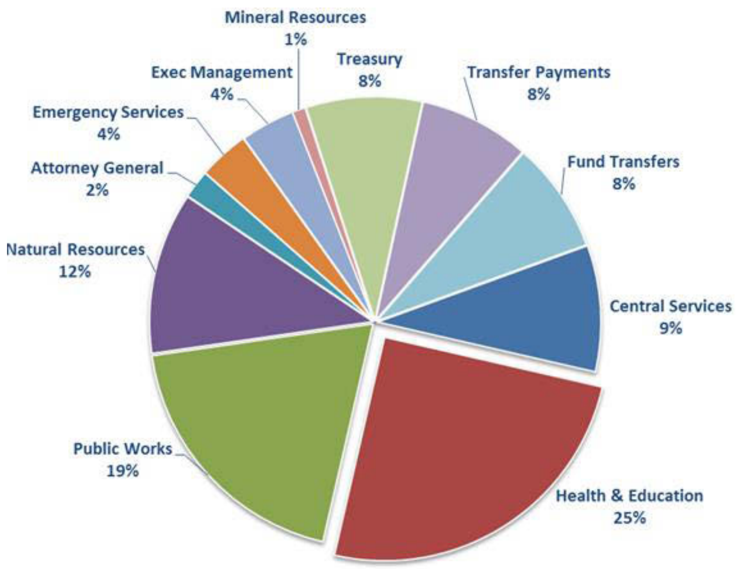
FIGURE 3.3 - GDP 2012 (NOMINAL): PERCENTAGE OF GDP BY A*10 CATEGORY (ALL SECTORS)



GOVERNMENT

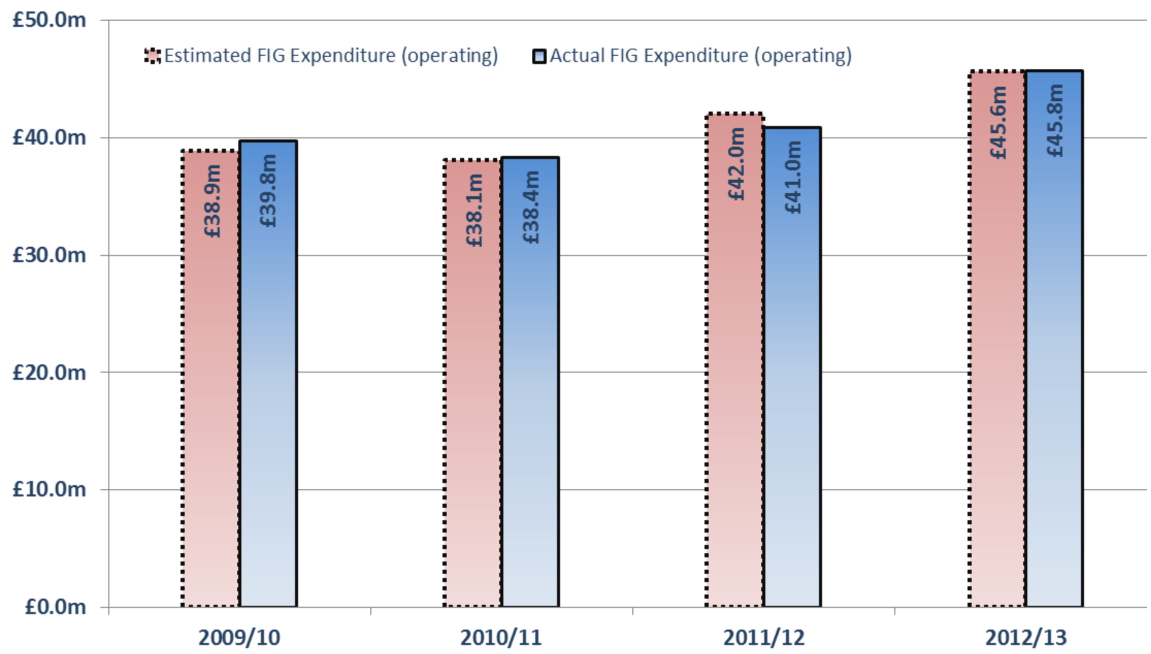
The FIG budget in 2012/13 was c. £54m; Figure 3.4 shows how the budget was proportionally divided across government. Health & Education is proportionally where most FIG funds are dedicated, with one quarter of the budget assigned to these two directorates.

FIGURE 3.4 – FIG OPERATING BUDGET 2012/13



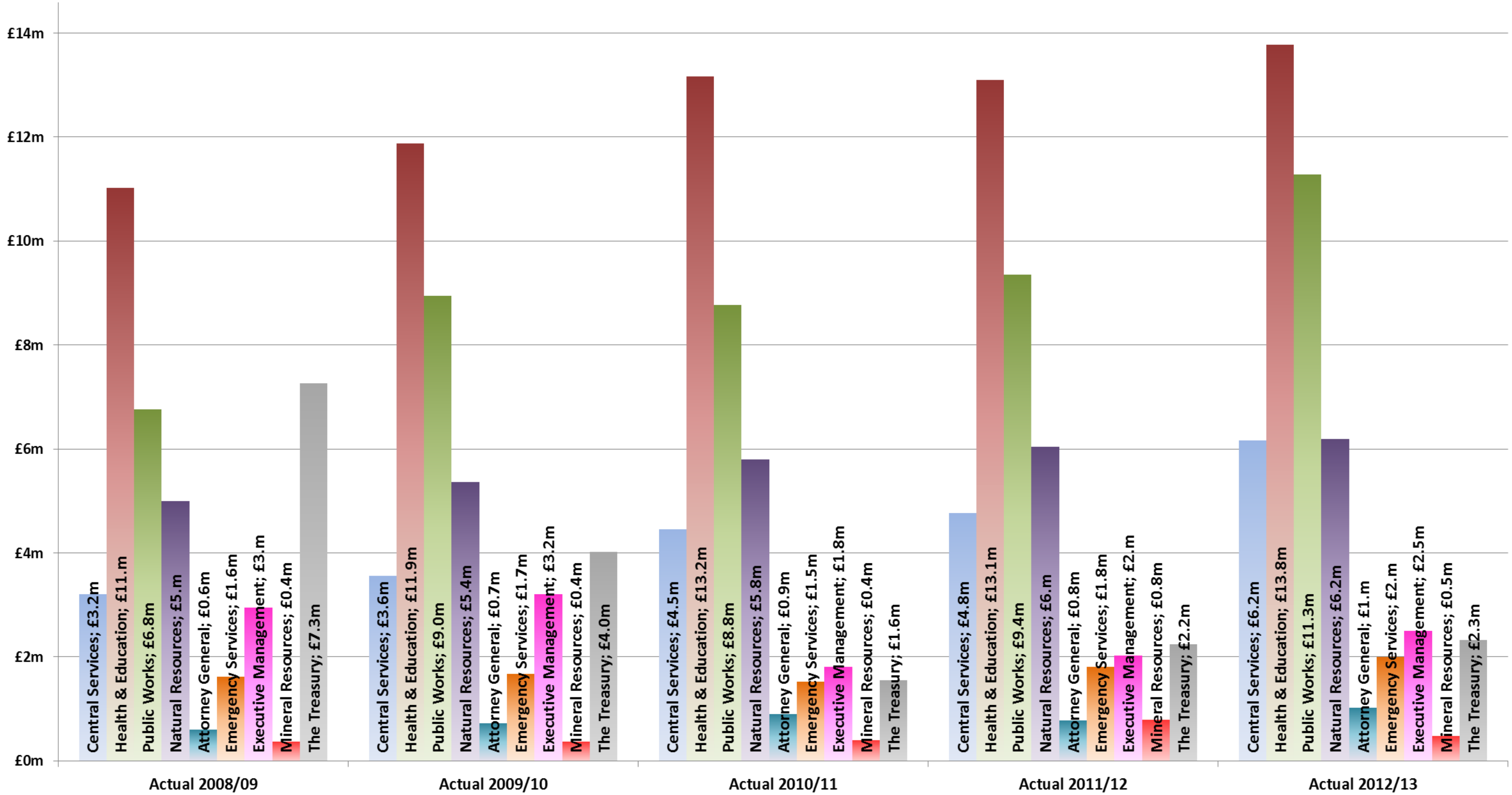
During 2012/13 there was an overall underspend within government, FIG spent roughly 93% of its estimated budget during 2012/13. Figure 3.5 compares the levels of government operating expenditure to original operating estimates from 2009 to 2013.

FIGURE 3.5 – FIG CORPORATE OPERATING EXPENDITURE[26] (ACTUAL VS. ESTIMATED)



[26] Departmental operating expenditure only, funds transfers & transfer payments have not been included.

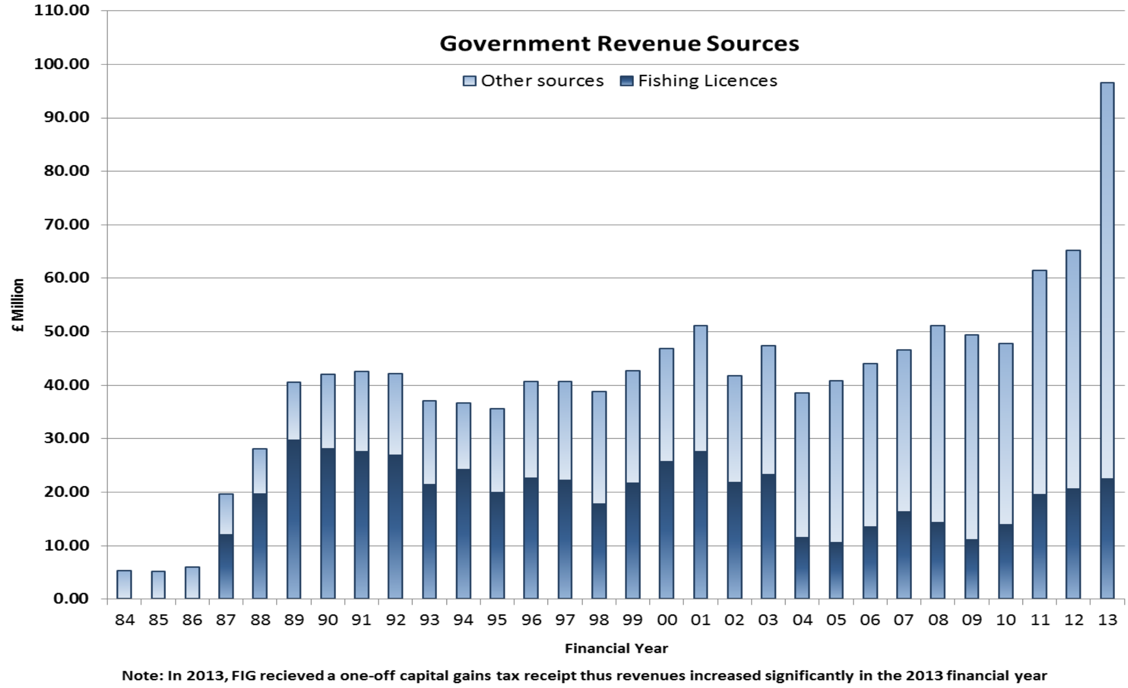
FIGURE 3.6 - GOVERNMENT OPERATING EXPENDITURE (ACTUAL) BY DEPARTMENT



*In 2008/9 the operating expenditure for the Treasury was unusually high due to investment losses (totalling £5.9m) as a result of the global financial crisis.

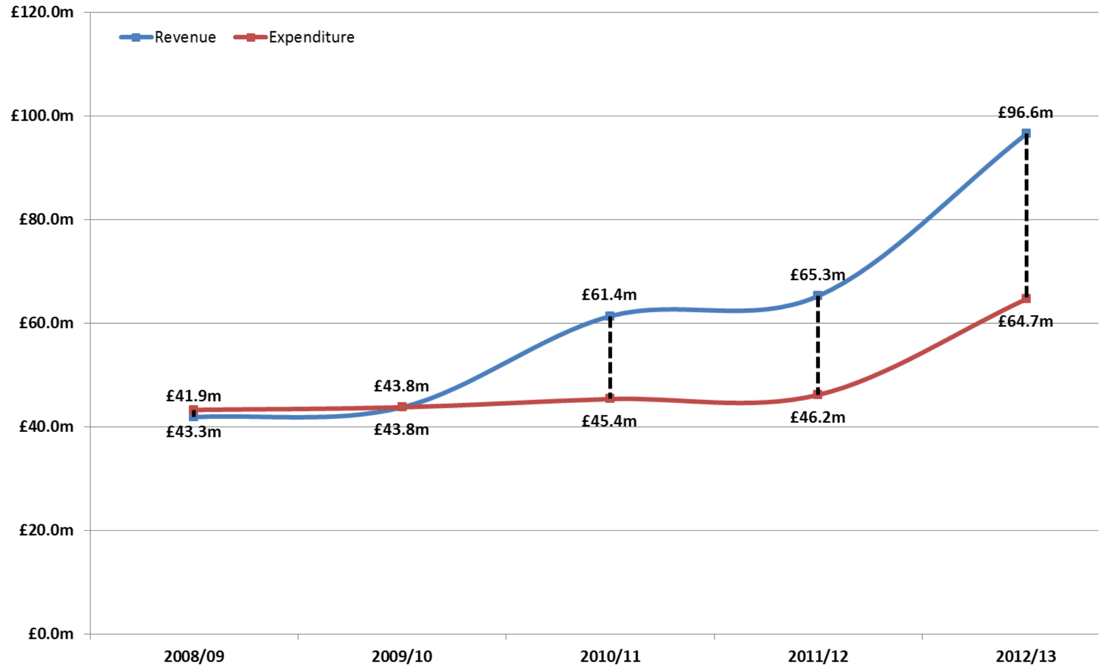
Figure 3.7 details FIG revenue since 1984, as can be seen revenue sources are highly dependent on Fishing Licences, therefore fishing seasons can have a significant impact on the revenues collected. In 2013, FIG received a one-off capital gains tax receipt relating to oil activities thus increasing revenues significantly during 2013.

FIGURE 3.7 – GOVERNMENT REVENUE



As Figure 3.8 shows, Government expenditure has not exceeded revenue since 2008/09; this was due to investment losses which were a result of the global financial crisis during this year. There have been noteworthy surpluses witnessed since 2010/11. As mentioned previously, there was an unusually large surplus in 2012/13 due to the one-off capital gains tax receipt received.

FIGURE 3.8 – GOVERNMENT REVENUE & OPERATING EXPENDITURE 2008-2013



RETAIL PRICE INDEX (RPI) & INFLATION

Consumer prices have increased steadily (CAGR = 4% p.a.) on an annual basis since the Retail Price Index (RPI) was re-based in 1999. There has been considerable fluctuation in price levels with prices going down on a few occasions. This is highlighted in Figure 3.9 and Table 3.4. The annual fluctuations are exaggerated in Figure 3.9 as they are plotted on the secondary axis (% change), unlike the overall annual RPI figure.

FIGURE 3.9 – RPI HISTORY

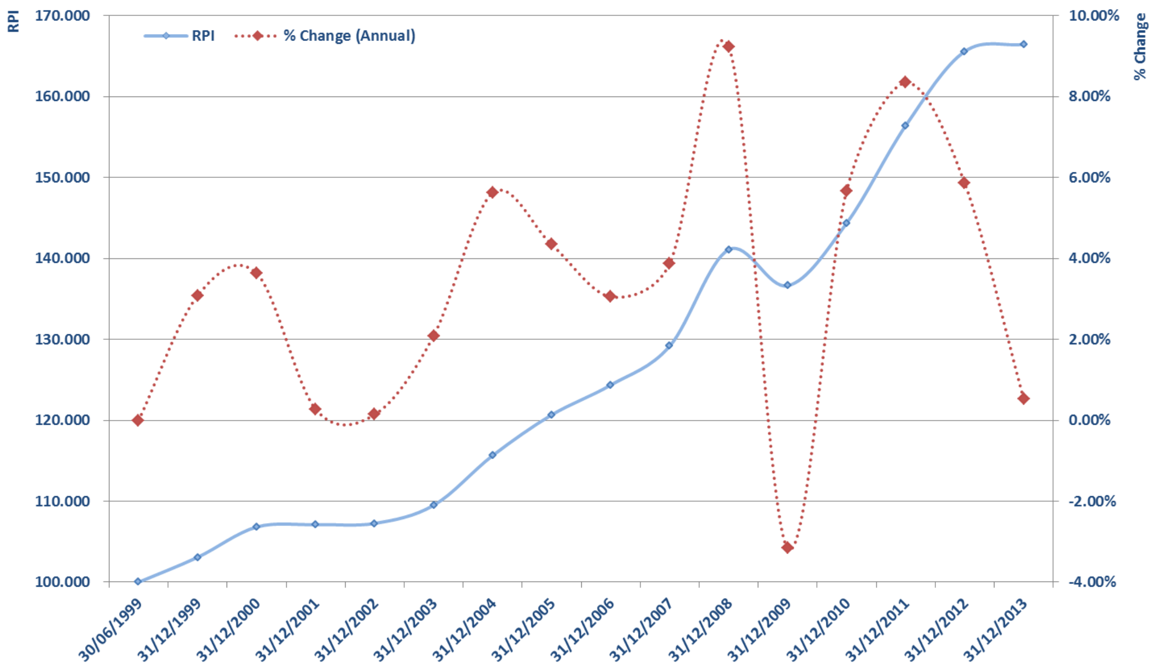


TABLE 3.4 – RPI HISTORY[27]

YEAR	Q1	Q2	Q3	Q4	% CHANGE
1999	*	100	99.15	103.08	**3.08%**
2000	104.27	104.39	106.15	106.82	**3.63%**
2001	106.52	106.6	107.05	107.11	**0.27%**
2002	106.27	108.01	108.41	107.26	**0.14%**
2003	108.43	108.13	109.04	109.5	**2.09%**
2004	109.57	111.63	113.00	115.65	**5.62%**
2005	116.75	117.00	119.89	120.67	**4.34%**
2006	122.00	123.16	124.32	124.35	**3.05%**
2007	124.26	124.75	126.1	129.16	**3.87%**
2008	130.23	134.34	140.16	141.08	**9.23%**
2009	137.11	137.19	136.83	136.62	**-3.16%**
2010	137.55	140.7	143.4	144.36	**5.67%**
2011	147.78	153.08	154.03	156.4	**8.34%**
2012	159.08	161.36	162.29	165.56	**5.86%**
2013	165.01	165.5	166.43	*	**0.53%**

*No data due to re-basing or changes to the RPI basket

[27] RPI was rebased in Quarter 1 1999 and a specific basket of goods was monitored from this point until Q3 2013. The current basket of goods used by FIG was introduced and RPI was re-based to 100.00 after 30/09/2013 and is not included in this report.

IMPORTS & EXPORTS[28]

Figure 3.10 shows that the majority of imports were loaded in the UK (87%), only a small fraction of goods are loaded elsewhere in Europe (<1%). The remaining goods come from South America, specifically; Uruguay and Chile which provide a combined 13% of imported goods.

FIGURE 3.10 – IMPORTS BY PLACE OF LOADING

TABLE 3.5 – IMPORTS BY PLACE OF LOADING

COUNTRY OF LOADING	VALUE OF GOODS		% OF ALL IMPORTS
UK	£	29,693,638.06	87%
URUGUAY	£	1,954,228.28	6%
CHILE	£	2,289,094.89	7%
EC & OTHER	£	105,056.05	<1%
TOTAL	£	34,042,017.28	100%

Table 3.6 details a selection of imported goods from 2008 to 2012. Diesel is by far the largest import by value, with a total value of almost £5 million in 2012. The value of diesel imported has been increasing steadily since 2008, with a compound annual growth rate (CAGR) of almost 10%, the volume of diesel imported has also increased by almost 46% since 2008. The volume of kerosene and paraffin imported witnessed a steady decline between 2008 and 2011 but 2012 saw a 20% increase on the previous year's volume. The value of petrol imported has seen a CAGR of 13% yet the volume of petrol reduced annually at an average rate of 4%, which would signify an increase in the cost of petrol imported.

[28] FIG Customs & Immigration Statistics 2012: All import values are expressed as CIF (cost, insurance and freight).

TABLE 3.6 – SELECTED IMPORTED GOODS BY VALUE FKP£ (INC. CIF): 2008 - 2012[29]

IMPORTED GOODS	2008	2009	2010	2011	2012
PASSENGER VEHICLES & CARS	£1.15m	£0.98m	£1.34m	£1.32m	£1.48m
DIESEL	£3.39m	£2.35m	£2.96m	£3.89m	£4.93m
PETROL	£0.10m	£0.13m	£0.15m	£0.22m	£0.16m
AVGAS	£0.24m	£0.17m	£0.29m	£0.26m	£0.20m
KEROSENE AND PARAFFIN	£1.67m	£1.03m	£1.25m	£1.66m	£1.69m
BEER AND LAGER	£0.42m	£0.43m	£0.48m	£0.54m	£0.40m
WINES	£0.13m	£0.19m	£0.15m	£0.29m	£0.19m
SPIRITS	£0.12m	£0.12m	£0.13m	£0.14m	£0.14m
CIGARETTES	£0.11m	£0.06m	£0.09m	£0.11m	£0.07m
POTATOES	£0.07m	£0.03m	£0.08m	£0.05m	£0.08m

The number of cigarettes imported in 2012 was the lowest volume imported in 5 years; this has also been reflected in the volume of alcohol imported in 2012.

TABLE 3.7 – IMPORTED GOODS BY VOLUME

	2008	2009	2010	2011	2012
PASSENGER VEHICLES & CARS (UNITS)	111	75	141	121	149
DIESEL (LITRES)	7,436,210	7,319,906	7,076,507	6,943,071	8,274,700
PETROL (LITRES)	234,277	246,864	249,596	274,322	200,185
AVGAS (LITRES)	297,990	225,020	225,429	188,600	182,100
KEROSENE AND PARAFFIN (LITRES)	2,855,769	2,841,300	2,780,476	2,692,755	3,223,218
BEER AND LAGER (LITRES)	359,716	355,991	335,998	387,580	322,143
WINES (LITRES)	64,092	93,078	60,856	113,129	57,931
SPIRITS (LITRES)	21,331	20,344	24,861	20,088	21,502
CIGARETTES (KILOS)	3,197	1,377	2,195	2,598	1,150
POTATOES (KILOS)	77,680	39,298	96,385	77,876	92,649

The export figures for fish are based on catch by Falkland flagged vessels. A minimal proportion of the fish may stay within the Islands but this is marginal. The figures below give an accurate indication of the amount and value of fish caught in Falkland Island water and exported. As Table 3.8 and Figure 3.11 show, 2012 was strong year for fishing with squid and finfish catches valued at almost £185m. Table 3.8 and Figure 3.11 demonstrate how volatile the industry can be with the range of catch between 2009 and 2012 being 44,600 tonnes, the value of fish exported between this period ranged from £76.4m to £184.5m (a difference of £108m).

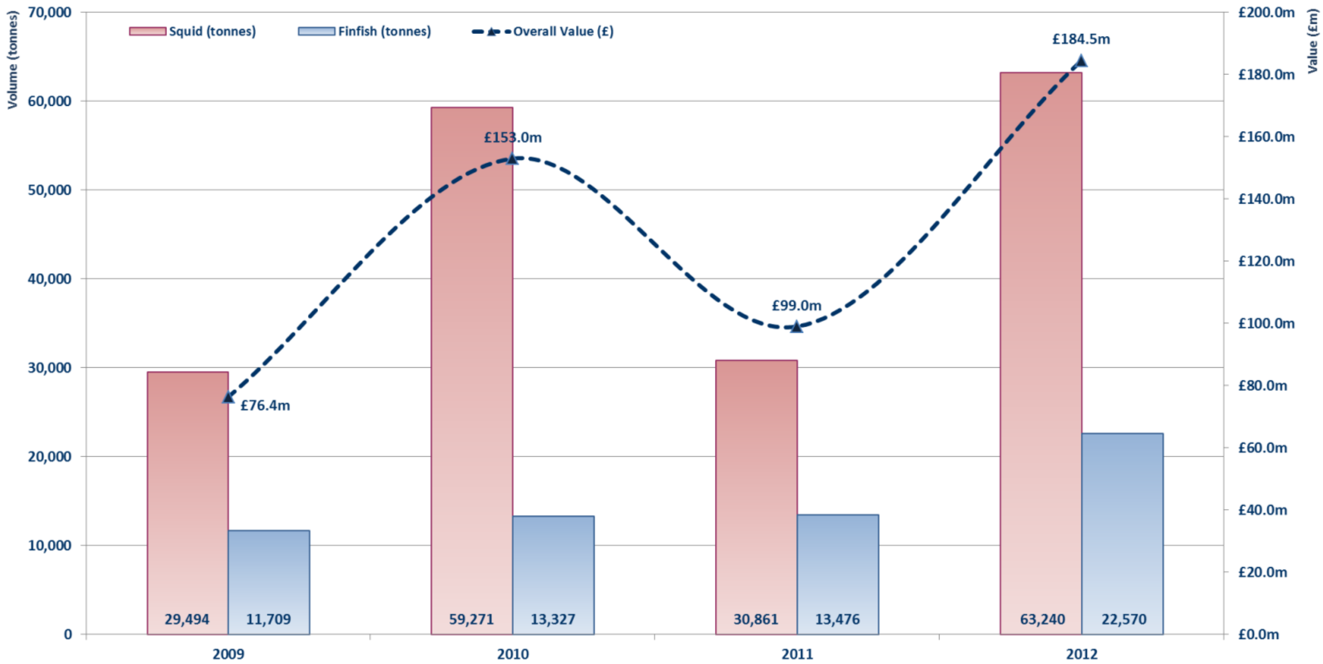
TABLE 3.8 – FISH EXPORTS[30]: BASED ON CATCHES BY FALKLAND FLAGGED VESSELS

	2009		2010		2011		2012	
	TONNES	VALUE	TONNES	VALUE	TONNES	VALUE	TONNES	VALUE
SQUID	29,494	£46.6m	59,271	£119.0m	30,861	£63.3m	63,240	£126.9m
FINFISH	11,709	£29.8m	13,327	£34.0m	13,476	£35.7m	22,570	£57.6m

[29] These are selected imports of public interest which Customs & Immigration publish as part of their Annual Statistics.

[30] FIG Customs & Immigration Statistics 2012

FIGURE 3.11 - FISH EXPORTS: BASED ON CATCHES BY FALKLAND FLAGGED VESSELS



The figures in Table 3.9 detailing wool production are also based on total wool produced and, similar to fish, the vast majority is exported from the Islands, with an extremely small quantity remaining on the Islands. The figures below provide a strong indication of the value and volume of wool exported on an annual basis since 2008. Based on the estimated prices the data in Table 3.9 shows that the price of wool decreased in 2012 and continued to decrease in 2013. Although the volume of wool produced increased by 3% the value of the wool experienced a 4% decrease in 2013.

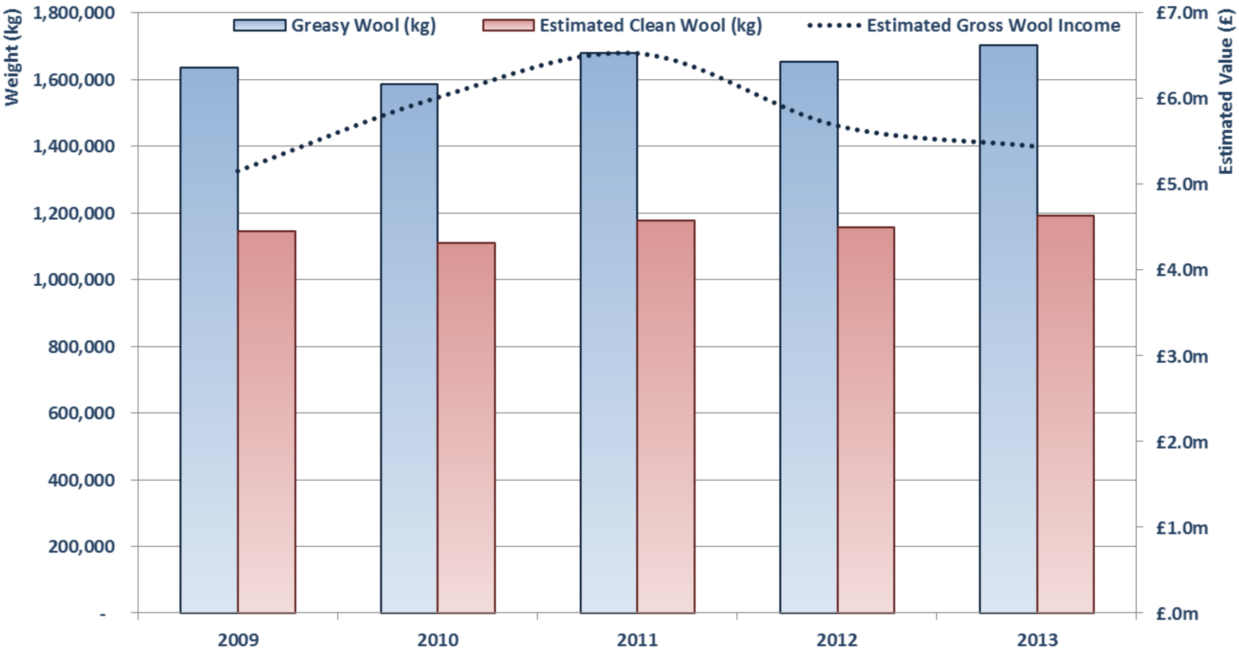
TABLE 3.9 – WOOL EXPORTS ESTIMATES[31]

	2009	2010	2011	2012	2013
GREASY WOOL (KG)	1,636,845	1,587,207	1,681,804	1,653,604	1,705,709
ESTIMATED CLEAN WOOL (KG)	1,145,792	1,111,045	1,177,263	1,157,523	1,193,996
ESTIMATED GROSS WOOL INCOME	£5.2m	£6.0m	£6.5m	£5.7m	£5.4m

NOTE: THE EXACT VOLUME OF WOOL EXPORTED IS NOT STATED ABOVE BUT IT IS ASSUMED ALL ALMOST ALL WOOL PRODUCED IN THE FALKAND ISLANDS IS EXPORTED.

[31] Agricultural Production 1996/2013 – Report for Agricultural Advisory Committee (12th June 2014) – Note: The value of wool is based on international market estimates and is not representative of actual income received. The estimated proportion of clean wool is the same for each year (70%).

FIGURE 3.12 – WOOL EXPORTS ESTIMATES



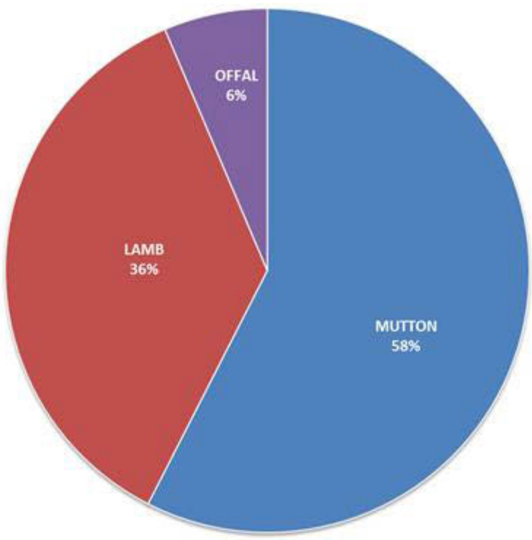
The data in Table 3.10 shows that the export of mutton and offal increased in 2012, whereas the amount of lamb and beef decreased. This may be in part due to increased demand within the domestic market, thus reducing the volume of meat available for export. Figure 3.13 shows that 94% of meat exported in 2013 was lamb or mutton.

TABLE 3.10 – MEAT EXPORTS

	2010	2011	2012	2013
MUTTON (kg)	214,000	222,000	253,000	432,000
LAMB (kg)	133,000	201,000	186,000	271,000
BEEF (kg)	14,000	NO BEEF EXPORTED	NO BEEF EXPORTED	NO BEEF EXPORTED
OFFAL (kg)	24,000	28,000	33,000	48,000
VALUE (£FKP)	£1.2m	£2.2m	£2.2m	NOT AVAILABLE

*DOES NOT INCLUDE MEAT EXPORTED DIRECTLY TO FISHING VESSELS.

FIGURE 3.13 – MEAT EXPORTS 2013



PASSENGER ARRIVALS AND DEPARTURES[32]

The number of arrivals by air increased for the fourth year running in 2012, the arrivals by sea increased for the third year running. The total (air & sea) number of arrivals has increased by 45% since 2008. This increase is due in part to the increased numbers of visitors involved in the oil and gas industry. It also due to number of land based tourists increasing significantly since 2008, with an annual growth rate of 29%, which is encouraging and supports the tourism related objectives outlined in the Tourism Development Strategy (TDS) and Economic Development Strategy (EDS). The increased number of the tourists arriving by air during 2012 was also related to the 30th Anniversary of the Falklands War which took place during this year.

TABLE 3.11 - ARRIVALS BY AIR

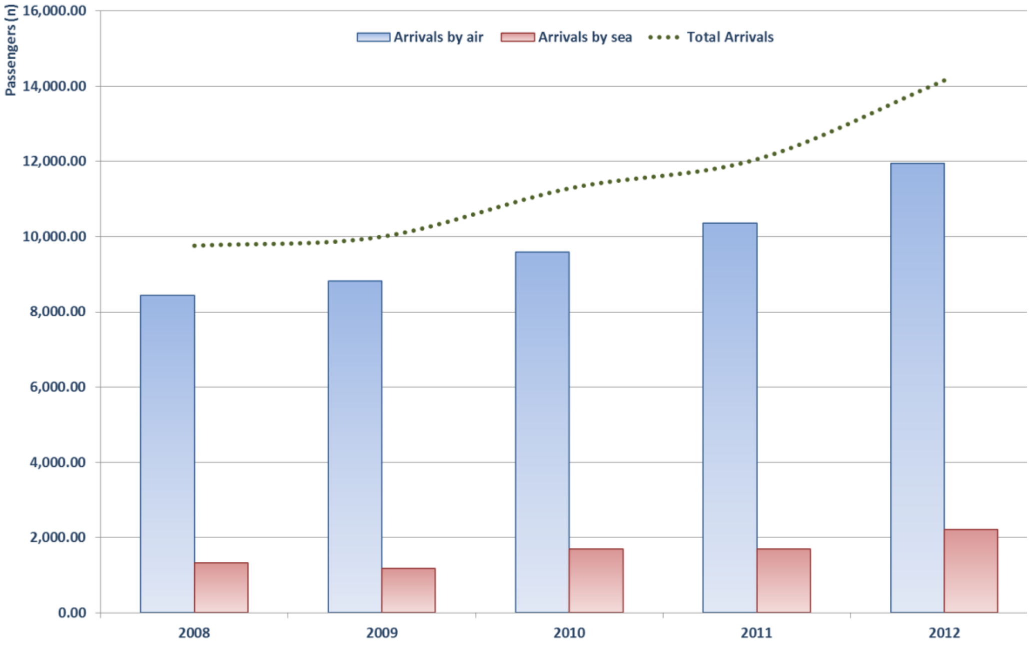
TYPE OF PASSENGER	2008	2009	2010	2011	2012
RESIDENT	1,925	1,683	1,613	1,590	1,733
TEMPORARY RESIDENT (MOD/FIG OTHER)	2,173	2,293	2,356	2,270	2,275
VISITOR BUSINESS	1,300	1,399	1,221	1,152	1,587
VISITOR PRIVATE[32]	719	-	-	-	-
CREW IN TRANSIT	782	660	812	944	1,280
TRANSIT - BRITISH ANTARCTIC SURVEY	183	244	177	258	260
FAMILY VISIT MOD	564	476	375	276	310
VISITING FRIENDS / RELATIVES	144	266	238	228	322
MILITARY ON REST & RECUPERATION	14	56	39	35	23
HOLIDAY / TOURISM	582	1,635	950	938	1,462
TRANSIT OIL	-	-	1,703	2,562	2,592
FIS - NON RESIDENT	51	104	108	103	97
TOTALS	8,437	8,816	9,592	10,356	11,941

TABLE 3.12 – ARRIVALS BY SEA[33]

TYPE OF PASSENGER	2008	2009	2010	2011	2012
RESIDENT	17	21	33	26	27
TEMPORARY RESIDENT (MOD/FIG/OTHER)	16	13	14	16	11
VISITOR BUSINESS	21	27	12	25	34
VISITOR PRIVATE[34]	129	-	-	-	-
CREW IN TRANSIT	854	563	894	1,054	1,270
TRANSIT - BRITISH ANTARCTIC SURVEY	157	176	216	277	288
FAMILY VISIT MOD	-	-	-	-	-
VISITING FRIENDS / RELATIVES	-	2	4	-	3
MILITARY ON REST & RECUPERATION	-	3	-	-	-
HOLIDAY / TOURISM	128	378	340	199	335
TRANSIT OIL	-	-	1	3	3
FIS - NON RESIDENT	-	-	177	100	242
TOTALS	1,322	1,183	1,691	1,700	2,213

[32] FIG Customs & Immigration Statistics 2012
[33] These figures do not include cruise ship arrivals.
[34] 'Private visitor' was discontinued in 08/09 and replaced by 'visiting friends/relatives' and 'holiday tourism' to provide greater accuracy when classifying visitors.

FIGURE 3.14 – PASSENGER ARRIVALS & DEPARTURES



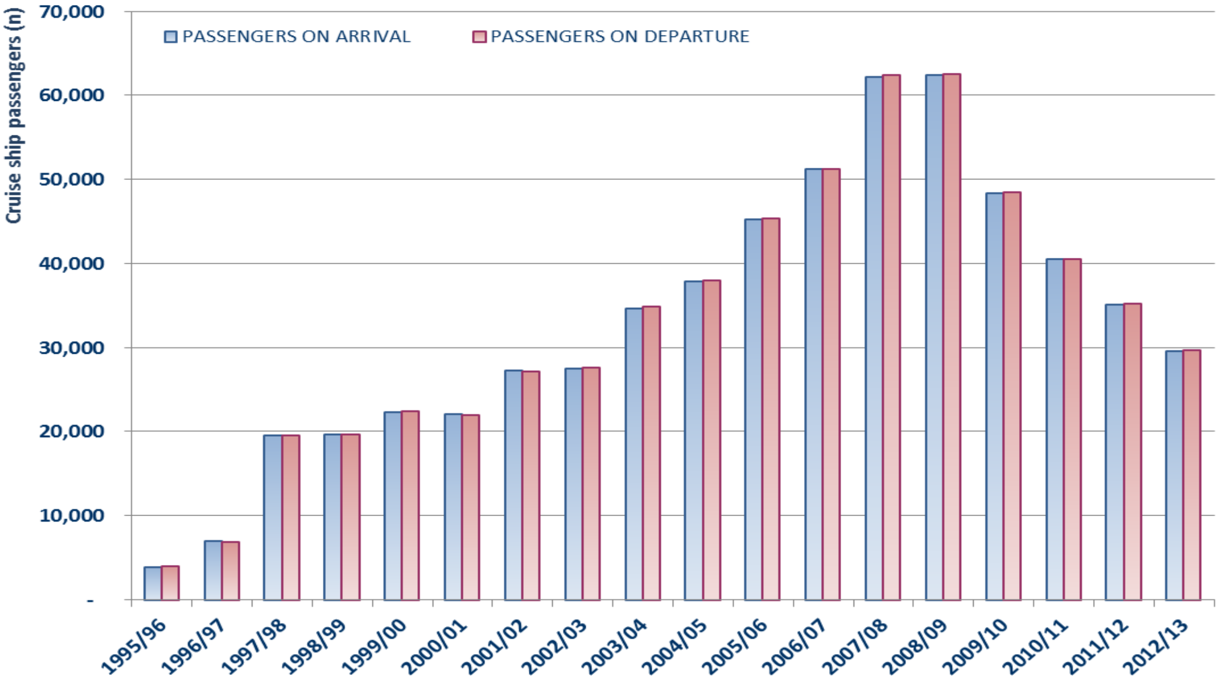
The number of arrivals on cruise ships has declined in the last two years, with 2012/13 witnessing a 16% decrease in the number of cruise visitors since 2011/12. One of the main reasons for the decline in 2012/13 was due to poor weather conditions, meaning passengers could not disembark or vessels had to avoid the Falkland Islands. Due to the weather conditions, 12,915 passengers could not visit the Islands, which equated to almost £164,000 in lost passenger taxes and an estimated £740,000 in passenger spending.

TABLE 3.13 – CRUISE SHIP VISITS 2012/13[35]

SEASON	PASSENGERS ON ARRIVAL	PASSENGERS ON DEPARTURE	VISITS
1995/96	3,940	3,947	26
1996/97	7,008	6,840	34
1997/98	19,523	19,613	48
1998/99	19,638	19,705	55
1999/00	22,370	22,396	65
2000/01	22,125	21,929	54
2001/02	27,230	27,127	62
2002/03	27,461	27,661	68
2003/04	34,691	34,927	84
2004/05	37,880	38,019	84
2005/06	45,229	45,332	93
2006/07	51,282	51,278	98
2007/08	62,203	62,489	109
2008/09	62,485	62,526	105
2009/10	48,420	48,487	92
2010/11	40,542	40,561	71
2011/12	35,159	35,283	80
2012/13	29,553	29,709	66

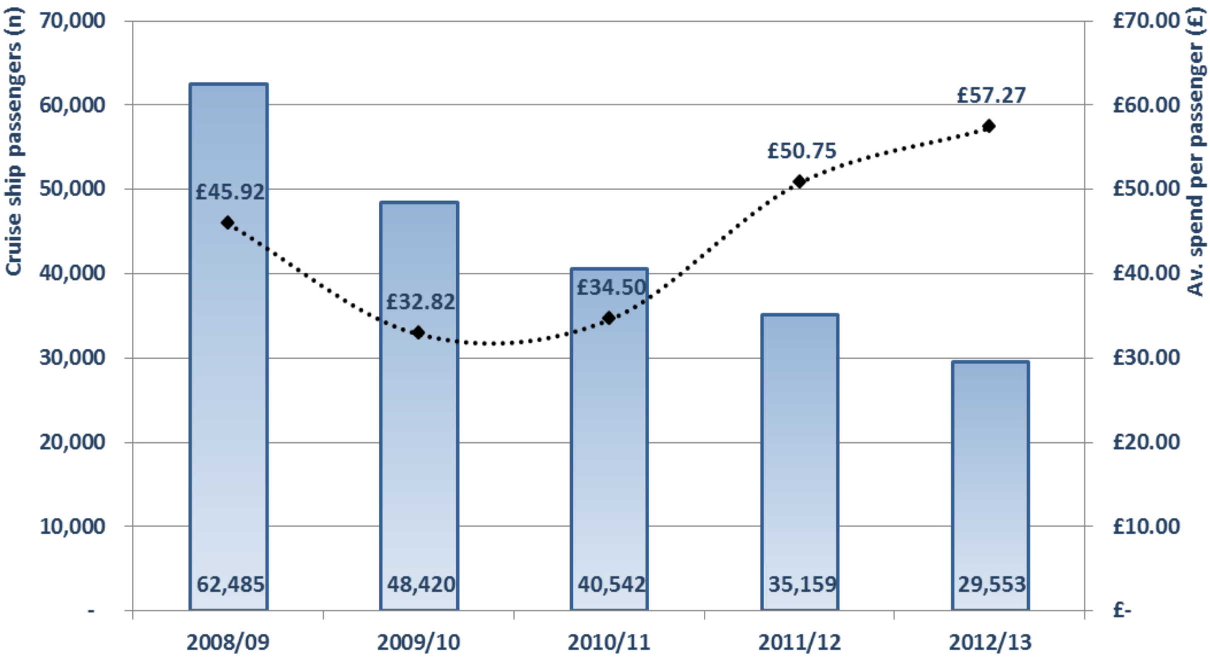
[35] Falkland Islands Tourist Board (2013): Tourism Statistics 2012

FIGURE 3.15 – NUMBER OF CRUISE SHIP PASSENGERS[36]



Although there has been a decline in passenger numbers in the last five years, the average spend per passenger has seen an annual growth rate of around 5.7%, despite total passenger numbers decreasing by -17% on average during the same period.

FIGURE 3.16 – AVERAGE SPEND PER CRUISE SHIP PASSENGER[36]



[36] Falkland Islands Tourist Board (2013): Tourism Statistics 2012

INCOME & EMPLOYMENT

The income figures (median & average incomes) are based on the Census 2012; there is no data available to update the figures detailed in Table 3.14. The Falkland Islands minimum wage was adopted and implemented in 2013 and it is now a legal requirement for all employers to pay the hourly rate (or the equivalent depending on benefits provided such as accommodation and food).

Figure 3.17 shows that the average wage in the Falkland Islands is almost 30% lower than in the UK but it is on a par or higher than a number of OECD countries such as Spain and Italy.

TABLE 3.14 - INCOME

	ANNUAL INCOME GROSS	HOURLY INCOME GROSS
MINIMUM WAGE (ADULT)[37]	£10,500	£5.05
AVERAGE WAGE[38]	£23,000	£11.06
MEDIAN WAGE[38]	£17,500	£8.41

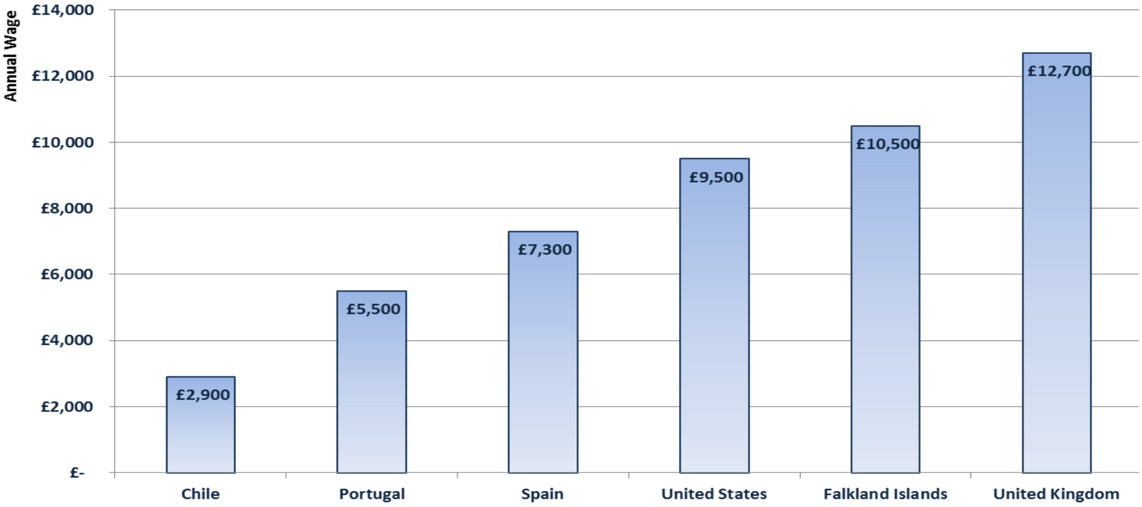
FIGURE 3.17 – AVERAGE WAGE COMPARED TO OECD COUNTRIES (2012)[39]

Figure 3.18 compares the annual minimum wage in the Falkland Islands with other OECD. The Falkland Islands minimum wage is higher than in a number of OECD countries. It is 17% lower than in the UK but it is higher than in the USA (by almost 11%), Spain (by 44%), Portugal (by 91%) and it is almost 3.5 times higher than in Chile.

The average and minimum wages have been compared directly with other nations without parity. The current prices were converted from the National Currency Unit (NCU) to £GBP and the cost of living in each of the countries has not been factored in.

[37] Based on current Falkland Islands Minimum Wage Legislation: Adopted 1st December 2013
[38] Estimates based on salary mid-points stated in Census 2012
[39] OECD Average Annual Wages 2012 - OECD Statistics: http://stats.oecd.org. The figures stated have been converted from $US Dollars based on the 2012 average exchange rate ($US - £GBP)

FIGURE 3.18 – ANNUAL MINIMUM WAGE COMPARED TO OECD COUNTRIES



The Gini Coefficient[40] is often used to measure the distribution of wealth and is universally accepted as an indicator for income inequality. Based on aggregated household income[41] mid-points from the Census 2012, Falkland Islands Gini Coefficient is 0.38, before taxes and 0.36 after taxes. These indices show that income is distributed relatively evenly across the population. Figure 3.19 compares the Falkland Islands Gini Coefficient with other OECD countries.

FIGURE 3.19 – GINI COEFFICIENT COMPARED TO OECD[42] COUNTRIES (PRE AND POST TAXES & TRANSFERS)[43]

[40] Gini Coefficient is used to establish how wealth is distributed within a population. The Gini Coefficient is a number between '0'and '1', and the closer the number is to '0' the more evenly distributed wealth is amongst the population, therefore '0' corresponds with perfect equality.

[41] Household incomes from the Census have been equivalised according to the OECD Square Root Equivalence Scale; therefore household income is weighted and reflects household size.

[42] OECD (2014): OECD Income Distribution and Poverty, 2011, http://stats.oecd.org

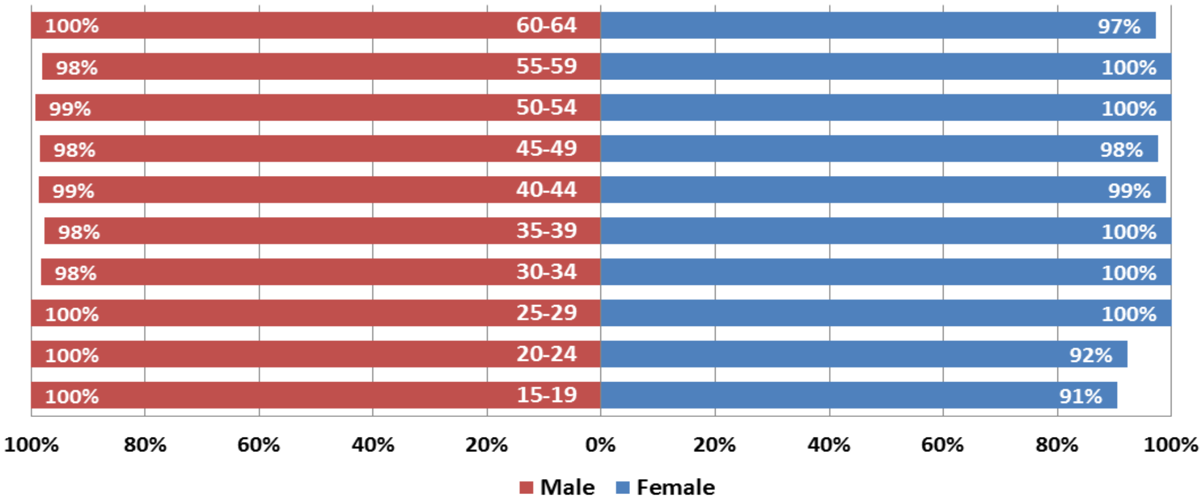
[43] Taxes and Transfers include Income Tax deductions, Medical Service Tax deductions and State Pension deductions. Social Welfare and benefits received have not been included in the calculation.

There is almost 'full' employment within the Falkland Islands currently and there is very little available labour capacity with unemployment rates below 1% of the labour force. The majority of people in employment are *employees* (87%) and 13% of people in employment are *self-employed*.

TABLE 3.15- ECONOMICALLY ACTIVE[44]

EMPLOYMENT STATUS	MALE	FEMALE	% OF WORKING AGE POPULATION	TOTAL
EMPLOYED	1089	831	**82.5**	1920
EMPLOYEES	*938*	*739*	*72.0*	*1677*
SELF-EMPLOYED	*150*	*91*	*10.4*	*241*
DID NOT SPECIFY	*1*	*1*	*0.1*	*2*
UNEMPLOYED	12	12	**1.0**	24
TOTAL ECONOMICALLY ACTIVE	**1101**	**843**	**83.5**	**1944**

FIGURE 3.20 – ECONOMICALLY ACTIVE IN EMPLOYMENT BY AGE



As Table 3.15 and Figure 3.20 show there is very little unused capacity amongst people of working age who are economically active.

Labour force participation[45] gives an indication of how many people within each age group are willing or able to work, shown in Table 3.16. The overall labour force participation for the Falkland Islands is 91%; this is extremely high and is much higher than UK and Chile (62%)[46]. When broken down by sex the labour participation rate for females is 86% and 95% for males which are significantly higher than the world averages of 51% and 77% respectively.

[44] Economically active is based on respondents who stated they were employed or unemployed (but able or seeking work) in the Census 2012. Therefore people who are; retired and not working, studying full time and not working, unable to work for health or other reasons and unemployed and not seeking work are excluded from the economically active population.

[45] The labour force participation rate is calculated as the labour force during a given reference period given as a percent of the working-age population in the same reference period.

[46] World Bank 2012: Labor force participation rate, total (% of total population ages 15+) (modeled ILO estimate) | Data | Table 2012

FIGURE 3.21 – LABOUR FORCE PARTICIPATION BY AGE

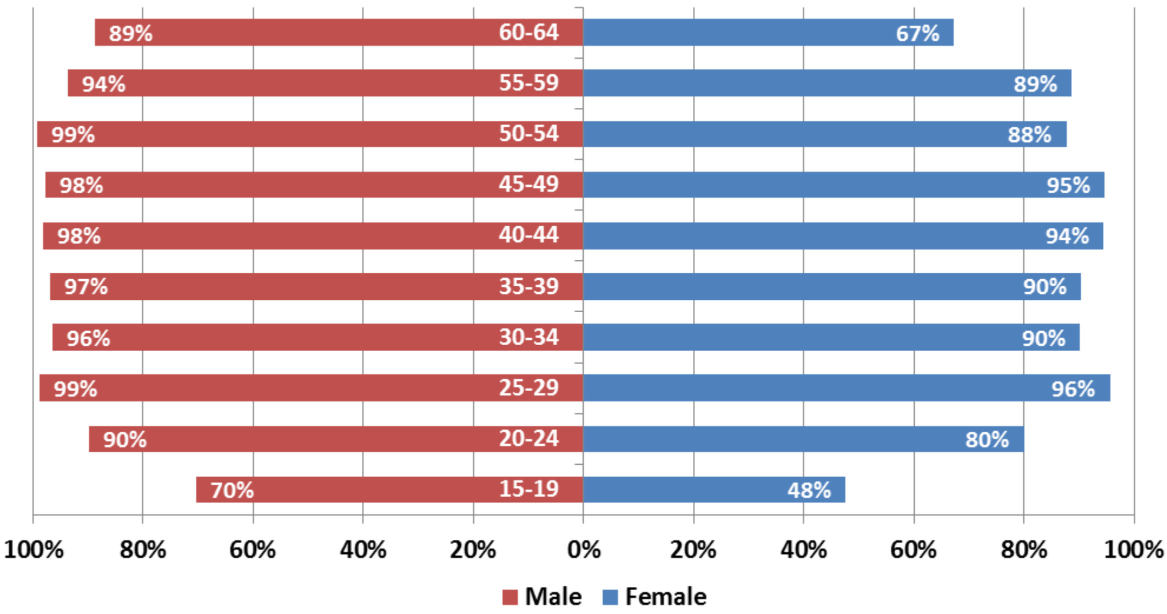


TABLE 3.16 – LABOUR FORCE PARTICIPATION BY AGE

AGE BANDS	LAB. FORCE PARTICIPATION (FEMALE)	LAB. FORCE PARTICIPATION (MALE)	LAB. FORCE PARTICIPATION (TOTAL)
15-19	0.48	0.70	0.58
20-24	0.80	0.90	0.85
25-29	0.96	0.99	0.97
30-34	0.90	0.96	0.94
35-39	0.90	0.97	0.94
40-44	0.94	0.98	0.97
45-49	0.95	0.98	0.96
50-54	0.88	0.99	0.94
55-59	0.89	0.94	0.92
60-64	0.67	0.89	0.81
TOTAL	0.86	0.95	0.91

Table 3.17 shows the number of hours worked (banded) split by sex. As can be seen females tend to make up the majority of people in employment who work less than 35 hours per week.

TABLE 3.17 – HOURS WORKED[47]

HOUR BANDS (PER WEEK)	MALE	FEMALE
01-14	32%	68%
15-29	18%	82%
30-34	32%	68%
35-39	55%	45%
40-48	64%	36%
49+	66%	34%
NOT STATED	47%	53%

[47] Figures based on Census 2012 records, the hours stated could relate to more than one job.

The majority of people in employment work between 40-48 hours, with an average working week in the Falkland Islands being 44.65. Table 3.18 shows that people who work in the 'Hospitality' sector work the longest hours, people employed in this sector work over 50 hours per week on average. The 'Tourism' sector has one of the shortest working weeks (33 hours) but this could be due to the seasonal and casual nature of some of the activities in this sector.

TABLE 3.18 – HOURS WORKED BY ECONOMIC SECTOR

ECONOMIC SECTOR	AVERAGE WORKING HOURS (PER WEEK)
ADMINISTRATION & SUPPORT SERVICE ACTIVITIES	49.74
AGRICULTURE	49.20
ART, ENTERTAINMENT & RECREATION	31.75
BUSINESS SERVICES	40.93
COMMUNICATION	41.71
COMMUNITY , SOCIAL AND PERSONAL SERVICES	42.56
CONSTRUCTION	45.92
ELECTRICITY, WATER AND GAS	48.99
FINANCE	41.39
FISHING	42.30
HOSPITALITY (HOTELS, RESTAURANTS, PUBS ETC.)	50.56
MANUFACTURING	41.96
MINING AND QUARRYING (INCLUDING OIL AND GAS EXPLORATION ACTIVITIES)	42.80
OTHER	59.50
PROFESSIONAL SCIENTIFIC AND TECHNICAL ACTIVITIES	41.25
PUBLIC SERVICE (FIG)	39.56
PUBLIC SERVICE (MOD)	43.94
PUBLIC SERVICE (OTHER)	42.43
TOURISM	33.73
TRANSPORT AND STORAGE	47.51
WHOLESALE AND RETAIL TRADE	41.09

Table 3.19 shows the number of limited liability companies registered from 2009-2013, in 2013 a total of 13 companies were registered which is a 5-year high. Although four companies were dissolved during 2013 the net increase of nine companies is also a 5-year high.

TABLE 3.19 – ANNUAL COMPANY REGISTRATION/DISSOLUTION[48]

COMPANIES	2009	2010	2011	2012	2013
REGISTERED	4	1	3	6	13
DISSOLVED	5	10	0	7	4
ANNUAL LOSS/GAIN	-1	-9	3	-1	9

[48] Figures based on FIG Registry – Companies Database. Figures only based on limited companies, excludes self-employed and partnerships.

4. SOCIETY

EDUCATION

There are two schools within the Falkland Islands; the Infant Junior School which teaches children between the ages of 4-11 and the Falkland Islands Community School which teaches children from the age of 12-16. Education between the ages of 4-16 is compulsory within the Falkland Islands and net enrolment, for both primary and secondary education was 100% in 2013. The net enrolment figures are higher than both world average and OECD averages. Although there are no further education facilities within the Falkland Islands, many students take the opportunity to study further and higher education overseas, mainly in the UK (often funded by FIG).

Table 4.2 compares teacher: pupil ratios in the Falkland Islands to other OECD nations. The number of primary school pupils compared to teachers in the Falkland Islands was higher than the UK, Chile and the OECD average in 2013; this is a contrast to the secondary education ratio, which is lower than any other of the comparator countries.

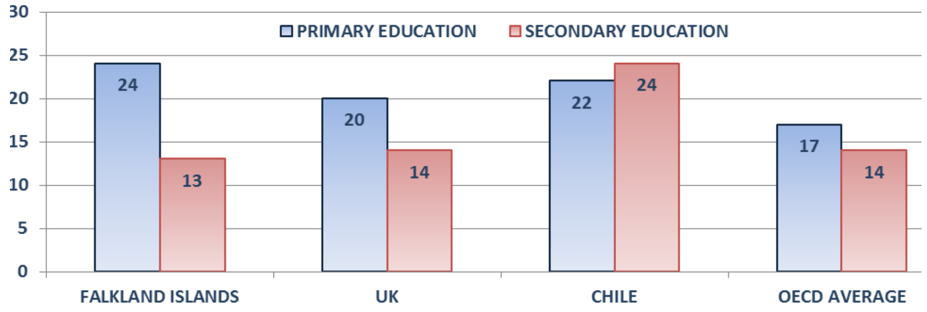
TABLE 4.1 – NO. OF PUPILS IN FALKLAND ISLANDS EDUCATION (2013)[49] AND GLOBAL COMPARISONS[50]

EDUCATION LEVEL	TOTAL NUMBER OF FI PUPILS (2013)	F.I. NET ENROLMENT % OF SCHOOL AGE POPULATION (2013)	WORLD AV. NET ENROLMENT % OF SCHOOL AGE POP.	OECD AV. NET ENROLMENT % OF SCHOOL AGE POP.
PRIMARY	254	100%	89%	96%
SECONDARY	157	100%	65%	87%
POST 16 (OVERSEAS)	48	N/A	N/A	N/A

TABLE 4.2 OECD COMPARISONS - TEACHERS: PUPILS RATIO IN PRIMARY & SECONDARY EDUCATION[51]

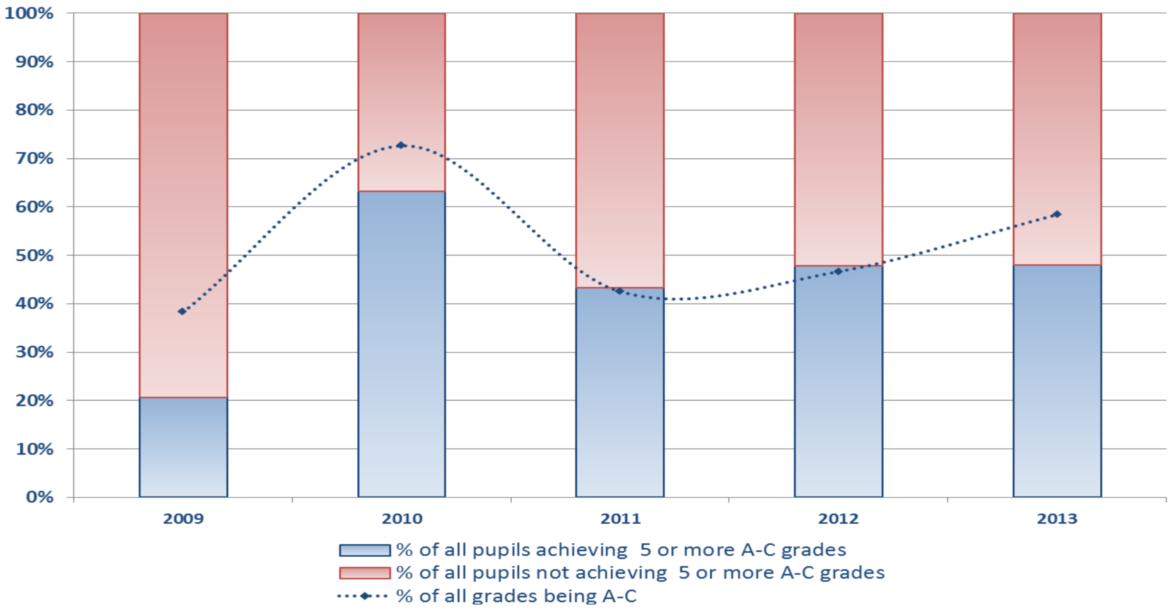
	FALKLAND ISLANDS[52]	UK	CHILE	OECD AVERAGE
PRIMARY EDUCATION	1:24	1:20	1:22	1:17
SECONDARY EDUCATION	1:13	1:14	1:24	1:14

FIGURE 4.1 – NUMBER OF PUPILS PER TEACHER (OECD COMPARISONS)



[49] FIG Education Dept. – *Annual Enrolment Figures*
[50] World Bank (2014): *School Enrolment (% net) (2012)* based on UNESCO Institute for Statistics Data. http://data.worldbank.org/indicator/SE.SEC.NENR/countries
[51] OECD – *Education at a Glance 2011: OECD Indicators OECD. UNESCO Institute for Statistics (World Education Indicators Programme (2009))*
[52] FIG Education Dept. – *Education Statistics (June 2013)*

FIGURE 4.2 – FICS GCSE RESULTS



The number of pupils achieving 5 or more A-C grades in 2012 was 48% which is slightly higher than the 5 year average (45%). The total percentage of all grades attained being between A-C was 58% in 2013, which is 6% higher than the 5 year average. Due to the size of year groups being small; a small number of students not achieving A-C can have a significant impact on the results for that particular year group and hence the number who qualify to study overseas.

TABLE 4.3 – EDUCATIONAL ATTAINMENT[53]

	2009	2010	2011	2012	2013
% OF ALL GRADES ATTAINED BEING A-C	38%	73%	43%	47%	58%
% OF ALL PUPILS ACHIEVING 5 OR MORE A-C GRADES	21%	63%	43%	48%	48%

TABLE 4.4 – PUPILS STUDYING OVERSEAS[54]

	2009	2010	2011	2012	2013
TOTAL PUPILS STUDYING OVERSEAS	51	59	54	44	48
FURTHER EDUCATION	21	29	32	22	19
HIGHER EDUCATION	30	30	22	22	29

Table 4.4 shows the number of students who have travelled overseas for further or higher education. On average over the last 5 years the number of students who study overseas has been 51. In 2013, the number of pupils studying overseas was less than the 5 year average but this figure can be impacted by the number of school leavers or pupils of the age to study overseas. The number of pupils studying abroad has been relatively consistent over the last 5 years.

[53] FIG Education Dept. – *Annual Exam Results* (2009 – 2013)

[54] FIG Education Dept. – *Students studying overseas* (Only students 16 or older study overseas i.e. college or university)

CRIME[55]

The number of incidents[56] in the 2012/13 reporting period has increased by 24% (1,037 to 1,282) since 2011/12, which has been attributed to improved reporting and recoding of information by Royal Falkland Islands Police (RFIP). The total of arrests in 2012 and 2013 were exactly the same with 64 arrests being made in each year.

TABLE 4.5 – NUMBER OF INCIDENTS REPORTED

	2009/10	2010/11	2011/12	2012/13
TOTAL NUMBER OF INCIDENTS	1,074	1,277	1,037	1,282

FIGURE 4.3 – NUMBER OF INCIDENTS 2009 - 2013

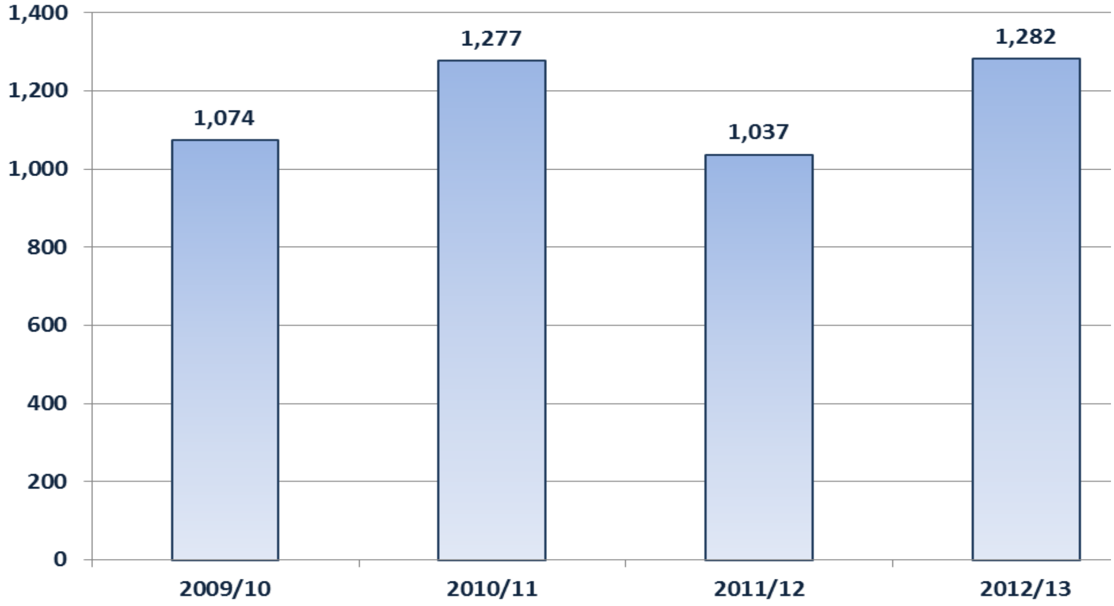


TABLE 4.6 – TOTAL NUMBER OF ARRESTS

	2011/12	2012/13
NUMBER OF PERSONS ARRESTED	64	64

The number of crimes[57] reported witnessed a 9% increase from 2011/12 – 2012/13 and there was also a rise in the percentage of violent and acquisitive crimes during the same period, with a 12% and 2% increase respectively. This has also been attributed to the development of proactive policing and the encouragement of victims reporting offences against the person.

TABLE 4.7 – CRIMES REPORTED

	2011/12	2012/13
CRIMES REPORTED	124	135

[55] Royal Falkland Islands Police: 2012/13 Annual Report to the Police Committee (16th January 2014)

[56] An incident is classed as "Any incident reported by a member of the public which does not constitute a crime" – Royal Falkland Islands Police.

[57] A crime is classed as "An action or omission which constitutes an offence and is punishable by law" – Royal Falkland Islands Police.

TABLE 4.8 – TYPES OF CRIME

CRIME BY CATEGORY	2011/12	2012/13
RAPE S1 SEXUAL OFFENCES ACT 2003	2	5
RAPE S1 SEXUAL OFFENCES ACT 1956	1	1
SEXUAL GROOMING S15 S.O.ACT 2003	1	1
SEXUAL ASSAULT S3 SEXUAL OFFENCES ACT 2003	2	2
SEXUAL ASSAULT S14 SEXUAL OFFENCES ACT 1956	0	1
SEXUAL ASSAULT OF CHILD UNDER 13 S7 SEXUAL OFFENCES ACT 2003	1	3
ASSAULT S39 CJA 1988	19	21
ASSAULT S47 OAP ACT 1861	3	12
ASSAULT S20 OAP ACT 1861	1	1
THEFT S1 THEFT ACT 1968	19	17
BURGLARY S9(1)(A)	0	1
BURGLARY S9(1)(B)	0	1
DECEPTION S15	0	5
OBTAINING A MONEY TRANSFER S15A	0	1
DECEPTION S1 THEFT ACT 1978	1	0
CRIMINAL DAMAGE S1(1) CDA 1971	18	22
FORGERY & COUNTERFEITING ACT 1981	8	0
PUBLIC ORDER S3 PO ACT 1986	0	3
PUBLIC ORDER S4 PO ACT 1986	0	3
PUBLIC ORDER S4A PO ACT 1986	5	1
CRIME & DISORDER ACT S31(1)	0	1
PUBLIC ORDER S5 PO ACT 1986	0	2
BREACH OF PROHIBITION ORDER	0	1
SUPPLYING ALCOHOL TO PROHIBITED PERSON	0	1
TAKING A CONVEYANCE	1	5
HARASSMENT S2 PFH ACT 1997	4	0
DRIVING OVER PRESCRIBED LIMIT	16	4
DRIVING WHILST UNFIT THROUGH DRINK S19(1) RTO 1948	2	3
ASSAULT ON POLICE S55 PO 2000	1	3
DRUNK AND INCAPABLE	1	1
DRUNK AND DISORDERLY	0	2
DRUNK IN CHARGE OF A VEHICLE	2	1
DRIVING WITHOUT INSURANCE	2	0
DRIVING UNLICENSED VEHICLE	3	0
CRUELTY TO ANIMALS	0	1
BREACH OF THE PEACE	0	2
BREACH OF BAIL	0	2
FAILING TO SUPPLY A SAMPLE OF BREATH	1	1
THREATS TO KILL S16 OAP 1861	3	2
POSSESSION OF AN OFFENSIVE WEAPON	1	2
BREACH OF BAIL S147 CJO	0	2
DRUNK & DISORDERLY	1	0
FALSE FIRE ALARM S42(1) CRIMES ORDINANCE	1	0
BREACH OF CONDITIONAL DISCHARGE	1	0
% OF CRIMES CLASSED AS VIOLENT	35%	47%
% OF CRIMES CLASSED AS ACQUISITIVE	16%	18%

HEALTH

The Falkland Islands is supported by one hospital; the King Edward Memorial Hospital which carries out a range of functions from GP, in-patient care, minor surgery and dentistry amongst others. Based on the figures below the number of hospital beds per 1,000 of the population is 10.2, this ranks extremely highly amongst other developed nations, with only Monaco and Democratic Republic of Korea ranking higher; both with a ratio exceeding 13 beds per 1,000 of the population[58]. The number of doctors per 1,000 of the population is 2.5, which also ranks highly amongst other nations and is comparable to the UK[59] (2.8).

The figures below are averages based on estimates between July 2013-14.

TABLE 4.9 – HOSPITAL STATISTICS[60]

DESCRIPTION	TOTAL 2013/14
TOTAL NO. OF IN-PATIENTS	700 (ESTIMATED)
TOTAL NO. OF BEDS	29 (INC. ACUTE, ELDERLY CARE, ITU & ISOLATION)
TOTAL NO. ATTENDING CASUALTY	4,435
TOTAL NO. RECEIVING ELECTIVE SURGERY	432
TOTAL NO. RECEIVING EMERGENCY SURGERY	81
TOTAL NO. OF GP APPOINTMENTS	8,500
TOTAL NO. OF SPECIALIST APPOINTMENTS/CONSULTATIONS	121
TOTAL NO. OF X-RAYS	1,788
TOTAL NO. OF ULTRA SOUND SCANS	754
TOTAL NO. OUT-PATIENTS	1,890
TOTAL NO. OF DOCTORS	7 (SIMULTANEOUSLY INC. SURGEON AND ANAESTHETIST)
TOTAL NO. OF NURSES	20 (ON AVERAGE 20 NURSES COMPRISING THE WARD, CASUALTY AND DISTRICT NURSING)
TOTAL NO. OF MEDICAL TREATMENTS OVERSEAS[61]	189
TOTAL NO. OF EMERGENCY MEDICAL TREATMENTS OVERSEAS	29
AV. ELDERLEY CARE UNIT OCCUPANCY	99%
AV. BED OCCUPANCY	36%

Table 4.10 shows figures relating to people with long term illness, this information was collated during the Census 2012. Respondents self-defined the severity of their illness during the Census; therefore the figures stated below are not from medical records.

[58] World Bank (2014): *Hospital Beds (per 1,000 people) 2012*. http://data.worldbank.org/indicator

[59] World Bank (2014): *Physicians (per 1,000 people) 2012.* http://data.worldbank.org/indicator (There is some discrepancy relating to the global definition of medical personnel).

[60] Provided by King Edward Memorial Hospital (FIG) July 2013-2014.

[61] This figure does not include people who were already in the UK/Chile at the start of the year. The figure only includes new referrals but may include some patients who will have gone overseas more than once. The figure also includes patients who will have visited a specialist whilst on holiday (self-funded) in Chile or UK.

TABLE 4.10 – SEVERITY OF LONG TERM ILLNESS

SEVERITY	STANLEY		CAMP		MPA		TOTAL	
	MALE	FEMALE	MALE	FEMALE	MALE	FEMALE	MALE	FEMALE
MINOR	32	37	10	13	0	2	**42**	**52**
MEDIUM	41	41	7	10	1	2	**49**	**53**
MAJOR	9	9	4	1	0	0	**13**	**10**
TOTAL	**82**	**87**	**21**	**24**	**1**	**4**	**104**	**115**

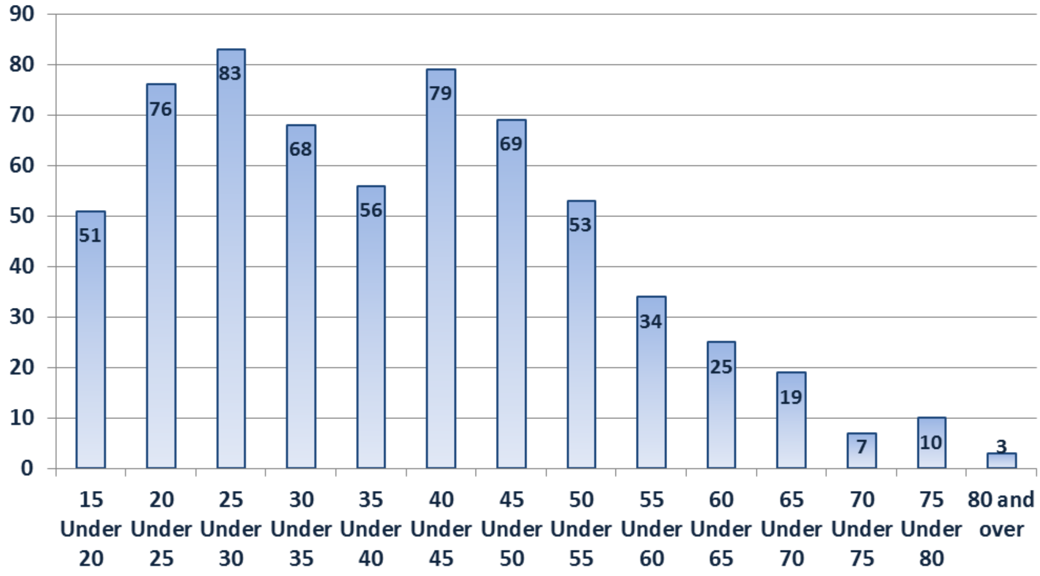
Table 4.11 shows the number of people helping or supporting family members, friends, neighbours or others because of long term ill-health or disability. At the time of the Census almost 3% of the population were supporting or looking after others with long term illness, this is relatively low compared to England and Wales where the figure is close to 1 in 10. However, although this figure is currently low, the ageing population could lead to this figure increasing in coming years.

TABLE 4.11 – PEOPLE SUPPORTING OTHERS WITH LONG TERM ILLNESS OR DISABILITY

STANLEY	CAMP	MPA	TOTAL
69	12	3	**84**

Figure 4.4 shows the total number of people who stated they smoke in the Census 2012: the age group with the highest proportion of smokers is 25 - 30; the largest proportion of smokers are under the age of 30 (33%).

FIGURE 4.4 – NUMBER OF SMOKERS BY AGE



The Census 2012 showed that 74% of the population aged 16 or over stated they consumed alcohol. Less than 1% of the population who stated they consumed alcohol were under the age of 18 years old. The age groups that made up the largest proportion of people who consume alcohol were the under 30's and those aged 40-49. Smoking and alcohol consumption figures are self-reported from the Census 2012.

FIGURE 4.5 – ALCOHOL CONSUMPTION BY AGE

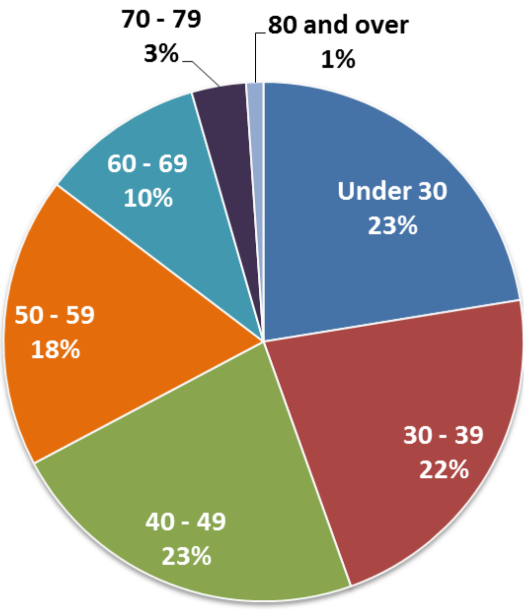
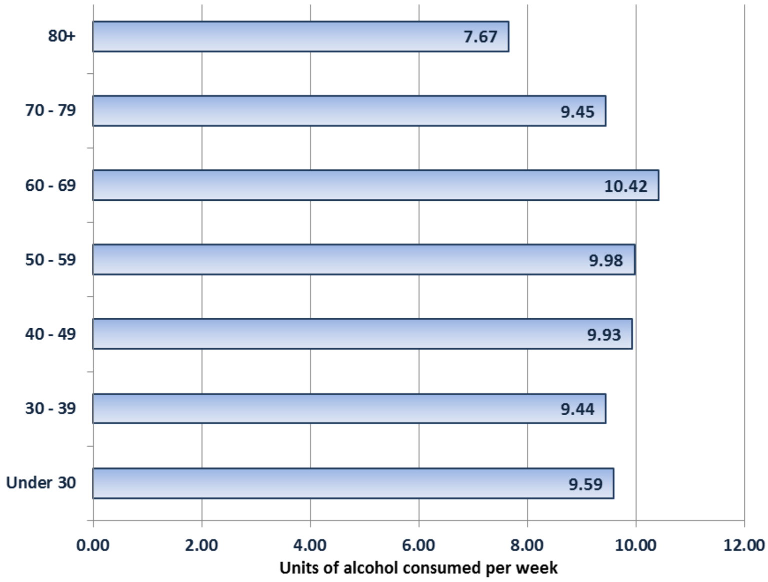


FIGURE 4.6 – AVERAGE WEEKLY CONSUMPTION BY AGE



5. NATURAL RESOURCES

AGRICULTURE

The most commonly farmed livestock in the Falkland Islands is sheep, which make up 99% of all livestock on the Islands. There is some cattle farming and a small amount of pig farming that is carried out in the Falkland Islands. The total number of animals on farms in 2013 is 1% lower than 5 year average but the totals have not varied much over the last 5 years.

TABLE 5.1 – AGRICULTURAL STATISTICS[62]

	2009	2010	2011	2012	2013
TOTAL LAND AREA (FARMING – Ha)	1,123,985	1,109,535	1,143,521	1,127,560	1,119,755
TOTAL FARM POP. (RESIDENTS)	298	293	293	288	308
TOTAL CATTLE ON FARMS	5,116	4,738	4,688	4,511	4,229
TOTAL SHEEPS ON FARMS	504,620	478,525	488,395	486,598	485,937
TOTAL PIGS ON FARMS	83	89	185	132	127

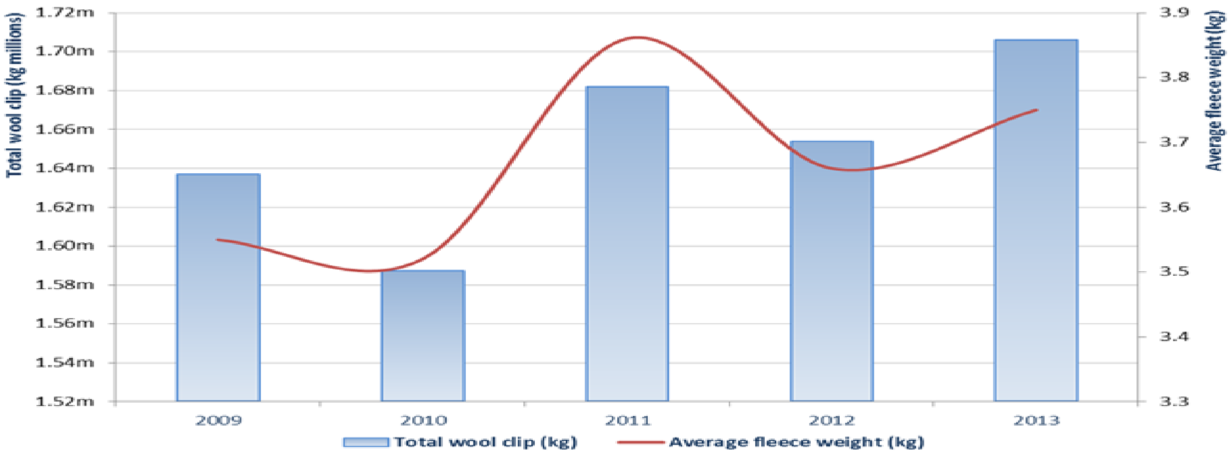
As shown in Table 5.2 the fleece weight range has been very consistent since 2010, this could be attributed to improvements in agricultural techniques and methods over the last 4 years. The total wool clip in 2013 was the highest it has been in the last 5 years and there has been a 3% increase in total wool clip in 2013.

The total number of animals to abattoir has also increased year on year since 2009. There has been a compound annual growth rate of around 14.5% since 2009.

TABLE 5.2 – AGRICULTURAL STATISTICS[62]

	2009	2010	2011	2012	2013
FLEECE WEIGHT RANGE (kg)	1.09-6.27	1.78-5.71	1.78-5.71	1.78-5.71	1.78-5.71
AVERAGE FLEECE WEIGHT (kg)	3.55	3.52	3.86	3.66	3.75
AV. GREASY WOOL (kg per Ha)	1.46	1.43	1.47	1.47	1.52
TOTAL WOOL CLIP (kg)	1,636,845	1,587,207	1,681,804	1,653,604	1,705,709
TOTAL ANIMALS TO ABBATOIR	34,463	37,130	46,826	49,750	59,295

FIGURE 5.1 – WOOL CLIP AND AVERAGE FLEECE WEIGHT



62 FIG Dept. of Agriculture – *Statistics Book 2013* (figures correct as of 31st May 2013)

FISHERIES[63]

The average number of fishing vessels between 2003 - 2013 was 212, which is lower than the total number of licence allocations (233) in 2013. There was a slight increase in the number of licence allocations during 2013 compared to 2012. The increase in the last 5 years (since 2009) has been consistent; with a steady annual average increase of over 11%.

TABLE 5.3 – FISHERIES STATISTICS – LICENCE ALLOCATIONS BY FLAG

FLEET	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
BELIZE	3	1	1	.	1	.	.	.	.	.	.
CAMBODIA	1	1	.	.	.	.	.	1	1	2	1
CHILE	1	2	.	1	2	1	.	1	.	.	.
CHINA	21	7	3	2	4	.	.	.	.	.	.
ESTONIA		1	.	2	.	.	.	.	.	.	.
FALKLAND ISLANDS	79	72	73	69	63	54	55	58	58	57	60
GERMANY	.	.	.	.	.	.	.	.	.	1	.
GHANA	.	.	.	1	.	.	.	.	.	.	.
JAPAN	14	7	2	1	1	1	1	1	1	1	
KOREA	62	59	43	42	40	38	21	34	35	35	36
NAMIBIA	.	2	.	.	.	.	.	.	.	.	.
NEW ZEALAND	1	.	.	.	.	.	.	.	.	.	.
PANAMA	2	2	2	1	1	.	.	.	.	.	.
RUSSIA	6	.	.	.	.	.	.	1	.	.	.
SIERRA LEONE	.	.	.	.	.	.	.	2	.	1	.
SPAIN	47	48	36	59	65	59	61	55	61	63	65
TAIWAN	33	34	34	10	20	13	8	45	61	67	65
UNITED KINGDOM	4	5	6	4	4	4	6	4	4	4	4
URUGUAY	2	2	2	2	.	.	.	.	.	.	.
VANUATU	.	.	2	.	.	.	.	1	2	.	2
TOTAL	276	243	204	194	201	170	152	203	223	231	233

Between 2003 and 2013, the highest proportion of all licence allocations were assigned to Falkland Islands flagged vessels, which on average contributed to 31% of licence allocations. Spanish and Korean flagged vessels were allocated 27% and 19% of the licences issued, respectively.

The number of vessels from Taiwan and Korea has fluctuated over the last 10 years. However, since 2009 there has been a consistent increase in demand (aligned with strong fishing seasons) for Falkland Islands fish and in particular Illex, from these flag states. Almost 96% of Licence B (Illex and Martialia Squid) allocations were apportioned to Taiwanese or Korean flagged vessels in 2013.

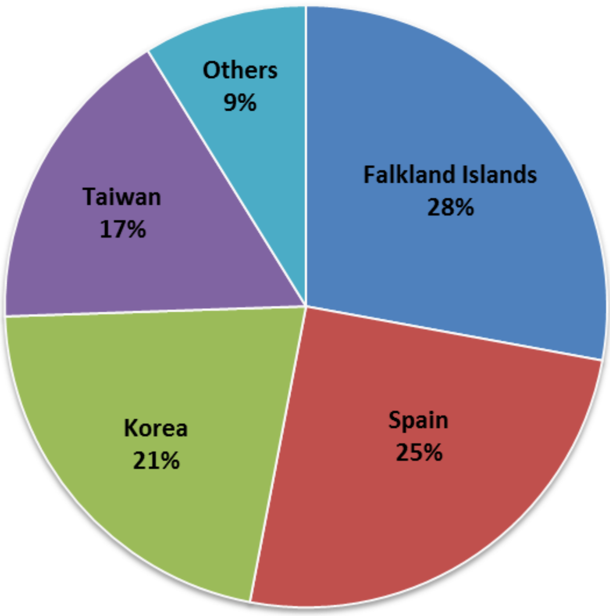
[63] FIG Fisheries Dept.: *Fisheries Statistics - Volume 18* (2014)

TABLE 5.4 – FISHERIES STATISTICS – LICENCE ALLOCATIONS BY TYPE[64]

LICENCE	SPECIES	2009	2010	2011	2012	2013
A	UNRESTRICTED FINFISH	21	22	29	29	31
B	ILLEX AND MARTIALIA SQUID	44	76	95	100	99
C	FALKLAND CALAMARI (LOLIGO)*	17	18	17	18	17
E	EXPERIMENTAL FISHERY	5	5	5	6	8
F	SKATES AND RAYS	8	8	7	8	8
G	ILLEX SQUID AND RESTRICTED FINFISH	27	23	25	25	25
L	TOOTHFISH (LONGLINERS)	1	1	1	1	2
S	BLUE WHITING AND HOKI	4	3	1	3	1
W	RESTRICTED FINFISH	30	30	27	25	28
X	FALKLAND CALAMARI (LOLIGO)**	18	17	17	16	16
TOTAL		175	203	224	231	235

* - First Season / ** - Second Season:

FIGURE 5.2 – LICENCE ALLOCATIONS BY FISHING FLEET (2003-2013)[65]



Licence B (Illex and Martialia Squid) was the licence with highest number of allocations, representing 42% of all licences issued. The number of licences issued has steadily increased since 2009, with 2013 showing the highest number of allocations over the last 5 years.

Figure 5.3 shows that the vast majority of revenue from licencing has been a result of the Licence B (Illex and Martialia squid) allocations, which contributed almost 50% of all licencing revenues in 2013. There has been a strong increase in the revenues raised by licencing since 2009, with a compound annual growth rate of almost 19%.

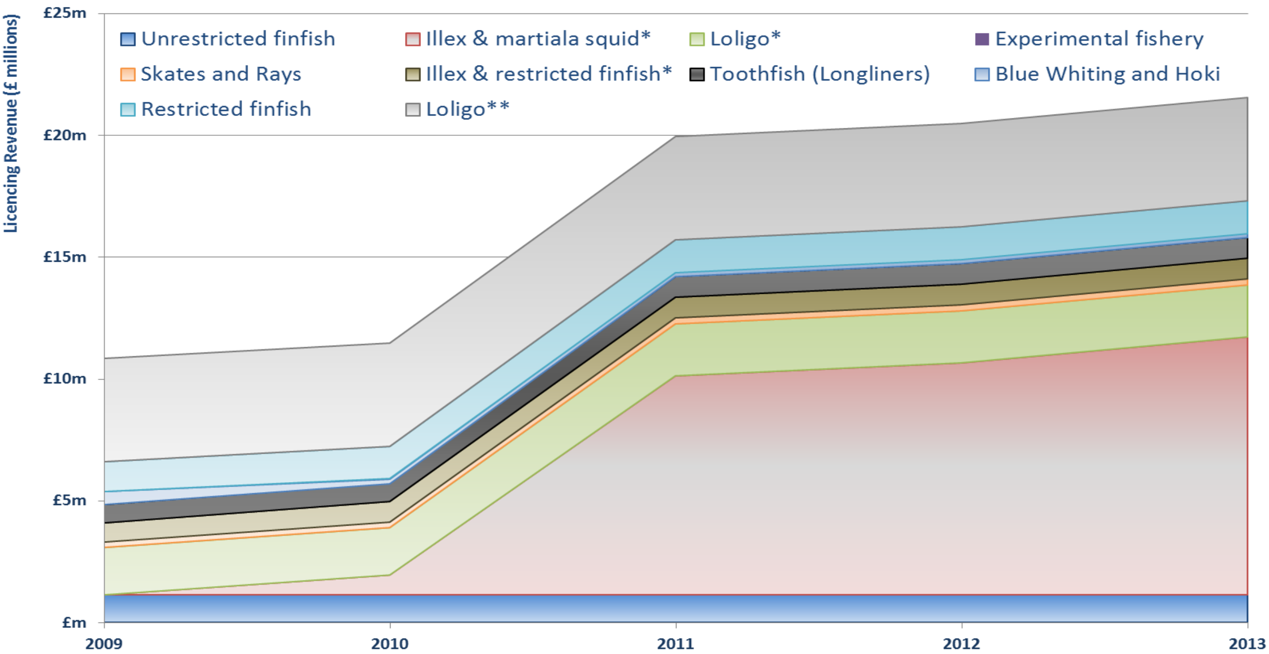
[64] Allocations by type may not exactly equate to allocations by flag due to licencing dates and vessels having more than one type of licence.
[65] Percentages are taken from an overall average per fleet between 2003 and 2013.

TABLE 5.5 – FISHERIES STATISTICS: LICENCING REVENUES

	2009	2010	2011	2012	2013
UNRESTRICTED FINFISH	£1.13m	£1.13m	£1.13m	£1.13m	£1.13m
ILLEX & MARTIALA SQUID*	£.00m	£.80m	£9.00m	£9.52m	£10.60m
LOLIGO*	£1.94m	£1.94m	£2.13m	£2.13m	£2.13m
EXPERIMENTAL FISHERY	£.00m	£.00m	£.00m	£.00m	£.00m
SKATES AND RAYS	£.25m	£.25m	£.25m	£.25m	£.25m
ILLEX & RESTRICTED FINFISH*	£.77m	£.85m	£.85m	£.85m	£.85m
TOOTHFISH (LONGLINERS)	£.76m	£.76m	£.84m	£.84m	£.84m
BLUE WHITING AND HOKI	£.54m	£.18m	£.18m	£.18m	£.18m
RESTRICTED FINFISH	£1.22m	£1.34m	£1.34m	£1.34m	£1.34m
LOLIGO**	£4.24m	£4.24m	£4.24m	£4.24m	£4.24m
TOTAL	£10.85m	£11.48m	£19.95m	£20.48m	£21.55m

* - First Season / ** - Second Season

FIGURE 5.3 – FISHING LICENCE REVENUES BY LICENCE TYPE



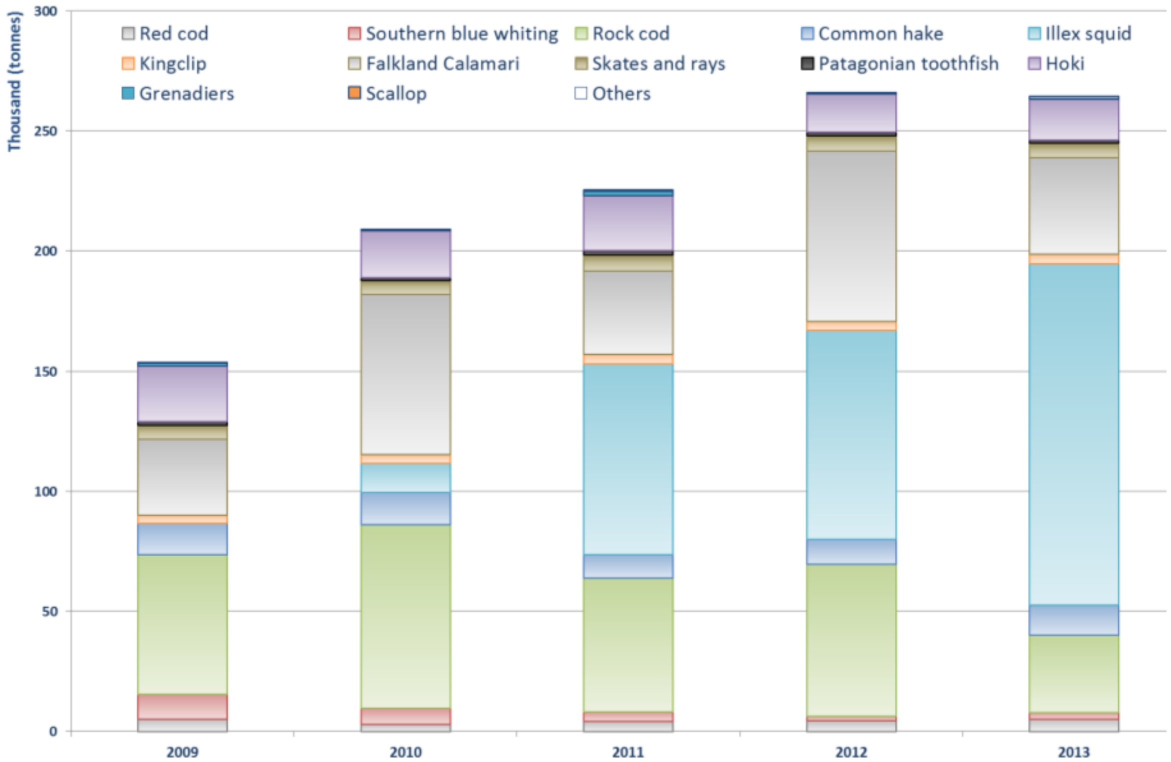
* - First Season / ** - Second Season

Table 5.6 details the volume of catches in tonnes. The largest volume of fish caught in 2013 was Illex squid, which accounted for 54% of the total volume of fish caught. The volatility of the industry is shown in Table 5.6, in 2009 only 44 tonnes of Illex was caught, this contributed less than 0.3% of the total catch for this year yet in 2013 over 142,000 tonnes were caught. Other than Illex, the other main species of fish caught in Falkland Island waters in the last 5 years have been Falkland Calamari (Loligo) which contributes around 20% of the annual total on average and Rock Cod which contributes around 24%.

TABLE 5.6 – FISHERIES STATISTICS: TOTAL CATCH (TONNES) ALL SPECIES

	2009	2010	2011	2012	2013	% 2013
RED COD	5,119	3,129	4,206	4,630	5,171	2.0%
SOUTHERN BLUE WHITING	10,395	6,471	3,974	1,611	2,698	1.0%
ROCK COD	58,234	76,456	55,648	63,510	32,420	12.3%
COMMON HAKE	13,044	13,606	9,885	10,473	12,281	4.6%
ILLEX SQUID	44	12,111	79,384	87,023	142,403	53.8%
KINGCLIP	3,389	3,639	3,942	3,508	3,964	1.5%
FALKLAND CALAMARI	31,475	66,543	34,682	70,894	40,174	15.2%
SKATES AND RAYS	5,872	5,891	6,954	6,655	5,923	2.2%
PATAGONIAN TOOTHFISH	1,419	1,403	1,559	1,313	1,423	<1%
HOKI	23,403	19,227	22,864	15,869	16,848	6.4%
GRENADIERS	958	455	2,058	225	491	<1%
SCALLOP	13	3	11	.	0	<1%
OTHERS	246	225	358	301	849	<1%
TOTAL	153,612	209,159	225,525	266,011	264,645	100%

FIGURE 5.4 – TOTAL FISH CAUGHT (TONNES) ALL SPECIES



6. INFRASTRUCTURE AND ENERGY

HOUSING AND BUILDINGS OF HISTORIC INTEREST

The number of households has increased by almost 4% since the Census 2012 and is set to increase further over the coming years due to new housing developments occurring throughout Stanley. In 2013 there were 50 new dwellings (inc. portacabins and mobile homes) constructed, 49 dwellings in Stanley and 1 dwelling in Camp.

TABLE 6.1 – NUMBER OF HOUSEHOLDS[66]

LOCATION	NUMBER OF HOUSEHOLDS
STANLEY	1048
EAST FALKLAND	127
WEST FALKLAND	72
ISLANDS	20

Exc. Communal Housing (e.g. YMCA)

FIGURE 6.1– NUMBER OF HOUSEHOLDS[67]

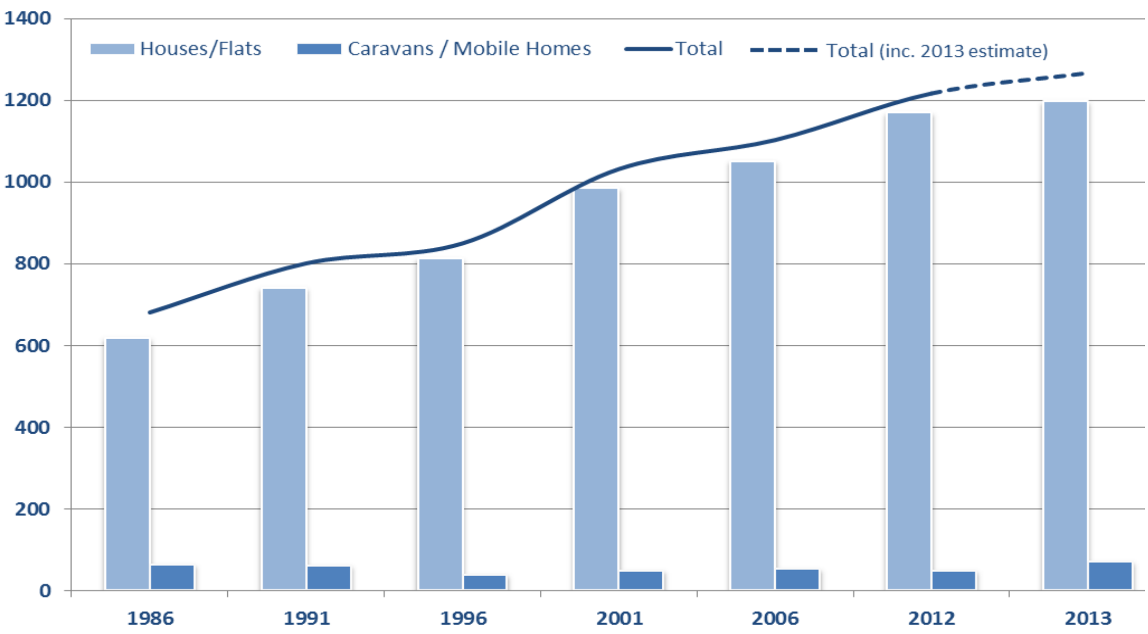


Table 6.3 provides a list of all protected or listed buildings & structures within the Falkland Islands, of which there are 64. A building or structure is listed if it has architectural interest, historic interest and close associations with people or events. The majority of listed buildings and structures are located in Stanley (73%) with the remainder (27%) split amongst East & West Falkland (8%) and the outer Islands (11%).

TABLE 6.2 – NUMBER OF PROTECTED/LISTED BUILDINGS

NUMBER OF PROTECTED/LISTED BUILDINGS & STRUCTURES	64

[66] Figures based on Census 2012 records and 2013 Environmental Planning records.
[67] 1986 – 2012 figures taken from Census data. 2013 estimates provided by FIG Environmental Planning based on planning applications and building permits.

TABLE 6.3 – LIST OF PROTECTED/LISTED BUILDINGS STRUCTURES[68]

STRUCTURE/BUILDING	YEAR
CAMBER HOUSE, STANLEY HARBOUR	1991
CAMBER PUMP HOUSE, STANLEY HARBOUR	1991
MARMONT ROW, STANLEY	1992
THE OLD HOUSE, LONG ISLAND	1998
THE GALPON, DARWIN	1998
STONE CORRAL, DARWIN	1998
STONE CORRAL , SPRING POINT	1998
MISSION BUILDINGS, KEPPEL ISLAND	1998
BOATHOUSE, STORE AND SHED, CARCASS IS.	1998
4, FITZROY ROAD EAST, STANLEY	1998
63 FITZROY ROAD, STANLEY	1998
PIGEON LOFT, 11 ROSS ROAD WEST	1998
GERMAN CAMP EAST, STANLEY	1998
GERMAN CAMP WEST, STANLEY	1998
38 ROSS ROAD (JUBILEE VILLAS)	1998
39 ROSS ROAD (JUBILEE VILLAS)	1998
40 ROSS ROAD (JUBILEE VILLAS)	1998
5 PIONEER ROW, STANLEY	1998
6 PIONEER ROW, STANLEY	1998
7 PIONEER ROW, STANLEY	1998
8 PIONEER ROW, STANLEY	1998
9 PIONEER ROW, STANLEY	1998
15 PIONEER ROW, STANLEY	1998
PARAGON HOUSE, LAFONIA	1999
GOVERNMENT HOUSE, STANLEY	1999
4 VILLIERS STREET, STANLEY	2001
GOOSE GREEN HALL	2001
CABLE COTTAGE, STANLEY	2001
POLICE STATION, STANLEY	2001
BLACKSMITH'S SHOP, DOCKYARD, STANLEY	2001
BOAT HOUSE, DOCKYARD, STANLEY	2001
CAPE PEMBROKE LIGHTHOUSE	2002
CEMETARY COTTAGE, STANLEY	2002
GILBERT HOUSE, STANLEY	2002
OLD CENTRAL STORE, DOCKYARD, STANLEY	2002
OLD GAOL , DOCKYARD, STANLEY	2002
WORKSHOP, DOCKYARD, STANLEY	2002
LOIS COTTAGE, JOHN STREET, STANLEY	2002
OLD RT STATION, STANLEY	2002
OLD STABLES, RACECOURSE ROAD, STANLEY	2002
POLICE COTTAGES, STANLEY	2002
POWDER MAGAZINE, STANLEY	2002
STANLEY COTTAGE, STANLEY	2002

[68] Based on FIG Environmental Planning Dept. data, the dates listed are based on when the listing was gazetted and may not reflect the date of designation.

STRUCTURE/BUILDING	YEAR
WATER PUMP, JOHN STREET, STANLEY	2002
WHALEBONE ARCH, STANLEY	2002
STANLEY HOUSE, STANLEY	2002
SULIVAN HOUSE, STANLEY	2002
4 PIONEER ROW, STANLEY	2002
OLD HOUSE & WOOL SHED, BARREN ISLAND	2002
MOUNT ROSALIE DIP	2003
SHALLOW BAY OLD HOUSE	2003
CAPE MEREDITH SHANTY	2003
4 DRURY STREET, STANLEY	2003
21 FITZROY ROAD, STANLEY	2003
14 PIONEER ROW, STANLEY	2003
12 DRURY STREET, STANLEY	2004
20 DRURY STREET, STANLEY	2004
STONE COTTAGE, SAUNDERS ISLAND	2004
THE TABERNACLE, STANLEY	2004
STONE COTTAGE, GOOSE GREEN	2005
THE COTTAGE, BEAVER ISLAND	2006
MAIN HOUSE, SHEARING SHED & SEALER'S HOUSE, WEST POINT ISLAND	2009
CAPE MEREDITH LIGHT	2009
STONE CORRAL, SAPPER HILL	2012

ENERGY AND AGGREGATE

There is one main power station in the Falkland Islands which produces power through the burning of diesel. There is a wind farm which produces around 35% of electrical power in the Islands, with a target of 40% for 2014. There has been an agreement reached with the MOD to provide MPA with electricity, which has led to FIG installing a further three wind turbines near MPA, thus reducing the use of fossil fuels within the Falkland Islands even further.

The demand for energy has increased year on year between 2008 and 2013, with demand increasing by 11% in that time.

TABLE 6.4 – ENERGY PRODUCTION[69]

YEAR	POWER STATION (kWh)	WIND FARMS (kWh)	TOTAL DEMAND (kWh)	FUEL CONSUMED LITRES[70]
2008/09	10,941,860	3,850,000	14,791,860	2,879,437
2009/10	11,594,770	3,952,400	15,547,170	3,035,932
2010/11	10,589,180	4,879,139	15,468,319	2,793,812
2011/12	10,901,437	5,436,567	16,338,004	2,895,452
2012/13	11,200,077	5,275,094	16,475,171	2,973,157

FIGURE 6.2 – ENERGY PRODUCTION

[69] Wind farm data is solely based on FIG wind farms, wind energy produced by privately owned wind turbines is not included.

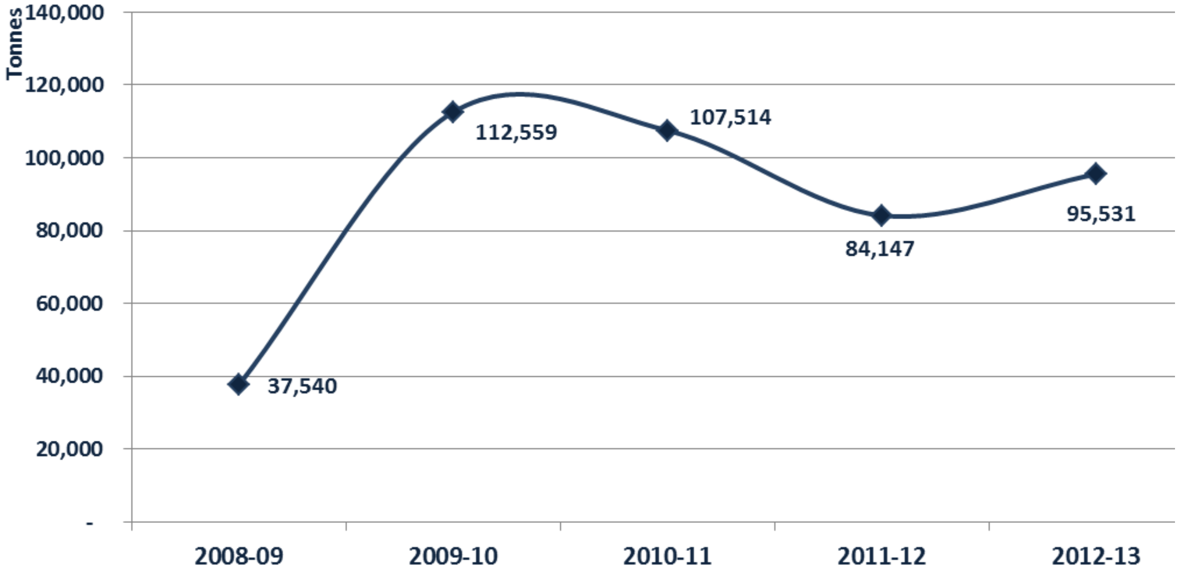
[70] FIG Power Station Data: *Fuel consumed* is the fuel consumed by the power station to produce the required electricity.

The Pony Pass quarry supplies the Islands with aggregate; the quarry is owned and operated by the Falkland Islands Government. Production in 2012-13 increased from 2011-12 and exceeded the 5-year average of 87,458 tonnes.

TABLE 6.5 – AGGREGATE PRODUCTION (PONY PASS QUARRY)

	2008-09	2009-10	2010-11	2011-12	2012-13
PRODUCTION TONNES	37,540	112,559	107,514	84,147	95,531

FIGURE 6.3 – AGGREGATE PRODUCTION (PONY PASS QUARRY)



MINERAL RESOURCES: OIL AND GAS[71]

Over the last 3-4 years there has been an increase in exploration activity in Falkland Islands waters due to the discovery of oil and gas in the region. The Falkland Islands offshore area comprises of three main basins; North Falkland Basin, Falkland Plateau Basin and South Falkland Basin.

Two partially overlapping and continuous drilling campaigns were mounted around the Falklands between February 2010 and January 2013. Sixteen wells (plus two side-tracks to core) were drilled in the North Falkland Basin plus one in the Falkland Plateau Basin using the Ocean Guardian rig, and a further four wells were drilled in the Southern Basins – two in the Falkland Plateau Basin and two in the South Falkland Basin.

A number of discoveries were made as a result of the drilling campaigns since 2010. The Sea Lion oilfield and its associated nearby satellite fields Casper (gas and oil), Casper South (gas and oil) and Beverley (gas) were discovered on the eastern flank of the North Falkland Basin, while the Liz field (wet gas/condensate and dry gas at a deeper level) was discovered on the western flank of the North Falkland Basin.

[71] All information taken from FIG Mineral Resources Dept.(2014) – http://www.fig.gov.fk/minerals/

First oil production is scheduled to be in 2019, when Phase 1 of the Sea Lion field should come on stream. The second phase of development will follow, and will include the southern part of the Sea Lion field. A new exploration drilling phase is due to commence in 2015. Table 6.5 shows a list of all production licences granted between 2008 and 2013.

TABLE 6.6 - PRODUCTION LICENCE STATUS: 2008-2013

LICENCE	OPERATOR	PARTNER (S)	PRESENT LICENCE PHASE[72]	PHASE COMMENCED	PHASE EXPIRY
PL001	ARGOS RESOURCES 100%		PHASE 2	25/11/2008	25/11/2016
PL003A	FOGL 92.5%	PREMIER 4.5% ROCKHOPPER 3%	PHASE 2	01/05/2016	01/05/2016
PL003B	FOGL 57.5%	DENHOLM 35% PREMIER 4.5% ROCKHOPPER 3%			
PL004A	PREMIER 36%	FOGL 40% ROCKHOPPER 24%	PHASE 2	01/05/2006	01/05/2016
PL004B (AREA 1)					
PL004C (AREA 2)					
PL005	FOGL 100%		PHASE 2	01/05/2006	01/05/2016
PL010	NOBLE ENERGY 35%	FOGL 52.5% EDISON 12.5%	PHASE 2	03/12/2010	03/12/2017
PL011					
PL012					
PL013					
PL014					
PL015					
PL016					
PL018	BORDERS & SOUTHERN		PHASE 2	01/11/2012	01/11/2017
PL019					
PL020					
PL025	NOBLE ENERGY 35%	FOGL 40% EDISON 25%	PHASE 2	15/12/2011	15/12/2016
PL026					
PL027					
PL028					
PL029					
PL031					
PL032	PREMIER 60%	ROCKHOPPER 40%	PHASE 2	01/05/2013	01/05/2018
PL033					

[72] Phase 2 relates to the Exploration Phase, this licence is valid for up to seven years and entry to second phase includes a commitment to drill during the seven year period. FIG Mineral Resources http://www.fig.gov.fk/minerals/index.php/licencing/production-licences

7. INFOGRAPHICS

I) ENVIRONMENT

II) POPULATION

III) ECONOMY

IV) OIL AND GAS

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