



## **Turks and Caicos Islands Telecommunications Commission**

**Public Notice 2025-13  
July 11, 2025**

### **Public Consultation on Satellite-Based Internet Services Summary of Stakeholder and Public Engagement & Next Steps**

#### **1. Introduction**

The Turks and Caicos Islands Telecommunications Commission (the Commission) has opened a public consultation to consider licensing satellite-based internet services—such as SpaceX’s Starlink—in response to mounting demand for faster, more reliable connectivity. Many of the outer "family" islands depend on microwave backhaul, a technology that increasingly creates capacity bottlenecks and service interruptions, prompting residents to seek alternatives like satellite broadband.

In March 2025, Starlink submitted an application to secure a license to provide satellite internet services in TCI. However, the company later withdrew its application to allow the Commission to undertake a comprehensive consultation process to thoroughly explore regulatory implications for establishing a new licensing regime for satellite services.

The consultation attracted strong engagement, including detailed submissions from six key industry stakeholders. Concurrently, the Commission also conducted a public survey to assess the market’s appetite for satellite services. As such, this document summarizes the

inputs received during the consultation process as well as the results from the public survey. The information gathered will serve as the basis for the Commission’s final decision which will be published at a later date.

## 2. Objectives of the Consultation

- Assess the regulatory requirements for satellite-based internet services.
- Evaluate stakeholder and public feedback on licensing structure, Fees, ownership rules, interference, and service impact.
- Identify appropriate mechanisms for service affordability, reliability, and competition.

### 2.1 Consultation Questions

The Commission posed 7 questions seeking input on:

1. Creating a new license type
2. Fee structure
3. Jurisdictional limitations
4. Islander ownership requirements
5. Licensing of VSAT terminals
6. Interference risks
7. Market impact on existing providers

## 3. Consultation Process Overview

Milestone	Date	Outcome
Issuance of PN 2025-2	March 27, 2025	Launch of consultation process
Initial Comments Due	April 25, 2025	Receipt of written responses from five (5) industry stakeholders: Digicel, Flow (Cable & Wireless), GSOA, Starlink and Viasat
Reply Comments Due	May 30, 2025	Receipt of written responses from six (6) industry stakeholders: Digicel, Flow, GSOA, Starlink and Kuiper (Amazon)
National Survey on Satellite Services	April–May 2025	A <b>public survey</b> was conducted in parallel with 988 responses collected from residents and businesses.

## 4. Consultation Questions & Stakeholders Summarized Responses

The following entities formally submitted responses to the PN 2025-2 Consultation on Licensing of Satellite-Based Internet Service Providers:

- **Digicel (TCI) Ltd;** Incumbent mobile and broadband telecommunications operator in the Turks and Caicos Islands.
- **Cable & Wireless (TCI) Ltd (Flow):** Pan-Caribbean telecommunications operator and direct competitor to Digicel.
- **GSOA:** Global Satellite Operators Association; International industry association representing the satellite communications sector.
- **Starlink:** a satellite internet service operated by SpaceX
- **Viasat Inc:** a U.S.-based global communication company  
Summary of Stakeholder Responses

### 4.1 Licensing Structure

**Question 1: Should the Commission introduce a new licence type to facilitate the specific licensing of satellite-based internet services?**

- **Starlink:** Strongly supports a new license category tailored for satellite ISPs to reduce complexity and align with global norms.
- **Viasat:** Supports differentiated licensing, especially for satellite operators providing direct-to-consumer services. One-size-fits-all licenses aren't suitable.
- **Digicel:** Opposes. Argues that a new category undermines regulatory neutrality and introduces unfair competitive advantages.
- **Flow (Cable & Wireless):** Opposes new satellite-specific license category, for concerns of anticompetitive behavior. Advocates for technology-neutral licensing under existing Internet Network or Services categories.
- **GSOA:** Supports a flexible framework and simplified licensing, including blanket authorizations for VSAT and no mandatory local presence for wholesale satellite capacity providers.

## 4.2 Fees and Economic Contribution

**Question 2: What approach should the Commission take to establish the licence fees for satellite-based internet services?**

- **Starlink:** Advocates for drastically reduced fees (2% of annual net revenue vs. 7% of gross), citing affordability and regional examples like El Salvador.
- **Viasat:** No detailed fee proposal but supports tailored fees for each satellite service type (direct-to-consumer vs. capacity resale).
- **Digicel:** Favors using the existing INS (Internet Network or Services) fee structure to ensure parity and avoid regulatory arbitrage.
- **Flow:** Recommends fees aligned with the existing INS structure to uphold fairness and competitive balance.
- **GSOA:** Implies support for a proportionate and enabling fee framework, consistent with global best practices.

## 4.3 Local Presence

**Question 3: In what way should the Commission approach the issues associated with the fact that the provision of some parts of a satellite service occur outside its jurisdiction?**

- **Starlink:** Suggests a simple licensing model recognizing the global nature of satellite services, with local resellers handling retail compliance.
- **Viasat:** Differentiates between operators directly serving TCI and those merely supplying capacity; only direct providers should require local licenses.
- **Digicel:** Demands robust local regulation regardless of service origin. Calls for mandatory local representation and reporting.
- **Flow:** Acknowledges jurisdictional complexity and supports “best effort” licensing conditions; asks that these be applied to all providers equally.
- **GSOA:** Emphasizes that wholesale satellite operators should not be subject to retail service licensing and supports using local resellers.

#### 4.4 Islander Control

**Question 4: How should the Commission proceed with the requirements for Islander Control for satellite internet services?**

- **Starlink & GSOA:** Suggest flexible ownership rules, favoring minimal restrictions.
- **Digicel:** Strongly supports retaining Islander Control or requiring tangible local benefits for exemptions (e.g., infrastructure, employment).
- **Flow:** Accepts current legislative requirements as sufficient.
- **Viasat:** No specific position, but implies licensing should reflect service type and local impact.

#### 4.5 VSAT Licensing

**Question 5: What approach should the Commission take to the licensing of VSAT terminals?**

- **Starlink & GSOA:** Support blanket/automatic licensing for VSATs to reduce red tape.
- **Viasat:** Recommends imposing conditions based on spectrum coordination, not end-user licensing.
- **Digicel:** Insists on individual licensing per terminal to maintain oversight and manage interference risks.
- **Flow:** Accepts blanket licensing for personal/residential use; insists providers pay spectrum fees.

#### 4.6 Interference and Spectrum Management

**Question 6: Do you have any comments on the Commission's assessment of the potential interference between satellite terminals and other services?**

- **Starlink:** Claims advanced spectrum-sharing technology enables coexistence with terrestrial services.

- **Viasat:** Urges enforcement of ITU rules (e.g., EPFD limits) to prevent interference; advocates for safeguards at the market access stage.
- **Digicel:** Warns against unregulated VSAT use; supports site-specific licensing and active interference monitoring.
- **Flow:** Agrees with the Commission’s concerns; urges operators to demonstrate mitigation capabilities before licensing.
- **GSOA:** Recommends harmonizing with ITU Resolutions (e.g., WRC-23) and supports shared use of spectrum with protections.

#### 4.7 Market Impact

***Question 7: What are your views on the extent to which the introduction of satellite-based services will impact the businesses of existing suppliers and affect consumers?***

- **Starlink:** Argues satellite will complement, not replace, terrestrial providers. Highlights benefits to underserved regions and disaster resilience.
- **Viasat:** Recognizes competition impact but sees a complementary role; emphasizes service to niche markets like maritime/aviation.
- **Digicel:** Warns of harmful competition from “asset-light” foreign entrants lacking local obligations.
- **Flow:** Cautiously optimistic; believes uptake may be limited due to pricing, but calls for consumer protection parity.
- **GSOA:** Highlights satellite’s role in boosting resilience and expanding connectivity in hard-to-reach areas.

#### 5. Public Survey Highlights

- **89%** of respondents want satellite services in TCI, particularly the internet.
- **81%** interested in satellite internet services specifically.
- **45%** are dissatisfied with current telecom services.
- **Top motivations:** improved reliability, better rural access, business continuity, and emergency preparedness.
- **Key concerns:** affordability (45%), data privacy (28%), and mixed views on Starlink/Elon Musk.

## 6. Summary of Public Sentiment

- Strong dissatisfaction with current services, especially in Grand Turk, North, Middle, and South Caicos.
- Broad support for increased competition, infrastructure upgrades, and satellite alternatives.
- Calls for fair pricing, consumer protections, and transparent regulation.

## 7. Key Considerations for the Commission and Next Steps

### 7.1 Licensing Structure

- Do nothing, keep the existing licensing regime.
- Develop a licensing regime that accommodates both new satellite entrants and existing operators.
- Consider introducing a **Satellite Internet Service License (SISL)** with a flexible, light-touch model.

### 7.2 Fee and Taxation Framework

- Do nothing, use the existing fee structure
- Propose a **tiered fee structure** aligned with service type and scale.
- Require satellite operators to contribute to the **Universal Service Fund (USF)** or equivalent local initiatives.

### 7.3 Local Economic Participation

- Do nothing, maintain Islander Control, or
- Mandate local employment or capacity-building contributions for exemption from Islander Control.

### 7.4 Interference Management

- Adopt international standards (e.g., ITU, CEPT) while reserving national discretion for spectrum control.

### 7.5 Market Oversight

- Monitor pricing and consumer protection outcomes post-entry.
- Facilitate public education and transparency around satellite services.

## 8. Conclusion

The Commission extends its gratitude to all stakeholders and citizens who contributed to the consultation process. The insights gathered reflect a community eager for improvement and innovation. The Commission remains committed to ensuring that all policy outcomes serve the public interest, protect consumers, and promote a competitive, sustainable telecommunications environment in the Turks and Caicos Islands. The Commission will analyze the responses and issue a decision in due course, which will be published on our website at [www.telecommission.tc](http://www.telecommission.tc).

- **Annex 1: Public Consultation (Framework for Licensing Satellite- Internet Service**
- **Annex 2: Initial responses from stakeholders**
- **Annex 3: Replay responses from Stakeholders**
- **Annex 3 Survey Report (Public Opinion on Satellite Internet Service)**