SAMPLE REPORT

FICTIONAL COMPANY | CREATED FOR DEMONSTRATION PURPOSES

Marketing Strategy Summary: Example Ltd

Standalone Executive Summary | Prepared by Greg Kurnikov, OD Expert | 13 May 2026

Market Position

Example Ltd delivers full-chain fibre-to-the-home infrastructure across three UK corridors with 51-200 multi-trade operatives. Operational delivery is strong but invisible to buyers who have not worked with the business: no published case studies, no structured commercial process, no marketing function. Revenue is concentrated (25-50% single customer) in a segment declining by an estimated 25-30% as full-fibre rollout matures.

Competitive Position

Six regional subcontractors operate in overlapping corridors: Northgate Civils Ltd and Severn Fibre Group compete directly on capability; Mersey Network Services Ltd, Atlas Telecoms UK Ltd and Cymru Network Solutions Ltd compete on geography or volume; Routeworks Specialist Ltd is a specialist comparator. None occupies the difficult-route and recovery position. Tier 1 contractors (Orchard Civils Group, Cirreva UK Ltd, Halford Henley Group) are buyers, not competitors.

Three Goals over Twelve Months

Goal 1. Become the subcontractor of choice for maintenance, remediation and difficult-route work. Six presentations, two signed packages at £50,000+, concentration below 40%, one adjacent contract.

Goal 2. Build commercial infrastructure that makes capability visible. Prequalification pack, four case studies, refreshed website with tracked enquiry form, weekly LinkedIn from Aug 2026, one inbound enquiry per month by Dec 2026.

Goal 3. Protect and deepen existing relationships. Structured quarterly account reviews, retention 70% to 80%, three industry events with follow-up conversations.

Strategy

Primary target: Tier 1 principal contractors procuring maintenance and remediation. Secondary: adjacent infrastructure buyers in battery-storage and solar civils, water-utility minor civils, and data centre campus connectivity (EV charging civils on watch list per Appendix). Positioning on difficult-route and recovery specialism. Two-tier pricing: standard framework rates plus a 15-25% premium for recovery work tied to a defined service specification.

First 90 Days

Five actions: define and name the recovery service tier; build a quote-tracking log; commission four case studies; set the rate card with recovery premium; begin quarterly account reviews. External content production budgeted at £9,000-£13,500 for the year is the one external resource the plan cannot work without. Month-four decision on fractional marketing hire or internal delegation.

Budget

Indicative total £18,000-£28,000 for the first twelve months, within the £20,000-£50,000 envelope identified during situation analysis. Headroom exists for a fractional marketing hire from month four (£8,000-£15,000 additional).

See main report for the full analysis, evidence base and implementation pack.

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Marketing Strategy Plan

Marketing Invincibility

Example Ltd

13 May 2026

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CONFIDENTIAL

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This plan is prepared for Example Ltd on the basis of information provided by the client and research conducted during the engagement period. It does not constitute financial, legal, or regulatory advice and should not be relied upon as such. All market data, competitor information and financial estimates are indicative and should be verified independently before making material business decisions.

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Non-Reliance and Confidentiality

This Marketing Strategy Plan has been prepared on a confidential basis for the named client. The findings are derived from research conducted during the engagement and from the analytical framework applied. The report is not a market research report in the sense of independently published market data; references to market data are summary in nature and the underlying sources sit in the supporting research outputs.

Outcomes from comparable engagements are indicative; specific results depend on the client's execution, market conditions, and the trajectory described herein. This report does not constitute a binding commitment to specific outcomes.

The report and the analytical method that produced it are provided to the named client and to the senior leadership team specifically. The report should not be circulated, copied, or distributed beyond that audience without prior written consent.

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Section I: Executive Summary

Market Position

Your business delivers full-chain fibre-to-the-home infrastructure across three UK corridors, employing 51-200 multi-trade operatives who handle civils, cabling, jointing, and testing without subcontracting between trades. That operational model is a genuine strength. The problem is that nobody outside your existing relationships can see it. You have no published case studies, no structured commercial process, and no marketing function. Revenue is concentrated (25-50% from a single customer) in a segment (FTTH new-build) that is declining by an estimated 25-30% as the UK's full-fibre rollout programme matures. The gap between what your business can deliver and what buyers can verify before a procurement decision is the central constraint this plan addresses.

Competitive Position

The competitive set is regional, not national. Six subcontractors operate in overlapping corridors: Northgate Civils Ltd and Severn Fibre Group compete directly on capability; Mersey Network Services Ltd, Atlas Telecoms UK Ltd, and Cymru Network Solutions compete on geography or volume; Routeworks Specialist Ltd is a specialist comparator. None of these competitors has claimed the difficult-route and recovery specialism as a market position. That territory is open. The larger Tier 1 contractors (Orchard Civils Group, Cirreva UK Ltd, Halford Henley Group) are buyers, not competitors. They award the framework packages your business is targeting.

Marketing Objectives

Three goals structure the plan over twelve months. Goal 1: become the subcontractor of choice for maintenance, remediation and difficult-route work. Headline targets: six buyer presentations, two signed packages at £50,000+, revenue concentration below 40%, one adjacent infrastructure contract. Goal 2: build the commercial infrastructure that makes operational capability visible. Targets: prequalification pack, four case studies, website with tracked enquiry form, weekly LinkedIn content, one inbound enquiry per month. Goal 3: protect existing relationships. Targets: structured quarterly reviews across all active accounts, retention from approximately 70% to 80%, three industry events with follow-up conversations.

Strategy Overview

The primary target market is Tier 1 principal contractors procuring maintenance and remediation subcontract packages. The secondary market is adjacent infrastructure buyers in battery-storage and solar civils, water-utility minor civils, and data-centre campus connectivity, sequenced as set out in the Adjacent Market Appendix. EV charging civils sits on a watch list rather than the active pursuit list, on the basis of the appendix risk-adjusted ranking. Positioning centres on difficult-route and recovery specialism, targeting work that other subcontractors avoid or perform poorly. Pricing operates on two tiers: standard framework rates for routine work, and a 15-25% premium for recovery and difficult-route projects where your capability commands a price. Distribution is direct to buyers through offer presentations, prequalification submissions, and structured account management. Communication runs through LinkedIn (primary), a refreshed website (secondary), and targeted industry events.

Implementation Priorities

Five actions take priority in the first 90 days. First, define and name the recovery service tier as a distinct, priced offer. Second, build a quote-tracking log so every quote is recorded with outcome and

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reason. Third, commission four structured case studies from completed projects. These are the raw material for everything that follows. Fourth, establish the rate card including the recovery premium, and test it on live quotes. Fifth, begin quarterly account reviews with every active customer. Content production (case studies, LinkedIn, website copy) requires an external supplier budgeted at £9,000-£13,500 for the year; this is the one external resource the plan cannot work without. By month four, a decision is needed on whether to delegate the commercial development role internally or engage a fractional marketing manager.

Budget

Indicative total marketing budget is £18,000-£28,000 for the first twelve months, within the £20,000-£50,000 range identified during the situation analysis. The remainder provides headroom for a fractional marketing hire from month four (£8,000-£15,000 additional).

Non-reliance

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Section II: Situation Analysis

Section II-A: Internal Environment

Current Marketing Position

Under £5,000 per year. For a business turning over £9 million, that figure tells its own story. Based on your input, marketing activity at Example Ltd consists of occasional LinkedIn posts (site photos, safety updates, recruitment), a website, networking, referrals, and direct outreach. Pre-qualification questionnaire (PQQ) submissions and supplier portal registrations are handled operationally rather than as marketing activity. You indicated that nobody in the organisation is specifically responsible for marketing.

In my assessment, this places Example Ltd where marketing operates at the purely operational level: some activity happens (a post here, a brochure there), but there is no market analysis, no tracking of what works, no defined audience, and no plan connecting activity to commercial results. The business does not have a structured marketing function. Marketing is not subordinated to sales, because there is no formal sales function either; commercial development happens through relationships, reputation, and direct outreach by senior people. This is common among civils contractors of your size, but it creates a specific vulnerability: when market conditions change, as they are changing now, the business has no early-warning system and no structured way to respond.

You do not currently track which activities generate enquiries, which enquiries convert, or what each customer relationship costs to acquire and maintain. There is no customer relationship management system (CRM), no pipeline visibility, and no win/loss analysis. The absence of these systems means that even the marketing activity you do carry out cannot be measured or improved systematically.

Organisational Resources and Capability

Your existing brand assets are limited to a logo and professional photography. Sales materials or brochures exist, but no broader collateral was identified. Based on your input, there is no marketing person, no marketing budget line, and no marketing process embedded in the business.

What you do have is operational credibility. A workforce of 51 to 200 people, two leased depots, approximately 38 vans, specialist civils plant, street works qualified operatives (holding New Roads and Street Works Act (NRSWA) accreditation, the industry standard for anyone working on public highways), and a management team with direct site experience. These are assets that matter to your buyers, but they are not currently presented as marketing assets. Your supervisors understand the work. Senior people get involved when something goes wrong. Customers recognise this. The gap is not in what you deliver; it is in how you present, prove, and package what you deliver for buyers who have not yet worked with you.

The absence of case studies is a material weakness. Your competitive advantage (responsiveness, difficult routes, senior attention on problem work) is real but lacks documented proof. Prospective customers comparing you against Orchard Civils Group, Cirreva, or Halford Henley Group will see structured evidence packs, ISO certifications and published case studies. From Example Ltd, they will see a website and some LinkedIn activity. The evidence gap is wider than the capability gap.

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Culture and Structure

Based on your input, decisions at Example Ltd are made quickly and without layers of process. This is a genuine operational strength for your existing customers: a build manager with a stalled route can get a senior person on the phone and a gang mobilised rapidly. For marketing purposes, however, the same flat structure creates a constraint. There is nobody whose job it is to think about the market, track competitors, maintain a target-account list, prepare bid evidence, or build the commercial case for entering new sectors.

You identified your single biggest obstacle as being too reactive commercially: no target-account list, no CRM discipline, no case studies, no bid evidence, no clear proposition for new markets. In my assessment, this is accurate and reflects a structural gap rather than a people problem. The organisation is structured for delivery, not for commercial development. Addressing this does not require hiring a large team, but it does require assigning clear responsibility for marketing activity to a named individual and giving them time and budget to do the work.

Your willingness to invest in training, certifications and equipment for adjacent markets is encouraging. The management team's vision for a diversified business is clear. The constraint is commercial capability, not direction.

Financial Capacity

Your current marketing spend is under £5,000 per annum. You have indicated a budget envelope of £20,000 to £50,000 over the next 12 months, a significant step up. At £9 million revenue, a £50,000 marketing budget represents approximately 0.6% of turnover. Industry analysis shows that B2B construction and infrastructure firms typically spend between 1% and 3% of revenue on marketing. Your proposed ceiling sits below the lower end of that range, which means every pound will need to work hard and priorities will need to be strict.

The budget is sufficient to establish the basics: a refreshed website with case studies and service pages targeting new sectors, a CRM system, a structured LinkedIn presence, bid-quality evidence materials, and targeted attendance at two to three industry events per year. It is not sufficient for paid advertising campaigns, large-scale content programmes, or outsourced lead generation simultaneously. Sequencing will matter.

Your revenue target of staying above £8 million next year while replacing at least £2 million of at-risk telecoms build revenue sets a clear commercial frame. With 50 to 75% of revenue currently concentrated in FTTH network build packages (civils, splicing, blown fibre, testing and reinstatement), and 25 to 50% coming from a single customer, the financial case for marketing investment is straightforward: without it, you are relying on a shrinking pool of work from a narrowing buyer base.

Products and Services

Between 50% and 75% of your revenue comes from FTTH network build packages: civils (duct and chamber installation, blockage clearance, reinstatement) plus fibre installation (splicing, blown fibre, overhead cabling, testing). Available market data shows that new-build fibre volumes fell by approximately 26% between 2024 and 2025, and consolidation among the alternative network operators (the smaller fibre companies that are not Britlink Networks) is reducing the number of buying organisations. Your own assessment that the core offering is in a declining phase is supported by the research evidence.

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You have already begun to respond. You pulled back from low-margin labour-only gang supply with poor planning and high idle time, and you are more selective about one-off small jobs with no follow-on potential. These are sensible commercial decisions. You have also identified a pipeline of new service lines: route remediation, network build recovery, fibre backbone maintenance support, private network civils, data-centre route works, small-cell civils, and utilities ducting and trenchless support.

Your current pricing approach is cost-plus margin. This is standard for the telecoms network build subcontracting sector, but it offers limited differentiation. If your recovery and difficult-route work genuinely commands faster mobilisation and lower defect rates than competitors can offer, cost-plus pricing may be leaving value on the table. Whether buyers would pay a premium for these capabilities, or whether they simply serve as tie-breakers in an otherwise rate-driven procurement, is a question that the customer environment research in this plan will need to test.

Information gap. A detailed revenue breakdown by service line was not provided. The concentration figure (50 to 75% from the top service category) indicates material revenue risk but does not allow a full portfolio analysis. Obtaining a service-by-service revenue breakdown for the last two financial years would strengthen the product strategy recommendations in Section V of this plan.

Section II-B: Customer Environment

Who Buys From You Now

Between 50% and 75% of your revenue comes from a narrow buyer type: telecoms principal contractors and network operators procuring full FTTH network build support (civils, splicing, fibre installation and testing). Your typical contact is a build manager, civils lead, delivery manager or commercial manager under pressure to keep a programme moving and avoid defects and reinstatement issues. The relationship is B2B, repeat-driven, and concentrated: 25% to 50% of revenue comes from a single customer, and over 70% from repeat work.

Your acquisition channels are referrals, networking, direct outreach and prior relationships. Market research confirms this matches one of the four standard procurement routes in telecoms civils: direct engagement, where a principal contractor engages a subcontractor for specific packages, particularly where panel capacity is stretched. You are not active in the other three routes.

Purchase Decision Mechanism

Research confirms a two-stage buying process. The first stage is prequalification: the buyer checks company registration, audited accounts, insurance, health and safety accreditation (SSIP or equivalent), street works qualifications, environmental policy and relevant case studies. This is a pass/fail gate. Since February 2025, public-sector-adjacent contracts require the Common Assessment Standard. Private-sector procurement follows a similar pattern without the statutory obligation.

The second stage is commercial evaluation: price, capacity, programme fit and technical capability. Your description of the buying centre (delivery manager raises the need, procurement checks credentials) is consistent with the market evidence. For framework-based work the cycle is days to weeks; for new supplier onboarding, several weeks to months.

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What Drives the Choice

The seven factors that most frequently determine subcontractor selection, in order of citation frequency in industry sources, are: health and safety record (pass/fail baseline), past performance and track record, price and rates, capacity and current workload, technical capability and accreditation, financial stability, and reporting and compliance capability.

Two findings are worth flagging against your assumptions. First, your belief that potential customers choose not to buy due to "price, scale and procurement confidence" is partially supported, but the evidence suggests the barrier may be as much about bid documentation quality and reporting capability as about price. Industry analysis notes a shift away from lowest-price selection toward delivery confidence, particularly on framework awards. Second, your stated advantage (responsiveness, ability to handle difficult work, senior attention on problems) corresponds to factors three and four on the list, but these are tie-breakers at best unless supported by documented evidence. In a market that increasingly weights past performance and reporting capability, the absence of case studies and structured reporting templates is a more significant barrier than price alone.

Customer Segments and Their Behaviour

Three distinct buyer segments operate in this market, each with different procurement dynamics.

The first segment is the large network operators, led by Britlink Networks. They procure through formal frameworks and approved principal contractor relationships. You reach these buyers through principal contractors, not directly.

The second is principal contractors: Orchard Civils Group, Cirreva, Tellurian Networks, Halford Henley Group. They maintain their own subcontractor panels and select on capacity, geography, rates and track record. Repeat work is common where performance satisfies. This is your core buyer segment.

The third is smaller alternative network operators. With 96% considering mergers, acquisitions or partnerships, their procurement is less formal and more relationship-driven. This segment is shrinking as a new-build buyer but may grow as a maintenance buyer.

Value Perception

Your customers are buying programme certainty, not just labour. Delivery confidence is overtaking lowest price as the primary selection driver on framework awards. This creates a gap between what you deliver and what you can prove. Existing customers value your responsiveness and ability to handle difficult routes. Prospective customers cannot verify these claims: they see a website and some LinkedIn activity, while competitors present structured evidence packs, formal reporting templates and published case studies. The perception of value is constrained by what evidence the buyer can see at the prequalification and commercial evaluation stages.

Your cost-plus pricing approach is standard for the sector but does not signal differentiated value. Whether buyers would pay a premium for faster mobilisation and lower defect rates, or treat these as tie-breakers, is addressed in Section V.

Retention Economics

Your estimated retention rate of approximately 70%, dependent on programme continuity, is plausible. Research confirms that repeat work is standard among principal contractor panels where

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performance satisfies and programme continuity exists. The qualification matters: retention in this sector is programme-driven, not loyalty-driven. When a programme ends or an operator consolidates its supply chain, even a well-performing subcontractor loses the account.

With average annual customer spend not formally tracked and no customer relationship management system in place, a precise lifetime value figure cannot be calculated. The bounds below set out an indicative sensitivity envelope; the quote-tracking log proposed in Section VI is designed to close the data gap these bounds reflect.

Inputs (inferred from 9 million pounds revenue divided across the customer base): annual customer revenue 150,000 to 300,000 pounds; tenure 2 to 3 years; referral factor 1.0 to 1.33 (zero or one referral over tenure).

- Low case: 150,000 × 2.5 × 1.0 = 375,000 pounds.
- Base case: 200,000 × 3.0 × 1.0 = 600,000 pounds.
- High case: 300,000 × 3.0 × 1.33 = 1,200,000 pounds.

The wide envelope (375,000 to 1,200,000 pounds) reflects absent tracking data, not a substantive claim. Losing one major customer would remove 300,000 to 600,000 pounds of annual revenue with no pipeline to replace it.

Your customer relationships show moderate strength: the repeat rate is reasonable and referrals happen informally. But this tolerance is fragile. It depends on personal relationships with specific build managers rather than on documented performance records. A competitor offering equivalent capability with better documentation would erode that trust quickly. The balance is real but portable: it belongs to individuals, not to the brand.

Seasonal Patterns

Winter slows civils productivity and reinstatement quality. December and January are the weakest months, with weather conditions and partial site shutdowns reducing output. Spring and summer (March to September) are historically strongest. However, in telecoms specifically, programme-driven timing increasingly overrides seasonal patterns: operator build milestones, The National Gigabit Programme contract deadlines and regulatory reporting cycles create demand peaks that do not follow the traditional calendar. Your observation that "recently, programme changes have mattered more than seasonality" is consistent with this trend.

Why Some Buyers Do Not Engage

Four factors keep potential customers from engaging. In-house capability is the most common: some principal contractors maintain their own civils teams and only subcontract overflow. Procurement friction is the second: the prequalification burden deters buyers from onboarding new suppliers when panel members are available. Programme uncertainty is the third: with new-build volumes declining approximately 26% between 2024 and 2025, some buyers are consolidating to fewer, larger contractors. Workforce constraints are the fourth: the fibre engineering workforce is ageing, and the projected shortfall can reduce work reaching the subcontractor market. A precise demographic share is not anchored to a citable industry source in this engagement; the directional finding is sound, the exact percentage is not.

For Example Ltd specifically, the evidence suggests that the procurement friction barrier is the one most within your control. You have the operational capability; what you lack is the documented

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evidence (case studies, reporting templates, formal bid materials) that would reduce the perceived risk for a buyer considering adding you to their panel.

Section II-C: External Environment

Market Maturity and Growth Direction

At 78% full-fibre coverage and 23.7 million premises passed, how much new-build civils work is left? That question shapes everything in this section. The answer is: less than there was twelve months ago, but the replacement work is already visible.

Telecoms civils in the UK sits across three distinct maturity stages. New-build fibre construction, still the largest segment by value, is in late growth transitioning to early maturity. Build rates among the top ten alternative network operators fell from approximately 26,000 premises per month in 2024 to around 19,300 in 2025, and Britlink Networks is approaching its 25 million premises target by December 2026. The work is not ending, but volume is contracting at approximately 26% on the cited top-ten operator sample (an estimated 25% to 30% range across the wider market on the same time base), and the remaining build is harder, more rural, and more expensive per premises passed.

Maintenance, remediation and fault civils represent an earlier-stage growth segment, expanding at an estimated 5% to 10% annually as the installed fibre base grows. Every million premises connected generates ongoing demand for blockage clearance, duct repair, reinstatement and route recovery. Orchard Civils and Cirreva hold the maintenance frameworks with Britlink Networks and the major operators; at the regional subcontractor tier, the access route is through these framework holders rather than directly. Your full-chain capability (civils through testing) maps to maintenance requirements and positions you as a higher-value subcontractor for these packages than a civils-only competitor.

Adjacent infrastructure civils sit in early to mid growth across four candidate areas: battery-storage and solar farm civils, water-utility minor civils under the AMP8 capital programme, data centre campus connectivity, and EV charging civils. The UK public chargepoint count expanded approximately 20% in 2025 (point-count growth), with ultra-rapid installations up 41% year on year. Data centre construction is projected to grow at a compound rate of 16.9% annually to 2031. Grid-scale battery storage capacity grew 45% in 2025, and the UK water sector has GBP 104 billion in approved 2025-2030 capital investment, a 71% increase on the prior period. All four require ducting, excavation, reinstatement, traffic management, and in many cases cabling and testing: competencies your business already delivers across the full FTTH build chain.

Market Sizing

The UK telecoms infrastructure civils market sits in the range of three to four billion pounds annually, an analytical estimate derived from operator investment data: Britlink Networks alone spends over 1.2 billion pounds annually on fibre civils, and UK operators collectively invested 6.8 billion pounds in fixed network infrastructure in 2024 (a 14% real-term decline).

Your operating regions account for a substantial share of active build programmes. The regional addressable market sits at 1.2 to 1.8 billion pounds. The serviceable market for a nine-million-pound regional subcontractor, constrained by geography, supply chain position and workforce, is estimated at 80 to 150 million pounds. You capture roughly 6% to 11% of that envelope, consistent with a fragmented tier of over 1,500 businesses.

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Confidence: moderate. No public source separately sizes this submarket; figures are directional.

The Supply Chain Above You

Four large contractors sit between you and the network operators: Orchard Civils Group (886 million pounds revenue, PE-backed), Cirreva UK Ltd (part of a 4.5 billion US dollar group, Britlink Networks build-partner), Halford Henley Group (Tier 1 status but revenue declining from 73 million to 51 million pounds), and Meridian Group Services (approximately three billion pounds post-Tellurian Networks acquisition). At 20 to 300 times your scale these firms are supply chain partners, not rivals for the same packages. They matter as customers, as sources of released work (HHG's contraction may free regional packages), and as potential acquirers.

Competitor Dossier: Northgate Civils Ltd

Incorporated October 2016, approximately 53 employees, London-based with contracts extending to the South and East of England. This places Northgate Civils in direct geographic competition with you across two of your three core corridors.

Positioning. Multi-disciplined construction contractor: civil engineering, network installations, maintenance and repair, highway maintenance, and paving.

Service comparison. Broad overlap across civils and network installations: duct, chamber, reinstatement and general network build. Northgate Civils also covers highway maintenance and paving, which you do not market explicitly. Your difficult-route and recovery specialism has no visible equivalent in Northgate Civils's published materials. Neither firm's published profile mentions splicing or fibre installation as prominently as Severn Fibre Group or Cymru Network Solutions, though both deliver full FTTH build packages in practice.

Marketing. Company website (functional but modest), LinkedIn page with small following. No Trustpilot or Google Reviews presence identified.

Strengths. ISO 9001, ISO 14001 and ISO 45001 triple certification through the British Assessment Bureau. For a company founded in 2016, this signals operational maturity. Steady growth to 53 staff without visible acquisition activity.

Weaknesses. No published case studies, no visible client endorsements, and no evidence of formal bid documentation beyond the ISO certifications. Scale is comparable to yours, meaning capacity constraints are likely similar.

Classification: Defend. Geographic overlap in the South East and East of England makes Northgate Civils the most directly relevant competitor in your operating corridors. Review: November 2026.

Competitor Dossier: Severn Fibre Group Ltd

Incorporated August 2011, registered in Bristol, approximately 60 employees. Cash at bank 2.38 million pounds as at the most recent accounts (February 2025), up from 1.0 million the prior year.

Positioning. Full turnkey solution for Tier 1 network builds to ISPs: chambers, blockage clearance, reinstatement, PIA-accredited teams, blown fibre, sub-ducting, overhead cabling, and A55 documentation. This is the closest service match to your business of any competitor profiled.

Service comparison. Near-exact overlap across the full FTTH build chain. Severn Fibre Group also holds PIA accreditation, and its positioning emphasises the turnkey message more explicitly than

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yours. The capability gap is narrow; differentiation lies in geographic heartland and route-recovery specialism rather than service breadth.

Marketing. Professional website with detailed service descriptions, active LinkedIn page. More polished outbound presence than most competitors at this scale.

Strengths. Fifteen-year track record, doubling cash reserves, PIA accreditation, and a positioning message that centres on being large enough for complex builds but responsive enough for quality delivery.

Weaknesses. Bristol headquarters means the South West is its natural heartland, creating less overlap with your Midlands and East of England corridors than Northgate Civils. No Glassdoor, Trustpilot or Google Reviews presence identified.

Classification: Defend. Closest direct competitor by service match and scale. Geographic overlap is partial but real, particularly on south-corridor and nationwide packages. Review: August 2026.

Other Regional Competitors

Mersey Network Services Ltd. Merseyside base, incorporated December 2016, claims nationwide coverage. Turnkey full fibre delivery with 2.5 million metres of spine cable installed and experienced leadership (combined 80-plus years). Limited geographic overlap with your corridors, but could appear on the same packages where operators seek wider panel coverage.

Atlas Telecoms UK Ltd. Horsham base, incorporated January 2020, part of a global group claiming over 1,000 staff across 25-plus countries. UK civils presence appears early-stage, concentrated in Essex and London with active Britlink Networks FTTH recruitment. Operates a training academy. Worth monitoring as the UK operation scales.

Cymru Network Solutions Ltd. Merthyr Tydfil base, incorporated May 2015. Specialises in network build and maintenance with particular strength in splicing. Runs a dedicated training school. Welsh base and splicing emphasis create a different profile; overlap occurs on packages requiring civils-plus-splicing in western corridors.

Competitor	Classification	Rationale	Review date
Northgate Civils Ltd	Defend	Direct geographic overlap in South East and East of England corridors	Nov 2026
Severn Fibre Group	Defend	Closest service match and comparable scale; partial geographic overlap	Aug 2026
Mersey Network Services Ltd	Monitor	Merseyside heartland limits overlap; nationwide claims create occasional competition	Nov 2026
Atlas Telecoms UK Ltd	Monitor	UK civils presence early-stage; Essex/London	Nov 2026

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Competitor	Classification	Rationale	Review date
		focus; scaling trajectory to watch	
Cymru Network Solutions Ltd	Monitor	Welsh base and splicing niche create different profile; limited corridor overlap	Nov 2026

Five Competitive Pressures Shaping This Market

Rivalry between existing contractors: HIGH (8/10). New-build fibre volumes declined by an estimated 25% to 30% year on year while contractor numbers remain broadly unchanged, leaving regional subcontractors chasing fewer packages with the same headcount. Framework structures reduce intensity among incumbents while raising barriers for outsiders. At the regional subcontractor level, fragmentation means rivalry is high but poorly visible: you compete against firms like Northgate Civils Ltd, Severn Fibre Group and Mersey Network Services Ltd for the same packages, but market intelligence on who wins and why is scarce.

Barriers to new competitors entering: HIGH, so threat is LOW (3/10). Accreditation requirements (NRSWA, EUSR, operator prequalification) create a de facto experience barrier. Experienced multi-trade operatives (civils, splicing, blown fibre, testing) take years to develop and are not available for hire at scale; while general labour is available as new-build volumes decline, the competence to work across the full FTTH chain is a different constraint. Cymru Network Solutions and Atlas Telecoms UK Ltd counter this with in-house training academies, an approach that signals commitment but takes time to yield field-ready multi-trade crews.

Alternative methods reducing traditional civils demand: MODERATE (4/10). Microtrenching can cut deployment cost by up to 60%, but does not eliminate chamber work, reinstatement or blockage clearance. Physical infrastructure access allows operators to reuse existing ducts. Satellite broadband substitutes only in rural locations where civils costs are prohibitive.

Buyer bargaining strength: HIGH (7/10). Altnet mergers are concentrating civils spend into fewer buying entities, and consolidation more broadly is concentrating purchasing power. Framework structures let buyers redistribute volumes among panel members at short notice. The counterweight is switching cost: replacing a subcontractor whose crews deliver across the full FTTH chain (civils through testing) with a single-trade replacement creates coordination risk at trade interfaces that buyers are paying to avoid.

Labour and input cost pressure: MODERATE overall, MODERATE-HIGH for experienced operatives (6/10). General labour is more available as new-build volumes decline, but experienced multi-trade operatives remain difficult to find. The broader construction workforce is ageing (35% over 50, only 20% under 30), affecting long-term pipeline without creating an immediate shortage at current volumes. Plant and materials markets remain competitive.

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Industry forces analysis

Pressure from each force on the client's market position

Competitive rivalry	High	●●●●●	Volumes down an estimated 25-30% while contractor numbers unchanged; regional fragmentation with limited market intelligence on who wins and why.
Buyer power	High	●●●●○	Altnet mergers are concentrating civils spend into fewer buying entities; framework structures let buyers redistribute volumes among panel members at short notice.
Supplier power	Moderate	●●●○○	Plant and materials competitive; experienced multi-trade operatives remain difficult to find but general labour is available as volumes decline.
Threat of substitutes	Moderate	●●○○○	Microtrenching and duct sharing reduce some volume; chambers, reinstatement and clearance have no substitute.
Threat of new entrants	Low	●○○○○	Accreditation barriers, framework gatekeeping and multi-trade experience requirements block new entrants at scale.

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Emerging Opportunity: Borough Fibre

ISPreview UK reported in May 2026 that Borough Fibre may restart large-scale FTTP expansion following its November 2023 pause. The financial case is visible: revenue of 113 million pounds (up 48%), 429,000 subscribers, and EBITDA of 49.8 million pounds. The network covers 1.342 million homes, predominantly in London with some South East locations. If expansion restarts at scale, this creates new subcontract packages in your corridors.

Market Territory

Three types of ground. Own territory: your existing repeat customers, where approximately 70% retention is programme-driven, not loyalty-driven. Holding this depends on building documented evidence that makes you harder to replace.

Competitor territory: operator framework positions held through the Tier 1 layer above (Orchard Civils, Cirreva, Meridian Group, HHG), entrenched through multi-year agreements and formal accreditation. Attacking these directly at your scale is not realistic; the productive approach is capturing work that flows down through these frameworks, or work released when frameworks contract.

Neutral territory: smaller altnets without established panels (Borough Fibre being the most immediate prospect), adjacent infrastructure buyers entering for the first time, and packages released by contracting competitors. Among your direct regional competitors, none appears to have locked down exclusive territory in your corridors. This is where marketing investment will produce the highest return per pound spent.

External Factors

Economic. Fixed telecoms network investment declined 14% in real terms in 2024. Altnet cumulative losses reached 1.5 billion pounds, with 47% of fibre companies facing refinancing by 2026. The investment environment is tightening, but Borough Fibre's financial improvement signals that not all operators are contracting.

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Regulatory. Ofcom's Telecoms Access Review 2026-31 shifts emphasis from new-build incentives to protecting investment returns. Physical infrastructure access obligations continue, reducing some civils demand. The Common Assessment Standard now applies to public-sector-adjacent contracts.

Technology. Microtrenching and infrastructure sharing reduce some traditional civils volume but do not eliminate core activities. 5G densification creates new urban civils demand. Data centre expansion generates growing ducting work.

Workforce. Not the binding constraint it appears in broader construction data. Declining new-build volumes mean general labour is available in telecoms civils. The real constraint is experienced multi-trade operatives who can work across civils, splicing, blown fibre and testing without supervision, and that has always been the case in this sector, not a new market condition. Two of your competitors (Cymru Network Solutions, Atlas Telecoms UK Ltd) are investing in training academies; whether this produces multi-trade competence or single-skill operatives will determine its competitive impact.

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Section III: SWOT Analysis

Part 1: SWOT Matrix

Strengths

S1. Full-chain FTTH delivery without subcontracting between trades. Over Northgate Civils and Mersey Network Services Ltd (narrower published profiles), on single-contractor delivery across civils, splicing, blown fibre, overhead cabling, testing and reinstatement, for principal contractors eliminating coordination risk at trade interfaces. Confidence: High.

S2. Difficult-route and recovery specialism. Over all five profiled regional competitors (none positions explicitly in recovery or stalled-build remediation), on completing routes that have failed or been abandoned, for build managers under programme pressure. Confidence: High.

S3. Senior operational involvement on problem work. Over larger-scale supply chain firms where subcontract management is layered, on decision speed and direct supervisor access, for delivery managers who need a senior person on the phone within hours. Confidence: Moderate.

S4. Regional depot coverage in three active corridors. Over Severn Fibre Group (Bristol heartland) and Cymru Network Solutions (Welsh base), on local crew availability in the Midlands, South East and East of England, for principal contractors whose programmes need a gang on site within the region rather than mobilised from a distant base. Confidence: Moderate.

S5. Retention of experienced, multi-trade operatives. Over new entrants and single-trade competitors (Atlas Telecoms UK Ltd early-stage UK presence; Cymru Network Solutions splicing-focused), on having crews who can move between civils, splicing, blown fibre and testing without retraining, for principal contractors who need a single subcontractor to deliver complete route sections. Confidence: Moderate.

S6. Flat structure enabling rapid mobilisation. Over the four Tier 1 firms above you, on response time from enquiry to gang on site, for build managers under programme pressure who need a subcontractor mobilised within days. Confidence: Moderate.

Weaknesses

W1. No documented evidence base. Zero published case studies, no structured reporting templates, no win/loss analysis. Visible at prequalification and costs opportunities before price is discussed.

W2. Revenue concentration. 25-50% from a single customer, 50-75% from one service line. A single programme ending could remove 300,000 to 600,000 pounds of annual revenue with no pipeline to replace it.

W3. No inbound marketing channel or pipeline visibility. Every customer arrived through relationships, referrals or direct outreach. No system to generate inbound enquiries, no CRM, no pipeline tracking.

W4. Bid documentation below buyer expectations. Industry procurement is shifting from lowest-price selection toward delivery confidence, assessed partly through documentation at prequalification. Current materials do not match what buyers see from framework-panel competitors.

W5. No formal customer tracking or retention system. Retention at approximately 70% is programme-driven, not loyalty-driven. Trust is real but portable: it belongs to individuals, not the brand.

W6. Cost-plus pricing with no value capture mechanism. Standard for the sector, but if recovery and difficult-route work commands faster mobilisation and lower defect rates, cost-plus may be leaving value on the table.

Opportunities

O1. Maintenance, remediation and fault civils growing as the installed base expands. Estimated 5-10% annual growth. Orchard Civils and Cirreva hold the maintenance frameworks; at your scale, the access route is subcontracting through these Tier 1 framework holders, the same model as new-build. Full-chain capability maps directly to maintenance requirements. Confidence: High.

O2. Adjacent infrastructure civils. Four candidate areas, three for active pursuit, one on the watch list. Battery-storage and solar civils, water-utility minor civils under the AMP8 programme, and data centre campus connectivity all carry transferable civils scope; EV charging civils is deferred, pending resolution of the electrical-partner and grid-connection issues set out in the Appendix. Data centre construction is projected at 16.9% compound annual growth to 2031; grid-scale battery storage capacity grew 45% in 2025; water-utility AMP8 totex is GBP 104 billion approved over 2025-2030. All require ducting, excavation, reinstatement and in many cases cabling and testing. Confidence: Moderate.

O3. Borough Fibre potential restart. Revenue 113 million pounds (up 48%), 429,000 subscribers, network covers 1.342 million homes predominantly in London and the South East. If expansion restarts at scale, new subcontract packages in your corridors. Confidence: Low-Moderate.

O4. Supply chain restructuring as altnet operators consolidate. 96% considering mergers, acquisitions or partnerships. When operators merge, procurement panels are re-tendered. A regional subcontractor with documented capability and existing Tier 1 relationships is better positioned to capture re-tendered packages than a new entrant. Confidence: Moderate.

O5. Altnet contraction releasing regional packages. HHG revenue declined from 73 million to 51 million pounds. 47% of fibre companies face refinancing by 2026. Packages previously locked into larger frameworks may become available. Confidence: Moderate.

Threats

T1. New-build fibre volume contraction: estimated 25-30% year-on-year decline, with the cited top-ten operator sample at approximately 26%. Build rates fell from approximately 26,000 to 19,300 premises per month (2024-2025) on that sample. Britlink Networks approaching 25 million premises by December 2026. Revenue concentration in this segment (50-75%) makes the impact direct. Probability: near-certain. Impact: high.

T2. Buyer consolidation concentrating purchasing power. 96% of altnets considering M&A. Framework structures allow redistribution of volumes at short notice. Fewer buying entities, higher switching cost if a relationship ends. Probability: high. Impact: moderate-high.

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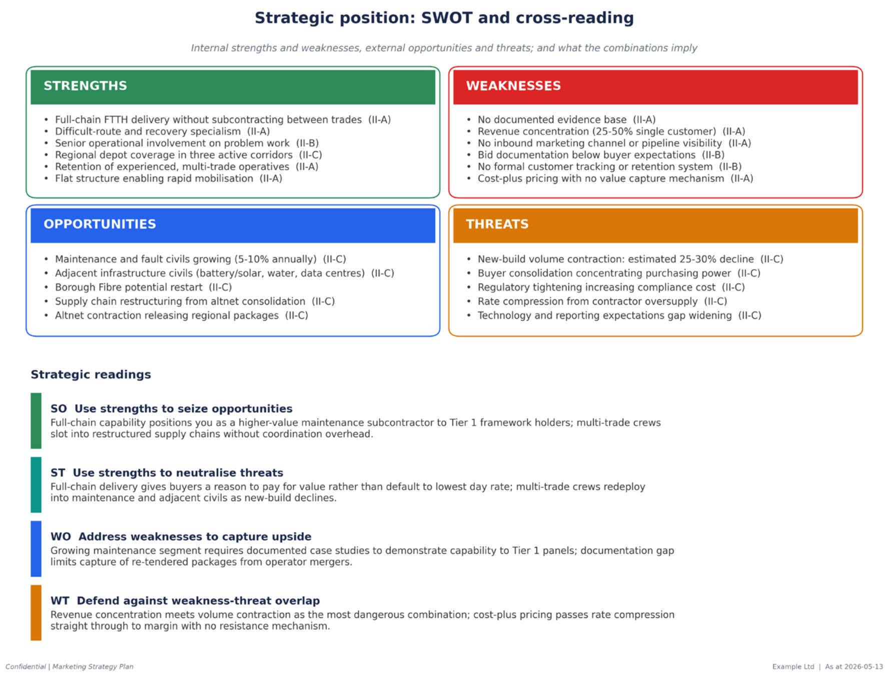
T3. Regulatory tightening increasing compliance cost. Doubled fixed penalty levels, Section 74 overrun charges now including weekends, Common Assessment Standard on public-sector-adjacent contracts. Each layer adds cost that larger competitors absorb more easily. Probability: certain. Impact: moderate.

T4. Rate compression from contractor oversupply in declining volumes. Volumes fell by an estimated 25-30% while contractor numbers remain unchanged. Buyers can push rates down, and cost-plus pricing provides no mechanism to resist. Smaller firms absorb margin pressure less easily than larger competitors with diversified revenue. Probability: high. Impact: moderate-high.

T5. Technology and reporting expectations gap widening. Digital surveying, dashboards, automated reporting raise the perceived-risk gap. Existing customers tolerate absence of formal reporting; new buyers, particularly in adjacent markets, will expect it as baseline. Probability: moderate-high. Impact: moderate.



Part 2: Competitive Advantage Assessment

Your advantages fall across four types. Physical (full-chain delivery, depot infrastructure, experienced multi-trade crews): moderate durability, plateau on the growth curve; multi-trade experience is the asset that takes longest to replicate. Perceived (responsiveness, the "difficult work" reputation): real but undocumented, fragile, depends on personal relationships not institutional evidence. Reputational: not evidenced during this analysis. Emotional (senior attention, direct relationships): individual-level loyalty, not transferable, eroding as buyer-side staff turn over.

The combination hardest to replicate is full-chain delivery plus difficult-route specialism plus multi-trade crews in three corridors, where the breadth of competence across civils, splicing, blown fibre and testing takes years to develop.

Part 3: Focus and Direction

The survival minimum. Retain your existing workforce. Hold existing customer relationships through the FTTH build decline. Maintain accreditation and compliance currency. Produce

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documented evidence of work quality. Without these four, market position erodes regardless of other investment.

The winning conditions. Secure maintenance and remediation subcontract packages through existing Tier 1 relationships, diversifying revenue away from new-build dependence (O1). Reduce customer concentration below 40% from any single buyer within 18 months (W2). Enter at least one adjacent market with a signed contract within 12 months (O2). Build an inbound channel generating at least one qualified enquiry per month within 12 months (W3).

Direction. Niche deepening first, diversification second. Deepen position in growing segments (maintenance, remediation, recovery) using existing capabilities, while building commercial infrastructure for adjacent market entry over 18 to 36 months. Aggressive national growth is not supported by scale or budget.

Defensibility. What is defensible today: experienced multi-trade crews in three corridors, where the competence combination takes years to develop. A competitor entering your geography needs 12 to 18 months to recruit, train and accredit an equivalent workforce. What is not yet defensible: your market position. No documented track record, no inbound channel, no positioning in the growth segments. The strategy must build commercial defences around the operational base before market contraction removes the time to do so.

Constraint location. The binding constraint is on the demand side. Operational capability exceeds the volume of work you can win; the bottleneck is converting capability into visible, verifiable evidence that reaches buyers at the procurement decision point. This is a market constraint: the offer construction process applies.

Part 4: Cross-Reading

SO combinations. S1 + O1: full-chain capability maps directly to maintenance requirements, making you a higher-value subcontractor for Tier 1 framework holders. S2 + O5: recovery packages are the first redistributed as supply chains restructure. S4 + O3: geographic alignment with potential Borough Fibre packages. S5 + O4: multi-trade delivery without coordination overhead slots easily into restructured supply chains.

ST combinations. S1 + T4: delivering complete route sections gives buyers a reason to pay for value rather than default to lowest day rate. S5 + T1: redeploying crews into maintenance and adjacent civils without retraining is a structural advantage as new-build declines.

WO combinations. W1 + O1: the maintenance segment is growing, but without case studies you cannot demonstrate capability to Tier 1 panels. W4 + O4: when mergers trigger panel re-tendering, the documentation gap means you compete on relationships alone.

WT interactions. W2 + T1: the most dangerous combination. Declining new-build volumes hit your dominant revenue stream directly, with no diversified base to absorb the impact. W1 + T5: the documentation gap widens as buyer expectations increase. W3 + T2: fewer buying entities and no pipeline visibility mean lost accounts surface after the decision, not before. W6 + T4: rate compression passes straight through to margin with no value-capture mechanism.

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Section IV: Marketing Goals and Objectives

MARKETING GOAL 1: Become the subcontractor of choice for maintenance, remediation and difficult-route fibre work in your three corridors

- **Anchor:** Winning condition. Secure maintenance and remediation subcontract packages through Tier 1 relationships, diversifying away from new-build dependence.
- **Focus:** Niche deepening first, diversification second.
- **Time horizon:** 12 months (June 2026 to May 2027)

Objective 1.1: Present the core offer proposition to at least six target buyers and convert at least two to signed packages

- **Metric:** Offer presentations made; signed packages (minimum 50,000 pounds each)
- **Target:** 6 presentations; 2 signed packages
- **Baseline:** Zero. No offer presentations or maintenance packages.
- **Deadline:** September 2026 (presentations); March 2027 (packages)
- **Responsible:** Owner
- **Dependencies:** Prequalification pack (Objective 2.1) and case studies (Objective 2.2) completed. Tier 1 relationships active.
- **Priority:** Critical

Objective 1.2: Reduce single-customer revenue concentration below 40%

- **Metric:** Revenue from largest customer as percentage of annual total (quarterly, rolling 12 months)
- **Target:** Below 40%. Leading: three prospects outside top customer by December 2026.
- **Baseline:** 25-50% (to be measured precisely in Month 1 from accounts)
- **Deadline:** May 2027 (trailing indicator)
- **Responsible:** Owner
- **Dependencies:** New relationship secured (Objective 1.1 or 1.3). Pipeline tracking established (Objective 2.5).
- **Priority:** Critical

Objective 1.3: Win at least one signed contract in an adjacent infrastructure market

- **Metric:** Signed contracts in battery-storage and solar civils, water-utility minor civils, or data centre campus connectivity (the three adjacent priorities set out in the Appendix). EV charging civils is excluded from this objective on appendix grounds.
- **Target:** 1 contract (minimum 25,000 pounds)
- **Baseline:** Zero contracts outside telecoms civils
- **Deadline:** March 2027
- **Responsible:** Owner (commercial), Operations Director (delivery scoping)
- **Dependencies:** Target market identified (Stage 4). Transferable case study available (Objective 2.2).
- **Priority:** High

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MARKETING GOAL 2: Build the commercial infrastructure that makes operational capability visible to buyers before the procurement decision

- **Anchor:** Survival minimum. Produce documented evidence of work quality. Hold customer relationships.
- **Focus:** Constraint removal (market)
- **Time horizon:** 9 months (June 2026 to February 2027)

Objective 2.1: Produce an offer-led prequalification pack meeting Tier 1 documentation standards

- **Metric:** Pack completed and submitted to at least two Tier 1 framework holders
- **Target:** Pack completed; 2 submissions
- **Baseline:** No structured prequalification pack exists.
- **Deadline:** August 2026 (pack); September 2026 (submissions)
- **Responsible:** Owner, external design support if needed
- **Dependencies:** Case studies (Objective 2.2). Accreditation and insurance current.
- **Priority:** Critical

Objective 2.2: Document four completed projects as structured case studies with measurable outcomes

- **Metric:** Completed case studies (scope, challenge, solution, measurable outcome, client permission)
- **Target:** 4 case studies
- **Baseline:** Zero published case studies
- **Deadline:** End of July 2026
- **Responsible:** Owner (selection, permissions), Operations Director (technical detail)
- **Dependencies:** Client permission. Photography or site documentation available.
- **Priority:** Critical

Objective 2.3: Update the website with case studies, core offer messaging, and a tracked enquiry form

- **Metric:** Website live with case studies, offer messaging, and tracked enquiry form
- **Target:** Live; at least one tracked submission per month
- **Baseline:** None of these on current site.
- **Deadline:** September 2026
- **Responsible:** Owner (content), external web developer (build)
- **Dependencies:** Case studies (Objective 2.2). Offer proposition finalised (Stage 4, Section V-G).
- **Priority:** High

Objective 2.4: Publish at least one LinkedIn post per week showing competitive strengths and completed work

- **Metric:** LinkedIn posts per week (company page)
- **Target:** 1 per week (sustained)
- **Baseline:** Occasional unstructured posts. No schedule.
- **Deadline:** August 2026 (weekly rhythm established)
- **Responsible:** Owner or delegated team member
- **Dependencies:** Case studies and photography (Objective 2.2). Themes from Section III strengths.
- **Priority:** High

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Objective 2.5: Generate at least one qualified inbound enquiry per month

- **Metric:** Monthly inbound enquiries not from outreach (tracked by source)
- **Target:** 1 per month (sustained)
- **Baseline:** Zero. All customers from relationships, referrals or outreach.
- **Deadline:** December 2026
- **Responsible:** Owner
- **Dependencies:** Website (Objective 2.3). LinkedIn active (Objective 2.4). Source tracking established.
- **Priority:** High

MARKETING GOAL 3: Protect and deepen existing customer relationships so retention becomes brand-driven

- **Anchor:** Survival minimum. Hold customer relationships through FTTH build decline. Retain workforce.
- **Focus:** Multi-trade crews are defensible; market position is not yet.
- **Time horizon:** 12 months (June 2026 to May 2027)

Objective 3.1: Implement structured quarterly reviews covering all active accounts

- **Metric:** Active accounts contacted through structured review (not operational calls) quarterly
- **Target:** 100% of active accounts reviewed quarterly
- **Baseline:** No formal tracking. Retention approximately 70%, programme-driven.
- **Deadline:** August 2026 (established); November 2026 (first cycle completed)
- **Responsible:** Owner
- **Dependencies:** Account list compiled. Tracking method in place.
- **Priority:** High

Objective 3.2: Increase customer retention from approximately 70% to 80%

- **Metric:** Retention rate (customers active in prior 12 months who reorder in the current period)
- **Target:** 80%
- **Baseline:** Approximately 70% (estimated). Precise baseline in Month 1.
- **Deadline:** May 2027
- **Responsible:** Owner
- **Dependencies:** Contact programme operational (Objective 3.1). Order tracking in place.
- **Priority:** High

Objective 3.3: Attend at least three industry events, generating one new relationship per event progressing to a capability conversation

- **Metric:** Events attended; new contacts progressing to capability conversation within 30 days
- **Target:** 3 events; 3 capability conversations
- **Baseline:** Ad hoc attendance. No structured approach.
- **Deadline:** May 2027
- **Responsible:** Owner
- **Dependencies:** Offer and case studies available as follow-up material (Objectives 2.1, 2.2).
- **Priority:** Medium

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Goal-to-Strategy Traceability Matrix

Goal	Anchor	Direction	Stage 4 strategy elements (expected)	Continuity
Goal 1: Subcontractor of choice for maintenance and difficult-route work	Winning condition: Maintenance packages, reduce concentration, adjacent market	Niche deepening, then diversification	Target: Tier 1 holders, adjacent buyers. Product: Full-chain via core offer. Pricing: Value-based. Distribution: Offer presentations, direct. IMC: Offer-led prequalification, case studies.	Discontinuous
Goal 2: Commercial infrastructure converting capability into evidence	Survival minimum: Documented evidence, hold relationships	Constraint removal (market)	Target: All segments. Product: Case studies, prequalification, website, LinkedIn. Distribution: Digital weekly, submissions. IMC: Offer-led content, inbound channel.	Discontinuous
Goal 3: Protect and deepen existing relationships	Survival minimum: Hold relationships, retain workforce	Defensive	Target: Existing base. Product: Structured contact, events. Distribution: Direct, events. IMC: Quarterly reviews, 3 events.	Continuous

Strategy elements show expected directions; actuals updated after the marketing strategy stage is complete.

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Section V: Marketing Strategy

Target Market Selection

Around 60% of your revenue flows through a single buyer type, and that buyer type's primary programme is contracting. Selecting target markets is therefore a survival question before it becomes a growth question. The segmentation below defines who you are selling to, how each group buys, and where your position is strongest or weakest.

Primary Target Market: Tier 1 Principal Contractors Procuring Maintenance, Remediation and Difficult-Route Subcontract Packages

Industry and sector: UK telecoms infrastructure, specifically fibre-to-the-premises network maintenance, remediation, fault repair and difficult-route civils.

Company size and ownership: Revenue typically 50 million to 900 million pounds. Private equity-backed or group-subsidiary structures (Orchard Civils Group, Cirreva UK Ltd, Meridian Group Services). HHG is smaller and contracting but retains Tier 1 status.

Location: Active programmes across the Midlands, South East and East of England, your three operating corridors.

Procurement frequency and urgency: Framework-based procurement on rolling cycles, with call-off packages issued at short notice when programme schedules shift or panel capacity is stretched. Maintenance and remediation packages are recurring and programme-linked, not one-off.

Decision structure: The build manager or delivery manager identifies the need and shortlists candidates. Procurement or the commercial team runs prequalification (pass/fail gate on accreditation, insurance, accounts, case studies). The commercial manager or programme director approves the appointment. The civils lead or site supervisor uses the service.

Decision criteria (in approximate buyer weighting): Health and safety compliance (pass/fail), documented past performance, price and rates, available capacity and mobilisation speed, technical capability across trades, financial stability, and reporting and compliance capability.

Relationship model: Panel-based with repeat work for performers. Retention is programme-driven at approximately 70%; loyalty attaches to individuals (build managers), not to brands.

Client strategy: These buyers need subcontractors who satisfy procurement requirements and deliver under programme pressure. Their stated priority is delivery confidence, but their procurement process filters on documentation first. The gap between what they want and what their process selects is the opening.

Secondary Target Market: Adjacent Infrastructure Buyers Procuring Civils Subcontract Packages (Battery-Storage and Solar, Water-Utility Minor Civils, Data Centre Campus Connectivity)

Industry and sector: Battery-storage and solar farm civils, water-utility minor civils under the AMP8 capital programme, and data centre campus connectivity. Early to mid growth across all three: data centre construction is projected at 16.9% compound annual growth to 2031; grid-scale battery storage capacity grew 45% in 2025; AMP8 totex is GBP 104 billion approved over 2025-2030. EV

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charging civils, although named in the original brief, is deferred pending resolution of the electrical-partner and grid-connection issues identified in the Appendix.

Company size and ownership: Mixed. EPC contractors on battery and solar projects, regional and Tier 1 main contractors on water frameworks, and Tier 1 data-centre main contractors on campus builds. Buyer entities for civils subcontracting are typically the managing contractor on the infrastructure programme, not the end client.

Location: Solar and battery deployments concentrated in the Midlands and East; water-utility minor civils aligned with regional utility geographies in your operating corridors; data centre work concentrated in outer London and the Midlands. Substantial overlap with your three corridors.

Procurement frequency and urgency: Project-based rather than framework-based. Procurement cycles are shorter and less formalised than telecoms Tier 1 frameworks, but increasingly adopting structured prequalification as the sectors mature.

Decision structure: Project manager or construction manager raises the need. Procurement (where it exists as a function) checks credentials. The project director or client-side representative approves. Less layered than telecoms Tier 1 procurement, with faster onboarding cycles.

Decision criteria: Relevant civils experience (transferable, not necessarily sector-specific), health and safety compliance, capacity, price, and geographic proximity to the site. Reporting expectations are rising but remain below telecoms Tier 1 standards.

Relationship model: Project-to-project rather than framework-based. Repeat work follows performance but is not structurally locked in through panels. Switching costs for the buyer are lower.

Client strategy: These buyers need competent civils subcontractors and are less encumbered by the documentation-heavy procurement processes of telecoms frameworks. Your full-chain capability (ducting, excavation, reinstatement, cabling, testing) transfers directly. The barrier is visibility: these buyers do not know you exist, and you have no track record in their sector.

Segmentation Validation

The isolation test asks whether pricing and volume can be managed independently in each segment. The answer is yes on both counts.

Pricing: Tier 1 telecoms maintenance packages are priced through framework rate cards or negotiated package rates, governed by the principal contractor's commercial terms. Adjacent infrastructure work is priced project by project, typically through competitive tender or direct negotiation. Neither pricing mechanism constrains or determines the other.

Volume: Maintenance and remediation volumes are driven by the installed fibre base and operator programme schedules. Adjacent infrastructure volumes are driven by clean-power deployment policy, water-utility AMP8 spend phasing and data centre investment cycles. These demand drivers are structurally independent.

The two segments therefore operate as distinct markets for planning, pricing and resource allocation purposes.

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How Each Segment Perceives Value at Current Pricing

Primary segment (Tier 1 maintenance and remediation):

- *Getting more than they pay for:* Existing customers who benefit from your multi-trade capability, rapid mobilisation and senior operational involvement at cost-plus rates that do not reflect these advantages. They receive programme certainty and coordination-risk elimination priced as commodity labour.
- *Buying reluctantly with no practical alternative:* Build managers who need a subcontractor for a difficult or stalled route, know their panel contractors are committed elsewhere, and engage you through direct contact because no other regional firm handles recovery work at short notice. They would prefer a documented, panel-approved option but none is available.
- *Priced out entirely:* Smaller operators or contractors who need civils subcontracting but cannot justify the minimum mobilisation cost for a full-chain crew. These buyers default to single-trade day-rate labour or in-house teams.

Implication: The first group represents immediate revenue at risk of under-capture. Value-based pricing on difficult-route and recovery packages, supported by documented performance metrics, could close the gap between what you deliver and what you charge. The second group is the conversion target for the core offer: remove their reluctance by providing the documentation their procurement process demands.

Secondary segment (adjacent infrastructure):

- *Getting more than they pay for:* Not yet applicable; you have no contracts in this segment.
- *Buying reluctantly with no practical alternative:* Project managers assembling civils teams from unfamiliar subcontractors in a sector where established supply chains are still forming. Switching between suppliers is common because no dominant regional provider has emerged.
- *Priced out entirely:* Early-stage developers testing commercial viability who cannot commit to the minimum package sizes a multi-trade crew requires.

Implication: The reluctant-buyer group is the entry point. In a market without entrenched supply chains, a documented, accredited civils subcontractor with transferable telecoms experience can establish relationships before the procurement structures harden.

Purchase Decision Mechanism by Segment

Role	Primary segment (Tier 1 maintenance)	Secondary segment (adjacent infrastructure)
Initiates	Build manager or delivery manager (identifies capacity gap or need)	Project manager or construction manager (scopes civils package)
Influences	Civils lead, site supervisor (field-level recommendation)	Site supervisor, health and safety manager
Decides	Commercial manager or programme director (approves appointment)	Project director or client representative
Pays	Principal contractor (against framework or package terms)	Managing contractor or developer (against project budget)

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Role	Primary segment (Tier 1 maintenance)	Secondary segment (adjacent infrastructure)
Uses	Civils lead, site supervisor, programme team (receives the work)	Site team, project delivery team

Market Classification by Segment

Primary segment (Tier 1 maintenance and remediation): Contested ground. Orchard Civils and Cirreva hold the maintenance frameworks and control package allocation to subcontractors. Northgate Civils and Severn Fibre Group compete for the same subcontract packages in overlapping corridors. You have active relationships with Tier 1 buyers and a track record on difficult-route work, but no documented evidence base, no formal panel position, and no maintenance-specific case studies. This is not unclaimed territory: the frameworks exist and competitors are present. It is also not your territory yet: retention is programme-driven, not loyalty-driven, and your position depends on personal relationships that could transfer to a competitor with better documentation.

Secondary segment (adjacent infrastructure): Unclaimed territory. No dominant regional civils subcontractor has emerged in battery-storage and solar civils, water-utility minor civils, or data centre campus connectivity across your corridors. Procurement structures are still forming. The risk is that you enter a market where demand is growing but buyer relationships and procurement norms are unfamiliar. The advantage is that early entry, supported by transferable case studies and accreditation, establishes a position before the supply chain consolidates.

Branding and Positioning

Current Brand Assessment

Seventy percent of your repeat work comes through programme allocation rather than active selection by buyers. That pattern means your brand, such as it exists, functions as a passive confirmation tool rather than an active demand generator.

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Your current brand assets: a logo, professional photography, a website, and intermittent LinkedIn activity. No case studies, no formal sales collateral beyond a basic brochure, no documented performance history. The competitive gap this creates is specific: Northgate Civils holds ISO triple certification (9001, 14001, 45001) and Severn Fibre Group maintains polished outbound materials with explicit turnkey positioning. Your brand communicates presence but not proposition.

Market perception splits between two audiences. Build managers who have worked with you trust the delivery; their confidence attaches to named individuals rather than to Example Ltd as an entity. Procurement teams who have not worked with you see documentation that meets minimum thresholds but communicates nothing distinctive. The brand, in practical terms, is invisible at the decision point that matters most.

Positioning Strategy

No regional competitor currently positions explicitly in route recovery or stalled-build remediation. That gap is your positioning territory.

The desired position: the subcontractor you appoint when the route is difficult, the programme is behind, or the previous contractor failed to complete. This sits adjacent to but distinct from turnkey FTTH delivery (Severn Fibre Group' territory) and certified quality systems (Northgate Civils's territory).

The evidence supporting achievability: you already deliver this work. Multi-trade crews, senior operational involvement on live sites, and rapid mobilisation capacity are operational realities, not aspirations. The gap is not between capability and claim; it is between capability and documentation of capability.

How What You Offer, How You Deliver, and the Combination Interact

What you offer is strong: full-chain FTTH delivery across civils, splicing, blown fibre, overhead cabling, testing and reinstatement, plus geographic coverage across three corridors and difficult-route specialism. On the range of services provided, you match or exceed every regional competitor.

How you deliver is also strong: rapid mobilisation, senior staff on site rather than remote project management, multi-trade crews reducing coordination failures. Build managers confirm this through repeat appointment.

The combination breaks at one specific point. Buyers cannot see the delivery quality at the procurement decision stage. Your execution is real but undocumented. In a market where procurement increasingly weights documentation and delivery confidence alongside price, strong delivery with weak evidence produces the same outcome as weak delivery: you are filtered out before your operational strengths become visible.

The fix is not to change what you do or how you do it. It is to make the delivery quality visible in the formats procurement teams consume: case studies, completion data, named service descriptions, published metrics.

Brand Strategy Decisions

Single brand. At £9m revenue with 51 to 200 staff and two depots, multiple brands would fragment limited marketing resource across audiences who overlap. Tier 1 principal contractors and adjacent infrastructure buyers both purchase subcontract delivery capability; they do not require separate brand identities.

Brand alliances: not applicable at this stage. Your relationship with Tier 1 firms is supplier-to-buyer, not peer-to-peer. Co-branding implies parity that does not exist in the current commercial structure.

Brand equity protection: the equity sits in individual reputations (named project leads, named supervisors). The task is to transfer that individual-attached trust onto the company entity through documented evidence, so that Example Ltd retains commercial value independent of any single employee's tenure.

Positioning Statement

For Tier 1 principal contractors who need subcontract partners on routes where standard delivery has failed or where programme recovery is required, Example Ltd provides full-chain FTTH delivery with multi-trade crews and senior operational involvement on site, differentiated by documented completion performance on difficult routes and a named recovery service tier that no regional competitor currently offers.

Product Strategy

Between 50% and 75% of your revenue comes from a single service category, FTTH new-build, declining at an estimated 25 to 30% year on year. That fact shapes every product decision below.

Portfolio Assessment

Your service portfolio currently breaks down as follows:

FTTH new-build packages (civils, splicing, blown fibre, overhead cabling, testing, reinstatement): estimated 50 to 75% of revenue. Dominant generator but declining. Still funds everything else short-term, yet cannot remain the primary growth engine.

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Maintenance and remediation work: estimated 15 to 30% of revenue. Growing 5 to 10% annually, aligning directly with your primary target market.

Ad-hoc and smaller jobs: estimated 5 to 10% of revenue. Low growth, limited planning weight. These keep you visible to buyers between larger contracts.

Adjacent infrastructure (battery-storage and solar civils, water-utility minor civils, data centre campus connectivity, with EV charging civils on a watch list): zero revenue currently. Growth potential is strong (battery storage capacity up 45% in 2025; AMP8 water totex up 71% on the prior period to GBP 104 billion; data centre construction at 16.9% compound annual growth to 2031), but activation requires new accreditations and client relationships.

Two additional categories apply. Route recovery acts as a price-level signal: it communicates specialist capability and justifies premium positioning even before it generates volume revenue. Maintenance stimulates purchase of other services, because clients who see consistent remediation delivery are more likely to award larger packages.

Concentration Risk

Your single-customer concentration sits at 25 to 50% of revenue. Combined with 50 to 75% dependence on a declining service category, the risk compounds: if new-build volumes keep falling and your largest customer reduces spend proportionally, a 15 to 30% revenue reduction within 18 to 24 months is plausible without corrective action.

Product Lifecycle Positioning

Service	Lifecycle stage	Marketing investment implication
FTTH new-build	Late growth to early maturity	Defend margin; do not chase volume at discount
Maintenance and remediation	Early growth	Invest in awareness and positioning
Route recovery	Introduction	Build the category; educate buyers
Adjacent infrastructure	Pre-revenue pipeline	Selective investment; prove capability on pilot projects

Product Development Direction

The evidence points toward deepening your niche first, selective diversification second.

Evidence for focusing:

Your competitive advantage (experienced multi-trade crews, 12 to 18 months to replicate) is directly transferable to maintenance and remediation without new capability investment. Your constraint is market-side demand, not operational capacity. Adding unrelated services does not solve a demand problem. Route recovery as a named, measurable service has no equivalent from regional competitors. This is an opportunity to own a category before others enter.

Evidence against premature diversification:

HHG's revenue decline from £73m to £51m correlates with geographic over-extension without maintaining delivery quality. The parallel risk for you: service-line over-extension with the same

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crews. Adjacent infrastructure requires accreditations and client relationships you do not yet hold. Moving too early dilutes focus on the maintenance and remediation opportunity available now.

Recommendation: concentrate marketing investment on maintenance, remediation and route recovery for the next 12 months. Begin adjacent-infrastructure pilots opportunistically but do not market them as a primary offering until at least one completed project provides reference evidence.

Competitive Product Gaps

Services competitors offer that you do not: Northgate Civils provides highway maintenance and paving. Cymru Network Solutions and Atlas Telecoms UK Ltd operate training academies. Severn Fibre Group holds PIA accreditation and produces polished marketing collateral. Of these, PIA accreditation is the most relevant gap to close: it signals to operators that your teams can work within their physical infrastructure access framework without additional supervision.

Services competitors have tried and failed at: HHG's over-extension into multiple geographies without maintaining delivery quality resulted in a £22m revenue decline. No other documented failures at the regional tier were identified during this analysis.

Unmet customer needs no competitor addresses well: No regional subcontractor currently tracks or publishes mobilisation time, first-time completion rate, or defect-return rate. No regional competitor positions explicitly in route recovery as a named, accountable service. Both gaps align with the proposed core offer: full-route delivery plus published performance metrics.

Pricing Strategy

Every job you deliver, whether a routine splice or a programme-saving route recovery, currently leaves the buyer's finance system at the same unit rate. That is the largest uncaptured margin opportunity in your business.

Current Pricing Assessment

Your pricing model is cost-plus with margin loaded onto day rates or package rates. Costs go in, a percentage sits on top, the price comes out. The mechanism works, but it cannot distinguish between work that is easy to source elsewhere and work that only you can credibly deliver.

A week's delay on a recovery route costs the principal contractor far more in programme penalties than the subcontract price of completing that route. Yet your current pricing treats recovery work identically to a standard duct installation on a clear verge. The buyer pays the same rate. You leave the value difference on the table.

Recommended Pricing Approach

Split pricing into two tiers, matched to the two target markets.

Standard framework work (Tier 1 maintenance, routine build packages): price competitively within rate-card structures. This is elastic work with multiple credible alternatives. Win on the combination of price, multi-trade convenience, and documented delivery confidence. Price at or marginally above market median, never below.

Recovery and difficult-route work: price at a premium to standard build rates, reflecting the programme recovery value to the buyer rather than your input cost. Few alternatives exist at short notice, the buyer's cost of failure far exceeds the premium, and pricing at standard rates actively undermines the claim that this work requires specialist capability.

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A practical starting point: 15 to 25% above standard framework rates for named recovery-tier assignments, with the premium attached to a defined service specification (mobilisation speed, senior supervision, completion reporting) rather than presented as an unexplained uplift.

Three Forces in Tension

Positioning signal. If recovery work costs the same as what every other subcontractor charges, why would procurement believe it is different? The premium is not just revenue; it is a positioning mechanism.

Margin requirement. At current rates, your margins provide limited buffer against volume decline in new-build. The recovery premium compensates for rate compression on standard work, protecting profitability without requiring you to fight rate-card battles you cannot win against larger competitors.

Selling pressure. Your commercial conversations happen at site level and through existing relationships. The instinct when a buyer queries the premium will be to revert to standard rates. That instinct, repeated across enough jobs, collapses the two-tier structure entirely. The discipline: the premium attaches to a defined service specification, not a negotiable surcharge. If the buyer does not want the recovery-tier specification, they receive standard-tier pricing and standard-tier service. It is a different product at a different price, not a discount waiting to happen.

Segmented Pricing and the Fairness Test

Your two target markets are structurally isolated: different buyers, different procurement processes, independent pricing visibility. A Tier 1 maintenance framework manager will not see your adjacent-infrastructure project quotes. Segmentation is operationally feasible.

The fairness test: would the framework buyer paying standard rates say "fair enough" if they saw the recovery premium? Yes, provided the premium attaches to a visibly different service (faster mobilisation, senior staff, completion reporting the standard tier does not include). The higher price buys something the standard price does not. That passes.

Contribution Perspective

Your constraint sits in the market, not in operations: crew capacity exceeds current work won. When capacity is idle, any work priced above truly variable costs (materials, subcontract labour, direct travel) increases profit, regardless of whether it covers full depot overheads or management time.

This reframes adjacent-infrastructure pricing specifically. Project-based work in battery-storage or solar civils, water-utility minor civils, or data centre campus connectivity, where you lack track record, can be priced at variable-cost-plus-contribution to win initial reference projects. Conditions: this applies only to the adjacent segment (isolated from framework buyers), only while excess capacity exists, and only where contribution is genuinely positive. It is not a licence to discount framework work; it is a mechanism to deploy idle crews profitably while building the evidence base for full-rate pricing later.

The risk boundary: if adjacent work begins consuming capacity that framework or recovery work would otherwise fill, contribution pricing stops. The test is simple: are crews sitting idle, or are they being diverted?

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Distribution Strategy

Every contract Example Ltd has ever won arrived through a personal relationship, a referral, or direct outreach by a senior person. No agents, no brokers, no intermediaries. In a sector where procurement runs through multi-year frameworks controlled by a handful of Tier 1 firms, that model is both a strength and a structural exposure.

How Work Currently Reaches You

Three layers: network operators (Britlink Networks, altnets) award frameworks to Tier 1 contractors (Orchard Civils, Cirreva, Meridian Group, HHG), who subcontract packages to regional firms like yours. You do not bid for operator frameworks directly. Those Tier 1 firms are simultaneously your customers and your distribution channel; work arrives because a build manager knows your name or has been referred by someone who does.

For adjacent infrastructure buyers (battery-storage and solar EPCs, water-utility Tier 1 contractors, data-centre main contractors), no route to market exists yet. You have no relationships in these sectors.

Direct Delivery or Intermediaries

Should you continue reaching buyers directly or introduce an intermediary? The case for staying direct is strong on every test. The personal relationship between your senior people and build managers is the mechanism that wins packages, especially difficult-route and recovery work where trust outweighs price. An intermediary cannot replicate that. Your advantage rests on delivering multiple trades as one package and on specialist regulatory knowledge (NRSWA, Britlink Networks standards, PIA); a third party would represent only a fraction of either. Speed of response, mobilising within days when a route stalls, disappears the moment someone else manages the relationship.

The budget (20,000 to 50,000 pounds) is sized for direct commercial development, not for funding a broker network. Coverage capacity is limited (owner plus a small team who also run operations), but the requirement is equally limited: named Tier 1 buyers and a manageable set of adjacent-sector contacts.

Conclusion: direct delivery, no intermediaries. Consistent with your current model and B2B subcontracting norms in this sector.

Channel Strategy by Segment

For the primary segment (Tier 1 maintenance and remediation), the channel is the existing relationship with Tier 1 buying entities, strengthened by a prequalification pack, case studies and regular contact with named decision-makers. Your task: be on the shortlist when call-offs and package allocations are decided.

For the secondary segment (adjacent infrastructure), the channel must be built from nothing. These buyers do not know you exist. The route is direct outreach plus a web presence showing transferable civils capability, case studies and tracked enquiry capture.

Where to Invest: Supply Chain Effort or End Demand

For the primary segment, supply chain effort comes first. The buying decision sits with Tier 1 firms; general visibility will not change how framework work is allocated. Effort goes into direct presentations to named buyers, supported by evidence satisfying their procurement process.

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For the secondary segment, the balance shifts toward generating end demand. These markets lack the rigid framework layer; buyers are assembling supply chains in real time. A credible web presence and targeted outreach can generate enquiries from project managers actively searching for civils subcontractors.

Corporate Strategy Alignment

No change in integration direction is planned; you intend to bring commercial management in-house rather than outsource customer-facing activity. The distribution strategy is consistent: direct relationships managed by your own people, no dependency on external agents or intermediaries.

Integrated Marketing Communications Strategy

Under five thousand pounds a year on marketing, no CRM, no analytics, and every customer won through personal contact. The strategy below works within a 20,000 to 50,000 pound budget where the owner is the primary commercial resource.

Communication Objectives

First, make the core offer visible to Tier 1 procurement teams before they shortlist. Build managers know you; procurement teams do not, and they control the documentation gate. Second, generate at least one inbound enquiry per month from buyers you have not contacted directly. Third, reinforce retention through structured contact, shifting the current 70% renewal rate from programme-driven to relationship-driven.

Channel Selection

Build managers and delivery managers use LinkedIn professionally: checking supplier profiles, reading industry updates, following project announcements. At procurement stage, they check credentials through supplier portals and prequalification documentation. They read trade press selectively (ISPreview, industry newsletters). No regional competitor runs a structured content programme or publishes performance data. The gap is in channel use, not channel presence: nobody treats digital content as a commercial tool.

Your current capability is basic: a website that does not sell and LinkedIn posts without commercial intent. The sales cycle runs months, framework-based, requiring sustained consistency rather than campaign bursts. Measurement is currently nil; basic analytics are achievable at no cost.

Primary: LinkedIn (company page and owner profile). Weekly posts showing completed work with specific metrics. The only channel where target buyers are present, competitors underperform, and consistent activity is achievable. Cost: under 2,000 pounds annually.

Secondary: website with tracked enquiry capture. Case studies, core offer messaging, and a form tracking inbound interest. Cost: 5,000 to 10,000 pounds for rebuild.

Supporting: trade events (three per year). Selected for buyer attendance. Cost: 3,000 to 5,000 pounds.

Paid advertising, social media beyond LinkedIn, and print campaigns are excluded. The budget does not support them and the audience does not require them.

Message Strategy

LinkedIn: evidence of delivery, not claims about quality. Site photos with metrics (routes completed, trades deployed, timescales met). The viewer should feel confidence this firm delivers difficult work

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competently, and follow the page or visit the website. Test: remove your name; could a competitor post the same? If yes, it is not specific enough.

Website: the core offer structured around procurement evaluation criteria: services, coverage, accreditation, case studies with outcomes. The viewer should feel this subcontractor meets prequalification standards with documented evidence, and submit an enquiry.

Events: relationship, not pitch. The contact should feel you understood their programme pressures, and agree to a follow-up within 30 days.

Promotion Mix

Ranked by expected return. **Personal selling:** highest priority; offer presentations to named Tier 1 buyers with prequalification pack and case studies. **Targeted communication:** quarterly structured contact with active accounts covering performance, capacity and relationship. **Digital content:** weekly LinkedIn, quarterly website refresh; 7,000 to 12,000 pounds annually. **Trade events:** three per year; 3,000 to 5,000 pounds. **Case studies:** four by Month 2, refreshed as projects complete.

Mass advertising and merchandising are excluded. Neither reaches decision-makers at a cost this budget absorbs.

Marketing and Commercial Handover

Marketing gives the commercial function: customer categories and target descriptions, selling arguments structured around the core offer, competitive positioning evidence, case studies and prequalification materials, inbound enquiries tracked by source.

The commercial function gives marketing: buyer priority intelligence from site meetings, feedback on which materials worked, competitive signals (who else tendered, at what positioning), pricing pressure data. Currently this intelligence stays in the owner's head. The discipline: after every buyer conversation, record what was discussed, what the buyer prioritised, and which competitor appeared. That record feeds the next quarter's content decisions.

Retention and Acquisition Balance

Retention at 70% means three in ten active accounts do not return each cycle. Improving to 80% through structured contact protects revenue that acquisition would take months to replace. Recommended split: 60% of communication effort on retention (account contact, performance reporting, relationship management), 40% on acquisition (LinkedIn, website, events, presentations). This reverses the instinct to chase new business while neglecting customers already paying.

Contact Point Assessment

Key touchpoints assessed against the difficult-route specialist positioning:

Contact point	Current state	Effect on positioning
Website	Generic, no case studies or metrics	Undermines
LinkedIn	Intermittent, no commercial intent	Neutral
Email signatures	Inconsistent across team	Undermines

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Contact point	Current state	Effect on positioning
Prequalification documents	Meet minimums only	Undermines
Site signage and van livery	Present but generic	Neutral
PPE branding	Standard	Neutral
Invoice and reporting format	Functional	Neutral (missed opportunity)
Depot presentation	Not assessed	Unknown

Priority fixes, first three months: website rebuild (Objective 2.3), prequalification pack redesign (Objective 2.1), email signature standardisation (zero cost, immediate), LinkedIn rhythm (Objective 2.4). Signage, livery and invoice formatting are secondary.

The Core Offer

Buyers who select subcontractors on documented evidence, rather than site reputation, now control the procurement gate at every major Tier 1 framework. Your delivery quality is real. The problem is that nobody who matters at the decision point can see it.

What Your Customers Keep Running Into

Three problems surface repeatedly across your buyer base, each confirmed by both the customer analysis and the competitive environment:

1. Programme disruption when subcontractor capacity disappears at short notice. Panel contractors commit to multiple programmes simultaneously. When schedules shift or a route opens unexpectedly, your buyers absorb the delay cost because no subcontractor on their panel can mobilise quickly enough.

2. Coordination failure on multi-trade routes. When blockage clearance, civils, splicing, cabling and testing are split across separate subcontractors, defects multiply at each handover point. The principal contractor carries both the coordination burden and the defect liability.

3. The procurement process filters out the contractors buyers actually want. Responsive, capable subcontractors without formal evidence packs (case studies, published metrics, accreditation records) are removed at prequalification. Buyers know this produces worse outcomes but cannot override their own procurement rules without documented justification.

The Conflict Behind These Problems

Your buyers need two things at the same time: a subcontractor who mobilises quickly, adapts to programme changes and handles difficult routes without layers of approval; and documented evidence, structured reporting and accreditation records that satisfy internal procurement requirements.

The market currently forces a choice. Large, well-documented contractors pass procurement but respond slowly. Smaller, responsive contractors deliver on site but fail at prequalification. The hidden assumption creating this conflict is that responsiveness and documentation are trade-offs, that a subcontractor fast enough to recover a stalled route cannot also produce the evidence trail procurement demands. That assumption is wrong, but only if someone builds the evidence infrastructure to prove it.

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What the Industry Does That Keeps the Problem Alive

Five standard practices across the regional subcontracting market reinforce the conflict:

- Framework procurement weights documentation over delivery track record, and no industry standard exists for measuring responsiveness or completion quality; the qualities buyers value most cannot be verified at the selection stage.
- Cost-plus rate-card pricing treats all subcontractors as interchangeable, removing any price signal for quality, speed or first-time completion.
- Difficult routes are fragmented across multiple trade subcontractors, creating coordination cost and defect multiplication at every interface.
- Panel structures penalise onboarding new suppliers, deterring buyers from adding responsive alternatives even when existing panel capacity is stretched.

No regional competitor currently challenges any of these practices.

What Example Ltd Will Do Differently

The offer has three elements, packaged as a single proposition:

Single-contractor, full-route delivery. Civils, blockage clearance, reinstatement, splicing, blown fibre, overhead cabling, testing and sign-off under one contract. No trade interfaces. One point of responsibility. This eliminates coordination failure on multi-trade routes.

Published performance metrics. Tracked and documented: mobilisation time (enquiry to crew on site), first-time completion rate on standard and difficult routes, defect-return rate, programme milestone adherence. Published in formats that satisfy procurement evidence requirements. This closes the gap between delivery quality and procurement visibility.

Route recovery as a named service tier. Positioned for routes that have failed, stalled or been abandoned by another subcontractor. Priced to reflect programme recovery value, not cost-plus day rates. Available at short notice with a committed response window.

A competitor replicating this combination would need full-chain delivery capability (civils through testing) under one management structure, street-works-qualified crews across three geographic corridors, and a documented track record in route recovery. At current labour market conditions, that replication window is an estimated 12 to 18 months.

Objections and Safeguards

"Your metrics will look bad in the early months." They might. The commitment is to publish them regardless, not to claim perfection. Buyers value transparency over inflated numbers, and the competitive advantage is that you publish at all; no regional competitor does.

"Recovery-tier pricing is too high for our framework rates." The premium (15 to 25% above standard rates) attaches to a defined service specification: faster mobilisation, senior supervision, completion reporting. If the buyer does not want the recovery specification, standard-tier pricing applies. It is a different product at a different price.

"We already have panel contractors who cover multiple trades." Panel contractors committed elsewhere are the reason routes stall. The offer is not a replacement for your existing panel; it is the option you call when your panel cannot respond.

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"We cannot justify onboarding a new supplier mid-programme." The prequalification pack, case studies and published metrics are designed to compress onboarding timelines. The documentation that currently delays your appointment becomes the tool that accelerates it.

"What happens if your key people leave?" Published metrics and documented processes attach performance evidence to the company, not to individuals. That transfer from personal reputation to company evidence is deliberate.

How This Connects to the Rest of the Strategy

The offer targets Tier 1 principal contractors in maintenance and remediation, occupying unclaimed positioning territory. The product portfolio structures it into purchasable service levels. Two-tier pricing attaches the premium to a defined recovery specification. Direct delivery preserves the speed and accountability the offer depends on. LinkedIn, the website rebuild and the prequalification pack carry published metrics to buyers before shortlisting.

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Section VI: Marketing Implementation

Who Owns This Work

No one in your business currently owns marketing. That is the single largest barrier to everything that follows. The goals, the targeting, the positioning: none of it moves unless someone is accountable for making it happen week to week.

You do not need a marketing department. A business of your size needs one person with explicit ownership of commercial development, reporting directly to you, with protected time and a defined brief. This is not a hire you make on day one. For the first 90 days, you hold this role yourself, supported by an external supplier for content production (case studies, website, LinkedIn). By month four, you either delegate internally to a commercially minded project coordinator or engage a fractional marketing manager for 1-2 days per week.

The structural change is modest: assign the role, protect the time, fund the external support. The risk of not doing it is that marketing becomes the thing everyone agrees matters and nobody does.

Decision rights across tactical activities

For each major activity area, the table below sets out four roles: who does the work, who is answerable for the outcome, who should be consulted before decisions are taken, and who needs to be kept informed of progress. Roles are used rather than names so this structure survives any personnel change.

Activity area	Does the work	Answerable for outcome	Consulted	Informed
Case study production	External content supplier	Owner / Commercial lead	Project managers (source material)	Operations director
Website update	Web developer (external)	Owner / Commercial lead	External content supplier	Office manager
LinkedIn content	External content supplier	Owner / Commercial lead	Field supervisors (site imagery)	All staff (reshare)
Prequalification pack	Owner / Commercial lead	Owner	Operations director, SHEQ manager	Finance
Buyer presentations	Owner	Owner	Operations director	Finance
Quarterly account reviews	Owner / Commercial lead	Owner	Project managers	Finance
Event attendance	Owner / Commercial lead	Owner	Operations director	Office manager
Enquiry tracking and response	Office manager	Owner / Commercial lead	N/A	Operations director
Pricing structure	Owner	Owner	Finance, Operations	Project managers

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Activity area	Does the work	Answerable for outcome	Consulted	Informed
(recovery premium)			director	

Tactical Activities by Area

Product and service packaging

Activity	Responsible	Indicative budget	Deadline	Success measure
Define and name the route recovery service tier as a distinct offer	Owner	Internal time only	Jun 2026	Written service description with scope, exclusions, and pricing basis
Document 4 completed projects as structured case studies	External content supplier	£3,000-£4,500	Jul 2026	4 published case studies, each with problem, method, measurable outcome
Build offer-led prequalification pack	Owner with external design support	£1,500-£2,500	Sep 2026	Pack submitted to 2 Tier 1 framework holders
Package maintenance/remediation as recurring contract offer	Owner	Internal time only	Aug 2026	Standardised package document with pricing tiers

Pricing

Activity	Responsible	Indicative budget	Deadline	Success measure
Establish standard framework rates for core services	Owner with Finance	Internal time only	Jun 2026	Published rate card, reviewed quarterly
Set and test 15-25% recovery premium on difficult-route work	Owner	Internal time only	Jul 2026	Premium applied to at least 2 quotes; win rate tracked
Build simple quote-tracking log (spreadsheet or basic CRM)	Office manager	£0-£500 (if basic CRM)	Jul 2026	All quotes logged with outcome and reason

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Distribution and channel

Activity	Responsible	Indicative budget	Deadline	Success measure
Update website: case studies, offer messaging, tracked enquiry form	Web developer (external)	£3,000-£5,000	Sep 2026	Live site with enquiry form generating tracked submissions
Set up enquiry response process: who responds, within what timeframe, with what information	Owner / Office manager	Internal time only	Sep 2026	Written response protocol; target response within 4 working hours
Attend 3 industry events in target corridors	Owner	£3,000-£5,000 (tickets, travel, materials)	May 2027	3 events attended; 1 new relationship per event documented

Communication and promotion

Activity	Responsible	Indicative budget	Deadline	Success measure
Publish 1 LinkedIn post per week from Aug 2026	External content supplier	£6,000-£9,000 (12 months)	Sustained from Aug 2026	4 posts/month minimum; engagement tracked monthly
Present core offer to 6 target buyers	Owner	Travel and materials, ~£1,500	Mar 2027	6 presentations delivered; 2 converted to signed packages (£50k+ each)
Implement structured quarterly reviews with all active accounts	Owner	Internal time only	Aug 2026	Reviews completed for all active accounts each quarter; issues logged

Indicative total budget: £18,000-£28,000 for the first 12 months, within the £20,000-£50,000 range identified. The remainder provides headroom for a fractional marketing hire from month four onwards (£8,000-£15,000 for the year at 1-2 days per week).

Sequencing: What Comes First and Why

Three phases, each building on the one before.

Phase 1: Quick wins, months 1-3 (Jun-Aug 2026). These use existing resources and produce visible, usable outputs.

- Name and define the recovery service tier (internal time, no dependency)
- Build quote-tracking log (precondition for measuring anything)
- Commission 4 case studies (needs project manager input; start early because production takes 6-8 weeks)
- Establish rate card and test recovery premium on live quotes
- Begin quarterly account reviews with existing customers
- Draft the prequalification pack content in parallel with case study work

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The logic: you cannot sell what you have not described. Case studies and the recovery tier definition create the raw material everything else depends on.

Phase 2: Structural changes, months 3-6 (Aug-Oct 2026). These require new processes or external resource.

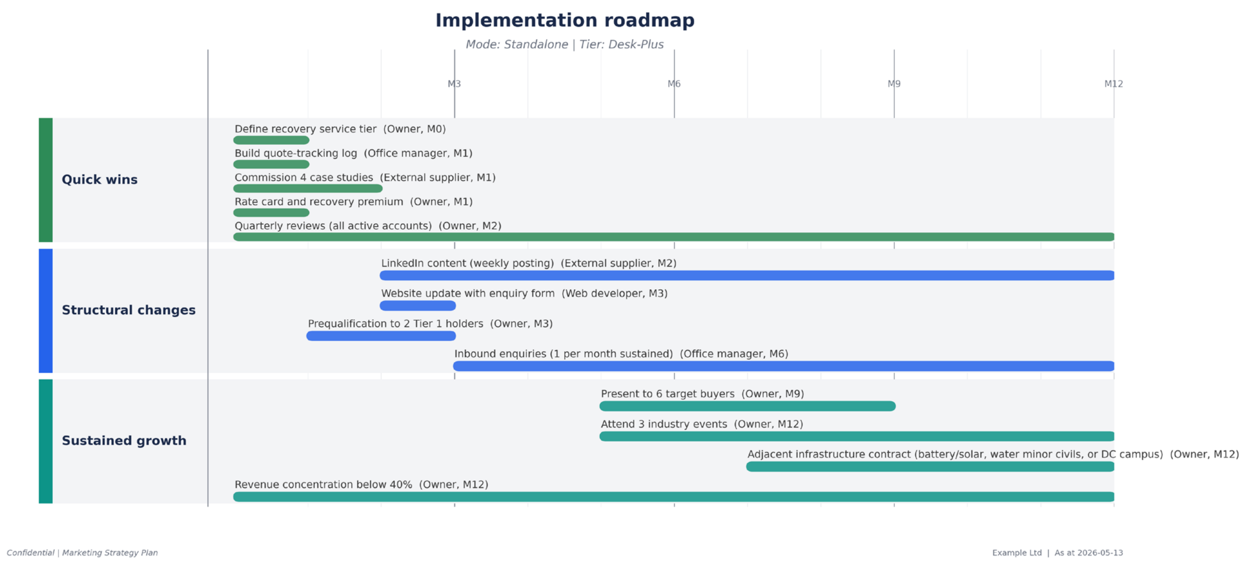
- Launch LinkedIn content (needs case studies and imagery from Phase 1)
- Update website with new messaging, case studies, and enquiry form
- Submit prequalification pack to 2 Tier 1 framework holders
- Set up enquiry response process (needs the enquiry form to be live)
- Decide on fractional marketing hire or internal delegation

The dependency chain: LinkedIn content and the website both need the case studies from Phase 1. The prequalification pack draws on case studies and the service tier definition.

Phase 3: Sustained growth, months 6-12 (Nov 2026-May 2027). These are longer-term investments that compound over time.

- Present to 6 target buyers (needs prequalification pack and case studies as leave-behind material)
- Attend 3 industry events
- Sustain LinkedIn cadence and begin measuring inbound enquiry rate
- Pursue adjacent infrastructure opportunity
- Review revenue concentration quarterly against the 40% target

Phase 3 depends on having credible evidence materials and a working commercial process.



Making It Stick: Operational Principles

Build repeatable processes, not one-off efforts

Every activity above should become a recurring process, not a project with an end date. The quarterly account review is a standing calendar item with a standard agenda. LinkedIn posting follows a content calendar refreshed monthly. Quote tracking is a daily habit, not a quarterly catchup. If any activity depends on one person remembering to do it, it will stop the first time that person is busy on site.

Measuring what matters

Seven metrics, each filtered through four questions.

Metric	What exactly is measured	Why it matters	Who owns it	What changes if the number moves
Quotes issued per month	Count of formal quotes sent	Pipeline visibility	Owner	Below 4/month: increase outreach or review targeting
Quote conversion rate	% of quotes that become signed work	Sales effectiveness	Owner	Below 25%: review pricing or qualification criteria
Revenue by customer (%)	Share of total revenue from largest customer	Concentration risk	Finance	Above 40%: accelerate new buyer pursuit
Inbound enquiries per month	Tracked form submissions + direct contact citing marketing	Marketing channel effectiveness	Office manager	Below 1/month after Dec 2026: review content or website
LinkedIn engagement rate	Likes, comments, shares per post	Content relevance	External supplier	Sustained decline: change content mix
Customer retention rate	% of accounts active year-on-year	Revenue protection	Owner	Below 80%: trigger account recovery review
Case study pipeline	Number of documentable projects in progress	Future evidence supply	Operations director	Below 2 in pipeline: brief project managers on documentation

Catching errors early

The most expensive marketing mistake for a subcontractor is promising something in a prequalification submission that operations cannot deliver. Every external-facing document (case study, prequalification pack, website copy) should be reviewed by the operations director before publication. This is a 30-minute check, not a committee. The question is simple: is this accurate, and can the business deliver what this implies?

For pricing, the recovery premium should be tested on 2-3 quotes before it becomes standard. Track win/loss against premium-priced quotes separately for the first quarter.

Customer feedback reaching the right people

Any customer comment about quality, timeliness, or scope (positive or negative) should be logged in the quote-tracking system within 24 hours by whoever received it. The owner reviews these weekly. Quarterly account reviews provide the structured opportunity to ask directly.

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Before making a change, test it

Before committing budget or time to any activity not listed here, apply a simple filter: What problem does this solve? What evidence supports it? What does it cost? What do you stop doing to make room? The discipline is in asking before committing, not after.

Two Pathways Forward

Implementing this plan independently

Everything here is designed to be executed without external support. Three dependencies to watch:

1. **Content production.** Case studies, LinkedIn posts, and website copy require a writer who understands B2B infrastructure. This is the one external resource you cannot skip. Budget £9,000-£13,500 for the year.
2. **Owner capacity.** You are currently the only commercial resource. Every hour spent on marketing is an hour not spent on site management or existing customer relationships. The fractional hire decision at month four is not optional; it is the difference between a plan that runs for three months and one that runs for twelve.
3. **Discipline on measurement.** Without the quote-tracking log and enquiry form, you will have no way to know whether any of this is working. These are the first things to build, not the last.

The risk of self-implementation is not capability. It is continuity. Marketing activities that depend on the owner's discretionary time tend to stop during busy operational periods, which are precisely the periods when the pipeline needs to be refilled for the next quarter.

The Business Invincibility programme

The alternative is a supported implementation pathway. Under this programme, I work alongside you through the execution phase: building the systems, producing the content, holding the cadence, and measuring progress against the objectives set out in this plan.

The programme typically covers 12 months, with structured monthly check-ins, content production, and quarterly reviews. If you want to discuss which pathway fits, the next step is a 30-minute conversation. No commitment required.

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Section VII: Evaluation and Control

How You Will Know This Is Working

Seven metrics were identified in Section VI. This section ties each one back to the objectives it serves, sets the trigger points that should prompt a change of approach, and establishes the review rhythm that keeps the plan honest.

Performance standards by objective

Objective	Performance standard	Data source	Frequency	Responsible
1.1 Present to 6 buyers, convert 2	6 presentations delivered; 2 signed packages at £50k+ each	Quote log, signed contracts	Monthly (presentations); quarterly (conversions)	Owner
1.2 Concentration below 40%	Revenue from largest customer as % of rolling 12-month total	Management accounts	Quarterly	Finance
1.3 Adjacent infrastructure contract	1 signed contract at £25k+ outside telecoms civils	Signed contracts	Quarterly	Owner
2.1 Prequalification pack	Pack completed; submitted to 2 Tier 1 framework holders	Submission records	One-off (Aug-Sep 2026)	Owner
2.2 Case studies	4 published, each with problem, method, measurable outcome	Published portfolio	One-off (Jul 2026)	External supplier
2.3 Website	Live site with case studies, offer messaging, tracked enquiry form	Site analytics, form submissions	Monthly	Owner
2.4 LinkedIn	1 post per week sustained from Aug 2026	LinkedIn analytics (company page)	Monthly	External supplier
2.5 Inbound enquiries	1 qualified inbound enquiry per month from Dec 2026	Enquiry log (source-tracked)	Monthly	Office manager
3.1 Quarterly reviews	100% of active accounts reviewed each quarter	Review log	Quarterly	Owner
3.2 Retention	Retention from ~70% to 80% (customers active in prior 12	Order records	Quarterly (rolling)	Owner

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Objective	Performance standard	Data source	Frequency	Responsible
	months who reorder)			
3.3 Events	3 events attended; 1 new relationship per event progressing to capability conversation	Event attendance log, follow-up records	Per event	Owner

Every standard above is drawn from Section IV. None are aspirational targets added after the fact. If a standard cannot be measured with data you already collect or will collect under the Section VI actions, it does not belong here.

Performance by marketing-mix category

Product performance. Four case studies published by July 2026. Service tier defined and named. Prequalification pack submitted. If any of these are incomplete by deadline, the downstream activities (LinkedIn content, buyer presentations, website messaging) lose their raw material. Treat these as hard prerequisites, not flexible targets.

Pricing performance. Recovery premium applied to at least 2 quotes by July 2026, with win/loss tracked separately. If the premium quotes lose at a rate more than 20 percentage points below your standard win rate after 3 months, review the premium level before continuing.

Promotion performance. LinkedIn: 4 posts per month minimum. Engagement rate tracked monthly; sustained decline over two months triggers a content mix review. Events: 3 attended by May 2027, each producing at least 1 follow-up conversation within 30 days.

Financial projections framework

The indicative marketing budget from Section VI is £18,000-£28,000 for the first 12 months, with headroom for a fractional marketing hire (£8,000-£15,000 additional). The return framework is straightforward for a subcontractor business:

Break-even on the marketing investment. Two signed maintenance packages at £50,000+ each (Objective 1.1) would generate £100,000+ in contract value against a total marketing spend of £26,000-£43,000. At typical subcontractor margins of 8-15%, the gross profit from those two contracts alone (£8,000-£15,000) does not fully cover the marketing investment in year one. The payoff is structural: recurring maintenance contracts compound over 3-5 years. A single £50,000 annual maintenance contract retained for three years is worth £150,000 in revenue before any upselling.

Revenue impact estimation. Track the source of every new contract from Month 1. Tag each as: existing relationship (would have happened without the plan), marketing-influenced (contact originated from LinkedIn, website, event, or prequalification submission), or outbound (direct approach by Owner). By Month 9, you should have enough data to estimate the marketing-influenced share of new revenue. If that share is below 10% of new contract value, the marketing activities are not converting and the channel mix needs review.

Cost monitoring. External content production is the largest controllable cost (£9,000-£13,500). Review the content supplier's output against the case study and LinkedIn cadence targets at Month 4 before committing to the full-year engagement.

Review schedule

Monthly (Owner, 30 minutes). Quotes issued and conversion rate. LinkedIn posts published and engagement. Inbound enquiries received and response times. Any customer feedback logged in the tracking system. This is a dashboard check, not a strategy session.

Quarterly (Owner + Finance, 60 minutes). Revenue concentration percentage. Retention rate (rolling). Progress against objectives 1.1, 1.2, 1.3. Quarterly account reviews completed. Budget spent vs planned. Decide whether to continue, adjust, or stop any activity that is not producing results.

Annual (Owner + Operations Director, half day). Full review of whether the direction from Section III remains correct. Has the maintenance and remediation market grown as expected? Has the competitive set changed? Are the goals still the right goals? This is the trigger point for commissioning an updated plan or adjusting the strategy.

What triggers a change

Not every deviation from target requires action. The triggers below identify the point at which a deviation is large enough to warrant review rather than patience.

Trigger condition	Response
Quote conversion below 25% for two consecutive months	Review pricing or qualification criteria. Are you quoting the right work to the right buyers?
Zero inbound enquiries after Dec 2026	Review website content and LinkedIn effectiveness. Consider whether the channel mix is wrong or the content is not reaching the right audience.
LinkedIn engagement rate declining for two consecutive months	Change content mix. Shift from operational content to case study outcomes or client challenges.
Revenue concentration above 40% at any quarterly review	Accelerate new buyer pursuit. Bring forward Objective 1.1 presentations or expand event attendance.
Retention below 70% at any quarterly review	Trigger immediate account recovery review. Contact every inactive account within 2 weeks.
Case study pipeline below 2 documentable projects	Brief project managers on documentation requirements. The evidence base needs continuous feeding.
Marketing budget exceeding plan by more than 20%	Review external supplier costs and event expenditure before committing to next quarter.
Recovery premium win rate more than 20pp below standard	Adjust the premium level or narrow the scope of work it applies to.

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Keeping the strategy current

A marketing plan for a business in a declining market segment has a shorter shelf life than one written for a stable market. Three conditions should trigger a full strategy review before the 12-month cycle completes: a major competitor exits or enters your corridors, a principal contractor restructures its supply chain in a way that changes your framework position, or the FTTH new-build decline accelerates materially beyond the estimated 25-30% range identified in Section II-C. Any of these changes the competitive assumptions the plan is built on.

Between formal reviews, the quarterly check-in covers whether the market is behaving as expected. If it is not, the response is not to rewrite the plan but to adjust the emphasis: accelerate the activities that are working, pause the ones that are not, and redirect budget accordingly. The ten-question change filter from Section VI applies before any new activity is added.

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Defined-Terms Register

Term	Definition	Home section
Adjacent infrastructure	Battery-storage and solar civils, water-utility minor civils and data centre campus connectivity outside telecoms civils (EV charging civils on watch list per Appendix)	II-C, V-A
Build manager	The buyer-side individual who identifies subcontractor needs and shortlists candidates	II-B
Common Assessment Standard	Industry prequalification standard required for public-sector-adjacent contracts since February 2025	II-B
Contribution pricing	Pricing above variable costs to generate positive contribution when capacity is idle	V-D
Core offer	The named proposition combining full-route delivery, published performance metrics and a recovery premium	III, V-G
Cost-plus pricing	Pricing method where a margin percentage is added to input costs	II-A, V-D
Delivery confidence	The buyer's assessment of whether a subcontractor will complete work on programme, replacing lowest price as the primary selection driver	II-B
Evidence gap	The difference between what the business can deliver and what buyers can verify before procurement	II-A, III
Fractional marketing manager	A part-time external marketing resource engaged 1-2 days per week	VI
FTTH	Fibre to the home; the infrastructure connecting fibre-optic cable from the exchange to individual premises	II-A

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Term	Definition	Home section
Multi-trade crew	A team qualified across civils, splicing, blown fibre, overhead cabling, testing and reinstatement	II-A, III
NRSWA	New Roads and Street Works Act; the accreditation required for anyone working on public highways	II-A
PIA	Physical Infrastructure Access; Britlink Networks' framework allowing operators to use existing ducts and poles	II-C, V-C
Prequalification	The pass/fail documentation gate buyers apply before commercial evaluation	II-B
Principal contractor	A Tier 1 firm that holds operator frameworks and subcontracts packages to firms like yours	II-B, V-A
Programme-driven retention	Customer retention determined by whether the operator's build programme continues, not by loyalty	II-B
Recovery premium	A 15-25% price uplift on difficult-route and recovery work, attached to a defined service specification	V-D
Route recovery	Completing stalled, failed or difficult infrastructure routes that other subcontractors cannot finish	III, V-G

Terms are defined as used in this plan and may carry different meanings in other contexts.

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Adjacent Market Opportunity Assessment

1. Context Summary

Twenty-six per cent year-on-year. That is the rate at which your core market, FTTH network build, is shrinking in build volumes. When the main report landed on the finding that your revenue base depends heavily on a small number of principal contractor clients in a contracting market, the question stopped being whether to look beyond telecoms civils and became which adjacent markets deserve your attention first.

Your business operates as a telecoms infrastructure construction contractor across the Midlands, South East and East of England. You build fibre-to-the-home networks: civils, ducting, fibre installation, splicing, testing, reinstatement. The market maturity assessment places your core market in decline phase, with residential FTTH build rates falling from roughly 26,000 premises per month across the top ten operators in 2024 to 19,300 in 2025. Concentration risk compounds the problem: fewer principal contractors are commissioning fewer metres of duct, and each lost contract hits harder when the pool is already shallow.

The strategic rationale for adjacent market exploration rests on three imperatives. First, reduce revenue concentration by broadening the client base beyond telecoms principal contractors. Second, build counter-cyclical revenue streams that do not move in lockstep with residential broadband rollout. Third, apply the transferable civils and fibre skills your workforce already holds to sectors where demand is growing and labour is scarce. This appendix works through that logic systematically: what you can transfer, where you could take it, what it would cost, and what I recommend you do first.

2. Transferable Capability Profile

Before identifying target markets, I audited your business against six capability categories to establish exactly what you can carry into a new sector and where the gaps sit. The summary below draws on the intake data, your operational structure, and the market research conducted for this assessment.

Workforce. Your crews hold NRSWA accreditation and CSCS cards across multiple trades covering the full chain from civils through to fibre testing. That combination is uncommon. Most competitors subcontract between trades; you do not. Your operatives can excavate, install ducts and chambers, pull and blow fibre, splice, test, and reinstate, all within a single crew deployment. You also hold HDD and trenchless crossing capability, which is a differentiator in any sector where routes cross roads, railways, or watercourses. Traffic management capability is held in-house. Rapid mobilisation, getting crews on site quickly against changing programme demands, is a function of your flat supervisory structure rather than a lucky byproduct.

Infrastructure. You maintain regional depot infrastructure across the Midlands, South East and East of England. Mini-excavators, HDD rigs, cable-laying equipment, and reinstatement plant are in the fleet. This geographic spread and plant base mean you can credibly serve projects across three English regions without establishing new premises.

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Systems. Your flat supervisory structure is a genuine operational advantage. Decisions travel fewer layers, which shows up as faster mobilisation and lower overhead per metre of duct. The multi-trade crew model eliminates the coordination cost and programme risk of subcontracting between trades.

Relationships. Your existing client base sits in telecoms principal contracting. There is some overlap with EV charging infrastructure buyers, and you have prior experience delivering business park ducting, which opens a door into private fibre and campus connectivity markets. These are footholds, not established positions, but they matter as reference points when approaching new sectors.

Reputation. You are established in telecoms civils with a positioning as a route recovery and difficult-route specialist. That reputation has value: it signals to buyers in adjacent markets that your crews can handle complex civil engineering conditions, not just straightforward greenfield trenching.

Management. Lean overhead structure with a direct labour model. You are not carrying the fixed cost base of a large corporate, which means you can enter a new market at modest investment levels without needing to win large volumes immediately to cover overhead.

The overall picture is a business whose workforce skills and operational model transfer well to several adjacent sectors. The gaps, where they exist, are in accreditations, specific technical training, and buyer relationships rather than in fundamental capability.

3. Candidate Market Long List

Eight candidate industries emerged from the initial capability-matching exercise, alongside a set of industries excluded at the outset because they fall outside your operating parameters or represent a fundamental capability mismatch.

Each candidate was screened against three hard filters:

1. **Segment markets, not resources.** The opportunity must be defined by a distinct buyer group and procurement route, not simply by redeploying the same people to similar-looking work.
2. **Managed presence possible.** You must be able to enter and maintain a presence at your current scale without needing to acquire another business or fundamentally restructure.
3. **Anti-correlation with current market.** The demand drivers should differ from residential FTTH rollout, so the new revenue stream provides genuine diversification rather than amplifying existing concentration.

#	Candidate Industry	Filter 1	Filter 2	Filter 3	Result
1	EV Charging Network Civils	PASS	PASS	PASS	Through
2	Data Centre Campus Connectivity	PASS	PASS	PASS	Through
3	Water Utilities AMP8 Civils	PASS	PASS	PASS	Through
4	BESS and Solar Farm Civils	PASS	PASS	PASS	Through

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#	Candidate Industry	Filter 1	Filter 2	Filter 3	Result
5	Private Fibre Networks	PASS	PASS	PARTIAL	Through (noted)
6	Renewable Energy Grid Connection Civils	Merged into BESS/Solar	-	-	Merged
7	5G Small Cell Infrastructure	PASS	FAIL	PASS	Screened out
8	Highways Technology Infrastructure	PASS	FAIL	PASS	Screened out

5G Small Cell Infrastructure failed filter 2. The civils scope per installation is too small for a standalone managed market entry. Each cell site involves a single duct route; the volume needed to build a meaningful revenue line would require winning work at a scale that only makes sense as an add-on to existing telecoms deployment, not as a new market position.

Highways Technology Infrastructure failed filter 2. National Highways works are procured through multi-year alliances and large framework contracts. At your current scale, direct framework appointment is unrealistic, and the civils scope per project is often small relative to the procurement effort. Entry would realistically require an acquisition.

Renewable Energy Grid Connection Civils was merged into BESS and Solar Farm Civils because the civils scope (ducting, excavation, reinstatement for cable routes) overlaps substantially, and the buyer set intersects with EPC contractors already active in BESS and solar.

Private Fibre Networks passed filters 1 and 2 but scored only PARTIAL on filter 3. Demand for private and enterprise fibre is growing, but the underlying drivers (fibre operator capital expenditure, broadband infrastructure investment) correlate with the same telecoms investment cycle that governs your existing FTTH work. It remains a viable diversification path, but it provides less counter-cyclical protection than the other candidates.

Excluded industries: Heavy civil engineering, high-risk rail, domestic installations, and design-and-build were excluded as client-nominated exclusions. Offshore wind and gas distribution were excluded on capability mismatch.

You confirmed the top five candidates for detailed attractiveness screening: Private Fibre Networks, Data Centre Campus Connectivity, EV Charging Network Civils, BESS and Solar Farm Civils, and Water Utilities AMP8 Civils.

4. Prioritised Shortlist

Each of the five candidates that passed the long-list screen was assessed on market size and growth, margin profile, capability transfer level, demand correlation, and entry barriers. The ranking below reflects the overall attractiveness to your business, not simply the largest market or the easiest entry.

Rank 1: Data Centre Campus Connectivity. The UK data centre construction market sits at approximately USD 2.25 billion (2026), growing at 16.9% annually toward USD 4.9 billion by 2031. The project pipeline is concrete: 94 confirmed projects worth over GBP 36 billion currently active or in construction (Barbour ABI / ACEnet), alongside a wider pipeline of 246 pre-tender projects tracked by Glenigan that includes the 94 active set plus earlier-stage schemes still at planning or feasibility stage. Together with over GBP 59 billion in announced investments since 2023, this is one of the most concrete capital pipelines in UK construction. The civils-addressable portion of new-build alone could sit in the range of GBP 6 billion to GBP 13 billion over the period to 2030. Margins for civils subcontractors in this sector currently run at an estimated 8% to 15% net, well above the compressed 4% to 7% typical of competitive FTTH work. Capability transfer is strong: the physical work of installing duct routes, fibre conduit, and cable containment on a campus is materially similar to FTTH network build. Demand drivers differ from residential broadband (AI compute, cloud migration, hyperscaler capital expenditure), providing genuine counter-cyclical value. The primary barrier is the absence of buyer relationships with hyperscalers and Tier 1 data centre contractors, but the subcontractor entry route is well-established, with firms like Cobalt-3 Infrastructure having made exactly this transition from telecoms civils.

Rank 2: BESS and Solar Farm Civils. Operational grid-scale battery storage capacity grew 45% in 2025, and the government's targets imply a further five-to-sixfold BESS build-out by 2030. Solar deployment is forecast at 5 to 5.5 GWp in 2026, with ground-mount installations alone expected to touch 4 GWp for the first time. Each large solar farm requires 200 to 400 km of cable trenching. The civils scope transfers directly from telecoms: excavation, trenching, duct installation, reinstatement. Entry barriers are lower than data centres; no sector-specific accreditation is required for basic civils work beyond standard construction cards, though high-voltage cable work requires additional training. Margins are estimated at 4% to 8% on measured works, with higher rates achievable where mobilisation speed commands a premium. The labour shortage is acute: a single 100 MW solar farm can require 150 to 200 groundworkers at peak, and the sector openly acknowledges it lacks the workforce to meet deployment targets. Demand is policy-backed and largely independent of the telecoms investment cycle.

Rank 3: Water Utilities AMP8 Civils. The largest funded infrastructure programme in the assessment: GBP 104 billion in approved investment for 2025 to 2030, a 71% increase on the prior period. Five-year programme visibility is a material advantage over telecoms, where build programmes are subject to altnet commercial decisions. The physical skills overlap is direct: trenching, duct laying, reinstatement, traffic management, confined-space working. Margins are tighter (estimated 2% to 5% for a Tier 2 or minor civils entrant) but volume is substantial and the spending peak is expected in 2027 to 2029. The entry barrier is primarily accreditation: water-industry-specific cards and registrations that your workforce does not currently hold. Coastal Counties Water's GBP 72 million minor civils framework is a close scope match for your existing capabilities.

Rank 4: Private Fibre Networks. The closest adjacency to your current work. All required accreditations and skills are already held. The UK dark fibre market is valued at approximately USD 360 million (2025), growing at 13% annually. Margins are estimated at 8% to 15%. Your prior business park ducting experience provides an immediate reference point. The limiting factor is demand correlation: private fibre growth is driven by many of the same investment cycles as your existing FTTH market. It diversifies your client base but provides less protection against a broader telecoms infrastructure downturn.

Rank 5: EV Charging Network Civils. A growing market (UK chargepoint equipment value growing at approximately 13% per year, with the public chargepoint count itself growing by approximately 20% in 2025; government target of 300,000 public chargepoints by 2030) with civils scope that

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maps closely to your existing skills. The Midlands LEVI programme alone has secured GBP 40.8 million for 16,000 chargers. However, you have already lost a quote in this space because the buyer wanted an established electrical partner, and grid connection delays create programme uncertainty that sits outside the civils contractor's control. Margins are estimated at 6% to 10% but are exposed to erosion from DNO-driven programme delays. The market is viable, but the combination of the electrical partnership gap and programme uncertainty places it below the top three.

The top three, Data Centre Campus Connectivity, BESS and Solar Farm Civils, and Water Utilities AMP8 Civils, were selected for full entry assessment.

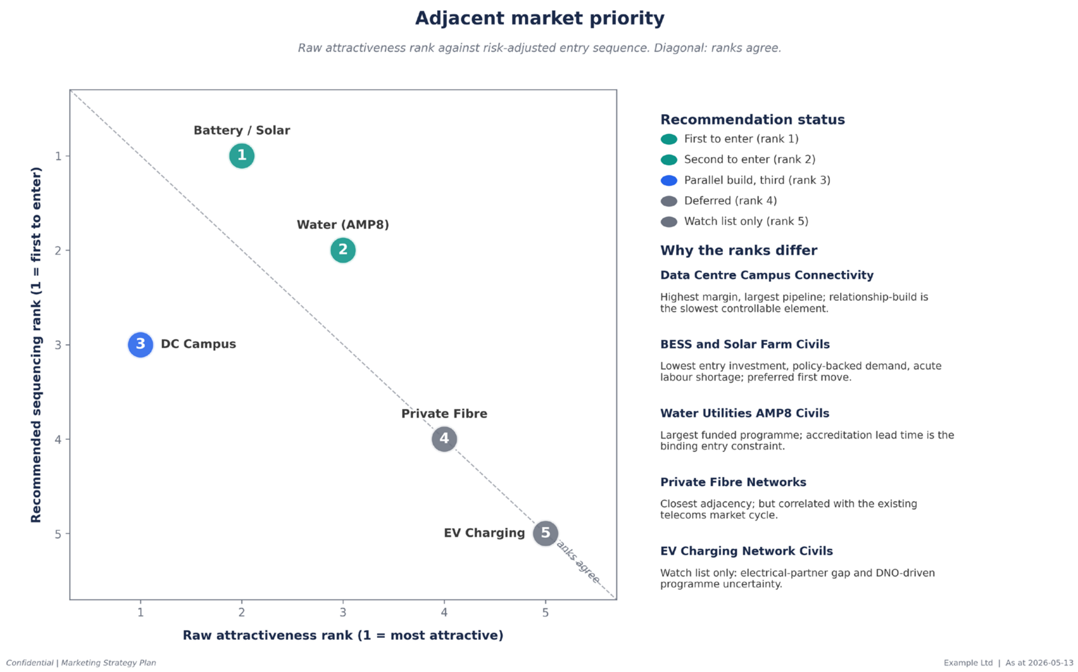

Figure 7: The same five candidates plotted on raw attractiveness (horizontal) and the risk-adjusted entry sequence (vertical). Points on the diagonal are where the two views agree; off-diagonal points are where Section 6 reorders the candidates against Section 4 on entry-risk grounds.

5. Entry Assessment

5.1 Data Centre Campus Connectivity

Twelve to eighteen months stands between a decision to enter this market and the first invoiced revenue. That timeline reflects the fact that while your civils skills transfer almost completely, the accreditation and relationship gaps are real.

Accreditation gaps. Data centre Tier 1 contractors and hyperscaler procurement teams expect an integrated management system covering ISO 9001 (quality), ISO 14001 (environmental), and ISO 45001 (health and safety). For a small contractor, initial certification across all three costs approximately GBP 7,000 to GBP 15,000 as an integrated system, with annual surveillance audits running GBP 3,000 to GBP 5,000. The process takes 6 to 9 months from gap analysis to certificate. Membership of an SSIP-recognised pre-qualification scheme (Achilles BuildingConfidence, CHAS, or Constructionline) is required for virtually all Tier 1 supply chains, at a cost of GBP 500 to GBP 2,000 per year. Where campus connectivity scopes extend into structured cabling beyond duct-only civils, operatives would need ECS Network Infrastructure Installer cards at Level 3, requiring NVQ qualifications over 12 to 18 months.

Skills gaps. The physical work transfers directly. The gaps sit in data centre-specific QA documentation, MEP coordination awareness, and the programme discipline of mission-critical construction where civils delays directly affect fit-out milestones. Retraining 4 to 6 supervisors through a programme such as the CNet Certified Data Centre Technician Professional, a five-day course leading to a Level 4 award, would cost an estimated GBP 15,000 to GBP 25,000 including lost production time.

Equipment gaps. Your existing telecoms plant is directly applicable. The gap is one of scale: campus projects may require a larger HDD rig for longer crossings and higher-capacity vacuum excavation plant for work near existing high-voltage infrastructure. Capital provision of GBP 50,000 to GBP 100,000 would cover this, either through purchase or long-term hire.

Relationship gap. This is the most significant barrier. You have no existing relationships with hyperscalers, colocation operators, or Tier 1 data centre contractors. Data centre procurement operates through framework agreements with design-build contracts typically locked in 24 months before groundbreaking. The realistic entry route is as a second-tier civils subcontractor to a Tier 1 already operating in the data centre space, building references over 2 to 3 completed projects before being considered for direct framework positions. Cobalt-3 Infrastructure and Kenneck Telecoms Civils both followed this path from telecoms civils origins.

Total entry investment: GBP 95,000 to GBP 185,000. **Timeline to first revenue:** 12 to 18 months.

Key risk: The relationship-building phase is the longest and least controllable element. The investment in accreditation and training is wasted if you cannot secure an initial subcontract opportunity within the first 18 months.

5.2 BESS and Solar Farm Civils

Nine to eighteen months to first revenue, with the lower end achievable if you pursue civils-only scope and defer the higher-voltage electrical work.

Accreditation gaps. The primary gap is the National Electricity Registration Scheme (NERS), required for contestable electrical connection works at the voltage levels standard on solar and BESS sites. Full ICP status covering scopes up to 132 kV costs GBP 15,000 to GBP 20,000, with an elapsed time of 6 to 12 months from application to certificate. ISO 14001 certification, if not already held, adds GBP 5,000 to GBP 10,000 and 3 to 6 months. Constructionline Gold registration is expected by most EPC contractors and adds GBP 500 to GBP 2,000.

Skills gaps. Your core civils skills transfer directly: trenching, duct installation, cable pulling, earthmoving, and reinstatement are the same work in a different setting. The gap is in high-voltage electrical work. Solar farms require cable trenching and jointing at 11 kV and 33 kV, which telecoms operatives are not trained or authorised to perform. EUSR SHEA Power qualification (one day, approximately GBP 145 per person) and high-voltage authorised person training (3 to 5 days, GBP 1,600 to GBP 2,200 per person) are required. For a team of 10 operatives, HV training costs run approximately GBP 20,000 to GBP 25,000 in course fees. Specialist cable jointers would need to be recruited rather than retrained, as jointing competence requires supervised site experience beyond classroom training.

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Equipment gaps. Your existing plant covers the cable trenching element. BESS sites additionally require heavier plant (8 to 14 tonne excavators) for concrete pad formation and compacted aggregate platforms. Incremental equipment investment is estimated at GBP 30,000 to GBP 80,000, depending on what is already in the fleet. A hire-first approach could reduce upfront outlay substantially.

Relationship gap. You would be starting without established EPC contractor relationships. Major EPCs in this space (Boreal EPC, Equanix Energy, Beacon Power Solutions, Anvil Energy Services) maintain approved vendor lists requiring completed project references. Building a credible track record typically means accepting a first project at reduced margins. Several civils firms have successfully crossed from utilities and telecoms into renewables, including Earthline Utilities and Albright Construction Group, following this same path.

Total entry investment: GBP 50,000 to GBP 120,000. **Timeline to first revenue:** 9 to 18 months.

Key risk: Extended payment cycles on EPC subcontracts (60 to 90 days is common) require working capital headroom. The first project will likely run at reduced margins to build the reference base.

5.3 Water Utilities AMP8 Civils

The largest funded programme in this assessment, and the one with the clearest five-year spending visibility. Entry investment is also the highest.

Accreditation gaps. Three water-specific accreditations are required. The EUSR National Water Hygiene card (the "Blue Card") is a half-day course at approximately GBP 30 per person, mandatory for anyone entering clean water sites. EUSR SHEA Water registration is a one-day course at approximately GBP 185 per person, required for access to operational water company sites. WIRS accreditation, required for contractor organisations undertaking new connections or network development work, involves a management system review and site assessment by Lloyd's Register, with total costs estimated at GBP 8,000 to GBP 15,000 and a timeline of 3 to 6 months. From July 2026, EUSR is separating SHEA registrations from CSCS cards, meaning your operatives will need to manage two card types.

Skills gaps. Your workforce holds directly transferable skills in trenching, duct laying, reinstatement, traffic management, and confined-space working. The additional skills required are water-specific: working on pressurised water mains, water hygiene awareness, contamination prevention protocols, and familiarity with water company specifications for pipe materials and jointing methods. The water industry is reporting 35% of skilled roles unfilled, with an estimated 63,000 vacancies needing to be filled by 2027, and career-changers from infrastructure sectors are explicitly identified as a target population. Retraining 20 operatives to basic water civils competence would cost approximately GBP 30,000 to GBP 50,000 including course fees, assessment, and lost productive time, deliverable within 8 to 12 weeks.

Equipment gaps. Much of your existing plant is applicable. The principal additions are dewatering pumps (GBP 100 to GBP 1,500 per week on hire) and vacuum excavation equipment for working near existing buried assets (hire at GBP 800 to GBP 1,200 per day, or purchase from approximately GBP 120,000). Pipe-specific tooling for water mains work adds further cost. A realistic first-year equipment budget is GBP 50,000 to GBP 100,000.

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Relationship gap. You have no existing water sector relationships. Most AMP8 frameworks were tendered between 2023 and 2025, meaning many are closed for this cycle. However, minor civils frameworks and subcontracting routes remain accessible. Coastal Counties Water's GBP 72 million minor civils framework was tendered in 2025 with appointments in early 2026, and the scope of works (paths, concrete bases, ducting, chamber construction, reinstatement, drainage) closely mirrors your existing capabilities. Northern Counties Water appointed 30 regional firms for over GBP 500 million of AMP8 minor works. The strongest precedent for a telecoms-to-water transition is Orchard Civils Group, which achieved it through acquisition of water-specialist businesses, though organic entry at minor civils level is also viable.

Regionally, the relevant buyers align with your footprint. Easternshire Water (East of England, GBP 2.6 billion AMP8 capital programme), Midshire Water (Midlands, GBP 14.9 billion AMP8 totex), and Coastal Counties Water (South East, GBP 3.7 billion capital delivery frameworks) all operate in your geography.

Total entry investment: GBP 130,000 to GBP 230,000. **Timeline to first revenue:** 9 to 14 months.

Key risk: Framework timing. Many AMP8 frameworks are already awarded, and the next major procurement window may not open until mid-cycle reviews in 2027 to 2028. Subcontracting to an appointed Tier 1 is the realistic near-term route. The spending peak (2027 to 2029) is favourable for an entry decision taken now.

6. Recommendations

Three markets justify active pursuit. They are not equal in attractiveness, and they should not receive equal investment. I have ranked them in the order I recommend you prioritise.

Recommendation 1: BESS and Solar Farm Civils. Enter first, invest GBP 50,000 to GBP 120,000, target first revenue within 9 to 18 months.

This is where the combination of lowest entry investment, strongest policy-backed demand, and most acute labour shortage gives you the best risk-adjusted entry point. Your civils skills transfer with minimal retraining for the earthworks and trenching scope, and you can defer the higher-voltage electrical work until you have a reference base. Start by pursuing civils-only subcontracts under EPC contractors on solar farm or BESS projects in the Midlands and East of England. Accept that the first project may run at reduced margins. The government's Clean Power 2030 targets and the consented pipeline of over 60 GW of BESS provide multi-year demand visibility. The principal risk is EPC payment terms; confirm your working capital position can absorb 60 to 90 day payment cycles before committing.

Entry mode: Tier 2 civils subcontractor to EPC contractors, progressing to direct developer engagement as the reference base builds.

Recommendation 2: Water Utilities AMP8 Civils. Begin accreditation now, invest GBP 130,000 to GBP 230,000, target first revenue within 9 to 14 months.

The largest funded programme in this assessment, with a defined five-year window and spending that is expected to steepen into 2027 to 2029. The investment is higher than BESS/Solar, but the programme visibility and counter-cyclical profile justify it. Begin WIRS accreditation and operative training immediately: the accreditation lead time is the binding constraint. Target minor civils

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frameworks and Tier 2 subcontracting in the South East (Coastal Counties Water) and Midlands (Midshire Water) as the entry route. The scope of Coastal Counties Water's minor civils framework is close to what you already deliver. The principal risk is framework timing: if current frameworks are fully awarded, you may need to enter as a subcontractor to an appointed Tier 1 until mid-cycle procurement opens. The skills shortage in the sector (35% of roles unfilled) works in your favour.

Entry mode: Minor civils framework bids and Tier 2 subcontracting to appointed Tier 1 contractors, prioritising Easternshire Water, Midshire Water, and Coastal Counties Water geographies.

Recommendation 3: Data Centre Campus Connectivity. Begin ISO certification and relationship building in parallel with the first two, invest GBP 95,000 to GBP 185,000, target first revenue within 12 to 18 months.

The highest-margin opportunity in this assessment (estimated 8% to 15% net) and the strongest long-term growth trajectory. The relationship gap is the reason it sits third rather than first: securing an initial subcontract with a Tier 1 data centre contractor takes longer and is less controllable than the other two entry paths. Start the ISO triple certification process immediately, as it takes 6 to 9 months and is a prerequisite for any data centre supply chain. In parallel, identify Tier 1 main contractors working on regional data centre projects in the Midlands and South East and begin introducing your business as a campus civils subcontractor. The pipeline is substantial (GBP 36 billion identified by Barbour ABI), and the labour shortage is pulling buyers toward firms with transferable skills. The principal risk is that investment in accreditation and training delivers no return if you cannot break into the supply chain within 18 months.

Entry mode: Second-tier civils subcontractor to Tier 1 data centre main contractors, targeting regional projects outside the contested London market.

Combined entry investment across all three markets: GBP 275,000 to GBP 535,000, with scope to phase the spend over 12 to 18 months and to share some costs (ISO certification, for example, serves both the data centre and BESS/Solar markets). Not all three need to succeed. If two of the three generate revenue within the projected timelines, the diversification objective is substantially met.

What I would not pursue in the near term: Private Fibre Networks (too correlated with your existing market decline to provide meaningful diversification) and EV Charging Network Civils (the electrical partnership gap and grid connection uncertainty make entry less attractive until those obstacles are resolved). Neither is a bad market; they are simply lower priority given the alternatives available.

7. Sources

Sources are drawn from the AM-1, AM-2, and AM-3 research conducted for this engagement, verified by independent quality gate checks on 12 May 2026. Key sources are listed below, grouped by market.

General and Cross-Market

Source	Publisher	Date
UK civils and infrastructure growth forecast (17% civils growth 2026)	New Civil Engineer / Glenigan	Jun 2025

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Source	Publisher	Date
UK civil engineering labour shortage (47,000-48,000 new workers needed annually)	Construction News / Civil Edge	Feb 2026
Average UK contractor margins (Top 100 at 1.7% pre-tax, 2024)	The Construction Index	2025

Data Centre Campus Connectivity

Source	Publisher	Date
UK data centre construction market size (USD 2.25bn, 16.9% CAGR)	Mordor Intelligence	2026
UK data centre pipeline (94 projects, GBP 36.4bn)	Barbour ABI / ACEnet	2026
UK data centre pipeline (246 pre-tender projects)	Data Centre Review / Glenigan	Mar 2026
GBP 59bn announced investments, 50 data centres within five years	Oxford Economics	2025
Data centre commissioning growth (42% more capacity in 2026)	RLB Europe	2026
Construction cost per MW, cost breakdown, inflation forecast	Turner and Townsend	2025
Contractor concentration risk in data centre builds	Capacity Media	2026
Procurement models for data centre construction	Gowling WLG / Mondaq	2025
Cobalt-3 Infrastructure telecoms-to-data-centre transition	Cobalt-3 Infrastructure corporate website	2026
Kenneck Telecoms Civils telecoms civils and data centre positioning	Kenneck Telecoms Civils corporate website	2026
ISO certification cost estimates (GBP 7k-15k integrated)	Reliable Cert UK	2025
CNet CDCTP supervisor training programme	CNet Training	2025
Data centre skills shortage (9,862 vacancies, 50% retirement by	Data Centre Review	Apr 2026

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Source	Publisher	Date
2030)		

BESS and Solar Farm Civils

Source	Publisher	Date
UK BESS capacity growth (45% in 2025, 12.9 GWh total)	Energy-Storage.News	Jan 2026
BESS pipeline (6.5 GW under construction, 60 GW consented)	RenewableUK EnergyPulse	Dec 2025
UK solar forecast (5-5.5 GWp in 2026, 50% YoY growth)	Solar Power Portal	Jan 2026
Q1 2026 solar deployment (800 MWp, 14% YoY increase)	Solar Power Portal	Apr 2026
Solar farm civils scope (200-400 km trenching per project)	Rospower / Albright Construction Group	Feb 2026
BESS EPC contractor landscape	Modo Energy	Dec 2025
Planning approvals doubled in 2025 (45 GW approved)	ConstructionArea.co.uk	Dec 2025
Labour shortage (150-200 groundworkers per 100 MW solar farm)	UKR Group / Rospower	Jan 2026
NERS accreditation (GBP 5k-20k, 6-12 months)	LRQA / HSEQ-360	2026
HV authorised person training costs (GBP 1,600-2,200 per person)	The Faraday Centre / PPL Training	2025
Earthline Utilities telecoms-to-renewables transition	Earthline Utilities corporate website	2025
Albright Construction Group BESS market entry	Albright Construction Group	Apr 2026

Water Utilities AMP8 Civils

Source	Publisher	Date
Ofwat AMP8 final determinations (GBP 104bn totex, 71% increase)	New Civil Engineer	Dec 2024
AMP8 mobilisation slower than anticipated	New Civil Engineer	Apr 2026

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Source	Publisher	Date
Midshire Water AMP8 year-one investment (GBP 1.7-1.9bn)	Water Briefing	Nov 2025
Coastal Counties Water AMP8 capital delivery frameworks	New Civil Engineer	Aug 2024
Coastal Counties Water minor civils framework (GBP 72m)	Water Briefing	Mar 2026
Easternshire Water GBP 1.5bn Major Projects Framework	New Civil Engineer	Feb 2026
Northern Counties Water 30 regional firms for GBP 500m+ AMP8 works	New Civil Engineer	Dec 2024
EUSR Blue Card and SHEA Water training costs	Envicourse / Evolution Safety Solutions	2025
WIRS accreditation process and timeline	LRQA	2025
Water industry skills shortage (35% roles unfilled, 63,000 vacancies)	Skills Alliance	2026
Orchard Civils Group telecoms-to-water transition	Orchard Civils Group corporate reporting	2025
Renaissance Infrastructure plc AMP8 framework positions (10 of 12 water companies)	Construction News	Feb 2026

EV Charging Network Civils

Source	Publisher	Date
UK EV charging equipment market value (USD 460m, 13% CAGR by value)	Mordor Intelligence	2025
UK public chargepoint count (~20% growth in 2025; 118,321 installed Jan 2026)	GOV.UK (DfT)	Jan 2026
Public chargepoint statistics (118,321 installed, Jan 2026)	GOV.UK (DfT)	Jan 2026
NAO public chargepoints review (300,000 target, grid bottlenecks)	National Audit Office	Dec 2024
LEVI programme (GBP 381m	GOV.UK (DfT)	2025

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Source	Publisher	Date
allocated)		
Midlands LEVI funding (GBP 40.8m, 16,000 chargers)	Midlands Connect	2025
ZEV mandate annual targets (33% in 2026, 80% by 2030)	EVA England	2025

Private Fibre Networks

Source	Publisher	Date
UK dark fibre market (USD 360m in 2025, 13% CAGR to USD 970m)	Transpire Insight	2025
82% of UK DC operators delayed by fibre availability	Neos Networks / Censuswide	Oct 2025
Ofcom Telecoms Access Review 2026-2031	Ofcom	Mar 2026
FTTH build rate decline (26,000 to 19,300 premises/month)	Intelligens Consulting	2025
Crossover Fibre Ltd / Halewood Business Park private-fibre contract	ISPreview UK	Sep 2025

End of Adjacent Market Opportunity Assessment.

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