

## **REQUEST FOR PROPOSALS (RFP)**

### **MARKET ANALYSIS OF FIJI'S TELECOMMUNICATIONS SECTOR**

#### **1. INTRODUCTION**

The Telecommunications Authority of Fiji (TAF) invites proposals from qualified consultants to conduct a comprehensive market analysis of Fiji's telecommunications sector. The objective of this study is to assess market dynamics, benchmark against comparable markets, review regulatory challenges, and provide strategic recommendations to foster a competitive and innovative telecommunications landscape.

#### **2. BACKGROUND**

Fiji's telecommunications sector has undergone significant transformation over the past few decades, with key regulatory changes, new market entrants, and the introduction of emerging technologies shaping the competitive landscape. The deregulation of the sector, the issuance of new licenses, and the increasing demand for data services have highlighted the need for a structured market analysis. This study aims to inform policy decisions and strategic initiatives to enhance the sector's growth and competitiveness.

#### **3. OBJECTIVES**

The primary objectives of this market analysis are:

- To assess current market dynamics, including market structure and competition.
- To benchmark Fiji's telecommunications sector against regional and international markets.
- To review regulatory and policy frameworks affecting market performance and innovation.
- To evaluate the sector's capacity for new service providers, emerging technologies, and digital transformation.
- To provide strategic recommendations to TAF for policy and regulatory enhancements that support sector growth.

#### **4. SCOPE OF WORK**

Briefly, the selected consultant will be responsible for conducting a thorough assessment of the telecommunications sector, including:

- **Market Impact Analysis:** Quantitative and qualitative assessment of market share, competition, service quality, and customer satisfaction.
- **Stakeholder Consultation:** Engaging with industry stakeholders, government bodies, service providers, and consumers to collect insights.

- **Regulatory and Policy Review:** Evaluating existing policies, identifying gaps, and recommending regulatory improvements.
- **Industry Trends Analysis:** Examining the impact of new technologies, competition dynamics, and future disruptions.
- **Strategic Recommendations:** Developing actionable insights and policy recommendations to support a balanced and competitive market.

**A comprehensive Terms of Reference (TOR) outlining the full scope, expectations, and evaluation criteria for this market analysis is provided as part of this RFP.**

## 5. DELIVERABLES

The consultant is expected to deliver:

- **Inception Report:** A detailed work plan, methodology, and data collection approach.
- **Preliminary Analysis Report:** Initial findings, stakeholder feedback, and preliminary recommendations.
- **Final Report:** Comprehensive analysis with strategic recommendations.
- **Presentation:** A summary of key findings for TAF's management and board.
- **Executive Summary:** A concise document highlighting major findings and recommendations.
- **Implementation Action Plan:** A structured guide for TAF to execute recommended actions.

## 6. METHODOLOGY

The analysis should employ a mixed-methods approach, incorporating:

- Secondary data analysis (global market reports, industry statistics, regulatory frameworks).
- Primary data collection (interviews, surveys, focus groups).
- Quantitative and qualitative analytical techniques.

## 7. TIMELINE

The project timeline is as follows:

- **RFP Issuance:** 8th March 2025
- **RFP Submission Deadline:** 18th April 2025, 1600hrs
- **Selection of Consultant:** May/June 2025
- **Project Commencement:** Q3 2025

- **Inception Report Submission:** Consultant to advise
- **Draft Report Submission:** Consultant to advise
- **Final Report Submission & Presentation:** Consultant to advise

Soft copy of the proposal document(s) can be emailed to: [tenders@taf.org.fj](mailto:tenders@taf.org.fj)

## **8. BUDGET**

Proposals should include a detailed budget outlining personnel costs, operational expenses, logistics, and contingency. The financial proposal should also specify payment terms, including the schedule, method, and invoicing requirements.

## **9. SELECTION CRITERIA**

Proposals will be evaluated based on:

- Demonstrated expertise in telecommunications market analysis and emerging technologies.
- Robustness and feasibility of the proposed methodology.
- Track record of successfully conducting similar assessments.
- Innovative approaches and fresh insights into market dynamics.
- Cost-effectiveness and overall value for money.

## **10. PROPOSAL SUBMISSION**

Interested consultants should submit their proposals, including:

- Technical proposal detailing methodology, work plan, Gantt chart and approach.
- Financial proposal with a breakdown of costs in Microsoft Excel.
- Organizational profile and relevant experience.
- Key personnel resumes and qualifications.
- References from similar past projects.

## **11. CONTACT INFORMATION**

For further details or inquiries, please contact:

**Mr. Tevita Navila**

Manager Technical Regulatory - TAF

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TAF looks forward to receiving your proposals.

# Telecommunications Authority of Fiji

## Terms of Reference (TOR) for Market Analysis of Fiji's Telecommunications Sector

### 1.0 Background

Fiji's telecommunications sector has seen considerable changes over the last few decades. In the early 1990's, the Fijian government initiated the deregulation of the telecommunications sector which saw the then department of Posts & Telecommunications (P&T) restructured into Fiji Posts & Telecommunication Limited (FPTL).

In 1994, Vodafone Fiji began operations through a joint venture with FPTL with primary focus on introducing mobile services to the market. FPTL was later privatized into Post Fiji and Telecom Fiji Limited. The Denarau Accords, signed in 2007, were pivotal in restructuring Fiji's telecommunications sector, with the aim of promoting competition and encouraging private sector participation.

Amalgamated Telecom Holdings Ltd (ATH) was established in 1998 as a holding company to consolidate the Fiji Government's investments in the telecommunications sector. The Fiji National Provident Fund (FNPF) became its majority shareholder in late 1998 following a partial privatization process. An Initial Public Offer (IPO) of some of ATH's shares was followed by its listing on the South Pacific Stock Exchange in 2002 providing a further opportunity for public investment in the telecommunications sector.

In 2008, Digicel was issued a license to provide mobile telecommunications services in Fiji with the desire to create a competitive landscape, enhance consumer choice and drive down prices. This was done concurrently with new 15-year licenses that were issued to Telecom Fiji Limited, Vodafone Fiji Limited (separately from Telecom Fiji Limited), and Fiji International Telecommunications Limited.

In alignment with the National Development Plan (NDP) to attract new investments in the ICT sector, improve connectivity across the country, grow Fiji's BPO and KPO sectors, enhance the ICT sector's contribution to GDP, and position the country as a regional and global ICT hub, new licenses were issued to Starlink and Google. Starlink was issued a license to operate in the Fiji market and began offering high-speed satellite-based broadband services in May 2024. The license was issued with the intention to improve

connectivity in rural and maritime areas where the 3 incumbent terrestrial providers have low/no service penetration and to provide an efficient disaster response capability.

In line with the South Pacific Connect Initiative, Google was issued a license to build sub-sea cable infrastructure and datacenter in Fiji to link the United States, Fiji, Australia, and French Polynesia. This is seen as a significant step in the advancement of digital infrastructure in the Pacific region.

Current trends such as increased demand for data services, the rise of mobile payments, and the introduction of new Apps and services has changed consumer behavior that has affected the sector. In addition, the impact of COVID-19 pandemic on telecommunications, especially influencing businesses on adaptation of remote work and digital services has increased demand for fast and reliable broadband services.

Given the recent significant changes in Fiji's telecommunications landscape, the Telecommunications Authority of Fiji (TAF) aims to conduct a comprehensive market assessment of the sector. This assessment will provide strategic recommendations to foster a balanced and competitive market environment while identifying opportunities for the introduction of new services, operators, and providers.

## **2.0 Objectives**

The primary objective of this market analysis is to provide a comprehensive assessment of Fiji's telecommunications sector. This assessment will:

1. **Identify Market Dynamics:**  
Examine the factors influencing market dynamics, including the current structure and concentration of market power among existing players.
2. **Benchmark Against Other Markets:**  
Benchmark Fiji's telecommunications sector against regional/similarly sized markets to identify gaps and opportunities for improvement.
3. **Review Regulatory Challenges:**  
Analyze key regulatory and policy challenges that affect competition and market performance, incorporating stakeholder perspectives for a well-rounded view. Assess consumer rights, data protection and privacy, particularly in a rapidly changing market.
4. **Assess Market Capacity:**

Evaluate the market's capacity to accommodate the introduction of new services, operators, and service providers, particularly considering emerging ICT technologies such as Blockchain, IoT, AI, automation, 5G, robotics, and space technologies.

5. Explore ICT Hub Development:  
Investigate the role of telecommunications in advancing Fiji's goal of becoming a prominent ICT hub, including its contributions to ICT development and potential for sector growth through collaboration and innovation.
6. Deliver Actionable Recommendations:  
Provide actionable recommendations to the Telecommunications Authority of Fiji (TAF), focusing on strategic opportunities that enhance connectivity, foster innovation, and support Fiji's broader ICT growth objectives.

### **3.0 Scope of Work**

The selected organization will be responsible for:

#### **3.1 Market Impact Analysis:**

- i. Quantitative Analysis - measure the effects of all key players on market share, customer acquisition rates, service pricing, and revenue streams of incumbent operators. Analyze overall market trends in response to new entrants.
- ii. Qualitative Analysis - Assess changes in service quality and customer satisfaction across all providers, focusing on user perceptions and experiences.

#### **3.2 Stakeholder Consultation:**

- i. Conduct interviews and surveys with all key players in the market to understand their perspectives on competitive dynamics and operational challenges, including the impact of OTT services.
- ii. Engage with a cross-section of the public, including residential (urban, rural, and maritime) and business users. Gather opinions on service changes, quality of experience and overall satisfaction with telecommunications services.

#### **3.3 Regulatory and Policy Review:**

- i. Analyze the current regulatory framework and its effectiveness in managing the competitive landscape, particularly with the introduction of new technologies.
- ii. Identify gaps or areas needing adjustment in regulations or policies to accommodate evolving market conditions and foster competition, including considerations related to OTT services.

### 3.4 Impact on Industry Trends:

- i. Technology Trends - study how emerging technologies influence trends in broadband adoption, service experience and service delivery models.
- ii. Competitive Dynamics - evaluate the impact of new entrants on competition and potential changes in strategies among incumbents.
- iii. Future Disruptions - assess the potential for further disruption in the sector due to new technologies and market entrants and identify associated risks that could impact market stability and competition.

### 3.5 Strategic Recommendations:

- i. Provide strategic recommendations for TAF to support a balanced competitive environment, including potential regulatory adjustments or new policy initiatives.
- ii. Suggest strategies for incumbent operators to effectively compete in the evolving market landscape and leverage opportunities created by new entrants and technologies.
- iii. Identify potential spaces in the market for the introduction of new services, technologies, and operators, considering the overall competitive landscape.
- iv. Recommend strategies for TAF to navigate the license renewal process, ensuring it promotes competition and supports the long-term growth of the sector.

### 3.6 Deliverables

- i. A detailed plan outlining the methodology, data collection approach, and timeline.
- ii. A preliminary analysis including initial findings, stakeholder feedback, and preliminary recommendations.
- iii. A comprehensive report with final analysis, detailed findings, and strategic recommendations.
- iv. A presentation summarizing key insights, findings, and recommendations for TAF's management and board.
- v. A succinct executive summary of the final report, highlighting major findings and recommendations for quick reference.
- vi. An action plan guided by the recommendations which would guide TAF during implementation.

### 3.7 Methodology

The analysis should adopt a mixed-methods approach, including:

- i. Utilize both secondary data (global insights, market reports, industry statistics) and primary data (surveys, interviews).

- ii. Employ appropriate analytical tools and techniques to assess market trends, financial impacts, and competitive dynamics.
- iii. Conduct structured interviews, focus groups, and surveys to gather diverse perspectives.

### 3.8 Timeline

Provide a timeline for the delivery of key milestone from the start date. Key milestones include:

- i. Inception Report Submission
- ii. Draft Report Submission
- iii. Final Report Submission
- iv. Presentation of Findings

### 3.9 Budget

Parties submitting proposals must provide a detailed budget that includes the total cost of engagement with a breakdown of expenses such as personnel, operational, logistics, and contingency costs. The financial proposal should outline payment terms, including schedule, method, and invoicing requirements.

### 3.10 Selection Criteria

The selection process will consider:

- i. Demonstrated experience in market analysis and telecommunications, particularly with emerging technologies.
- ii. The robustness and feasibility of the proposed methodology.
- iii. Track record of the organization in conducting similar assessments and ability to deliver within the stipulated timeline.
- iv. Innovative approaches or methodologies that bring fresh insights into the analysis.
- v. Cost-effectiveness and value for money.

### 3.11 Contact Information

For further details or inquiries, please contact:

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