FSM COMMUNICATIONS SECTOR PERFORMANCE AND EFFICIENCY: 2025 REPORT ON SIGNIFICANT MATTERS

Pursuant to s 319(4)(d) of the Telecommunications Act, this report (the 2025 report) covers significant matters relating to the performance and efficiency of the communications sector of the Federated States of Micronesia (FSM) in the year ending 30 September 2025 and up to the end of May 2026.

Appendix G of this report contains the **Annual Telecommunication Regulation Authority Report 2025**, which covers the financial year ending 30 September 2025. This report is released under section 319 of the FSM Telecommunications Act of 2014. Section 319 requires the TRA to produce an annual report on its activities for the previous financial year. The purpose of this report is to provide an update on the general activities of the TRA.

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Introduction to the TRA

The TRA regulates telecommunication services in the FSM. The TRA acts in the long-term interests of users of telecommunication services, such as internet and telephony services. The TRA is an *independent regulator*. This means that while we listen carefully to the concerns of consumers, the Government, telecommunications services firms, and others, we must make our own decisions based on the objectives set out in our Act.

The TRA's objectives are set out in the FSM Telecommunications Act of 2014 (the Act). The primary objectives are:

- provide clear rules for telecommunications services firms that focus on promoting the long-term interests of users;
- promote entry of new firms to invest in and provide telecommunications services;
- encourage competition between these firms to provide better services, better access, and better prices;
- encourage firms to spend money on telecommunications networks;
- ensure there are appropriate user rights and complaint processes; and
- make it easier for people in the FSM to access telecommunications services.

The TRA acts with consumers' best interests in mind. The primary way we do this is by supporting competition in the market. The drive for competition has come from Congress. In this sense, competition means two or more firms competing to win customers by improving the quality and prices of their services. Ultimately, we want to ensure that users receive good quality telecommunications services at the best possible price.

Summary: Preparing the mobile market for competition

FSM's telecommunications sector continues to change. Last year, the fixed internet market experienced significant development. Starlink's entry into the market gave consumers access to faster, more affordable services and forced the broader market to respond. That story remains important and continues to evolve as consumers continue to take up satellite internet. FSM Telecommunication Cable Company's (CableCorp's) upcoming open-access fiber network may also lead to additional competition in the fixed internet market.

This year, however, the main market development story has shifted to mobile. Fixed internet consumers now have more meaningful choices than they did several years ago. Mobile consumers do not. FSM Telecommunications Corporation (FSMTC) remains the only nationwide mobile provider, leaving consumers with no meaningful alternative for mobile voice, messaging, and data services. FSM also continues to stand apart from many Pacific peers, where mobile competition has already developed.

Mobile services are becoming increasingly central to everyday life. They are how people communicate, access information, run businesses, use digital services, and stay connected across islands and states. A more competitive mobile market is, therefore, one of the most important next steps in continuing market reform in the FSM telecommunications sector.

Mobile competition may now be closer

New entry into a mobile market is difficult, especially in a small and geographically dispersed country such as FSM. A new provider needs access to spectrum, a workable path to interconnection, confidence that it can compete fairly, and enough regulatory certainty to justify the investment.

Over the past year, several developments have made FSM's mobile market more credible for new entrants. Interconnection has been tested in practice through the agreement TRA made between FSMTC and iBoom!, showing that customers on different networks can be connected and that a key requirement for a multi-provider market can be achieved. Spectrum management is also progressing, with TRA working to resolve spectrum use issues to secure spectrum for new services, including for future 5G use. TRA has also declared FSMTC a dominant service provider in the mobile market in all four states. This does not change services or prices by itself, but it gives TRA a stronger framework to monitor conduct, assess potential future pricing issues, and protect consumers competition remains limited.

Potential mobile entrants are now assessing the FSM market more seriously. This is encouraging, but entry is not guaranteed. Interested providers will make their own commercial decisions based on market size, investment requirements, operating costs, spectrum needs, interconnection, regulatory risk, and expected returns. The challenge is to keep the path to entry clear, credible, and practical.

If entry proceeds, the benefits for consumers could be significant. Competition can put downward pressure on prices, improve service quality, encourage innovation, and prompt existing providers to offer better deals. The fixed internet market has already shown how quickly consumers respond when better choices become available. The next challenge is to create the conditions for similar competitive pressure in the mobile market.

New technologies may also change the mobile outlook

Conventional mobile entry remains the most immediate path to stronger mobile competition in FSM. However, new technologies may also change how the mobile market develops over time.

One important development is satellite direct-to-device (D2D) technology. D2D can allow compatible mobile phones to connect directly to satellites, rather than relying entirely on terrestrial mobile towers. In the near term, this technology is more likely to complement existing mobile networks than replace them. We expect this could include supporting basic connectivity, messaging, and emergency communications in areas

where mobile coverage is weak or unavailable. However, D2D could develop to provide a full range of standalone mobile services.

TRA has already taken steps to prepare for this technology. It has assigned spectrum to SpaceX that could be used for D2D services and is consulting the industry on the regulatory framework for D2D and related satellite spectrum issues. This work will help FSM prepare for D2D services in a way that supports innovation, protects consumers, manages scarce spectrum fairly, and preserves fair competition in the mobile market.

Fixed internet competition continues to evolve

While mobile is now the main market development focus, continued development of the fixed internet market remains important. One year on, Starlink's entry continues to reshape the market. Its Residential Lite satellite plans offer higher advertised speeds than existing fixed-line and other satellite services, at a lower price. Satellite internet subscriptions continue to grow, now accounting for 23 percent of the fixed internet market. The continued growth suggests that satellite internet is becoming a lasting part of consumer choice in FSM.

The TRA expects the fixed internet market to evolve further in the near future. FSMTC continues to expand its own fiber network, moving customers away from older DSL connections. Also, CableCorp's open-access fiber network is nearing completion, and, when complete, will create a pathway for smaller internet service providers to enter the market. Over time, we expect fiber will likely become the dominant service in urban areas, while satellite will remain important for the Outer Islands, remote areas, and locations where the fiber networks are not deployed.

Challenges ahead: Entry, coordination, and regulatory readiness

The next 12 months will be important for FSM's telecommunications sector. Three key challenges stand out:

- **FSM must turn potential mobile entry into actual competition**. Interest from potential international providers is encouraging, but it is not guaranteed to lead to investment. Interested providers will need to see a clear, practical, and credible pathway to entry. The FSM Government and its telecommunication entities must present a united, public signal that FSM is open to competition. If the path appears uncertain, FSM risks missing a rare opportunity to bring competition to the mobile market.
- **Future investment in fixed internet needs to be coordinated**. CableCorp is nearing completion of its open-access fiber network. The network is designed for retail providers to use shared network infrastructure rather than build their own networks, thereby lowering barriers to entry and reducing the costs of maintaining duplicated infrastructure. However, the benefits will only be realized if providers use the network and if future investment avoids unnecessary duplication of the network.

- **Regulation must keep pace with a growing market**. FSM's telecommunications sector is becoming more complex, with fixed-line services, satellite providers, upcoming open-access infrastructure, potential mobile entrants, and emerging technologies such as D2D services. TRA will need appropriate tools, resources, enforcement powers, and support to manage spectrum, monitor market power, enforce compliance, protect consumers, and support investment.

Government's role: Supporting a clear and coordinated market direction

TRA can help create the regulatory conditions for competition, but it cannot deliver market reform alone. Government has an important role in ensuring that FSM presents a clear and coordinated direction to operators, investors, public agencies, and consumers.

That message should be simple: FSM welcomes credible investment, supports fair competition, and expects public telecommunications assets to work together in the long-term interests of consumers. If the next phase is handled well, consumers could see more choice, better services, lower prices, and wider access to telecommunications services across all four states.

Purpose of the report

The purpose of this report is twofold: to fulfill the TRA's requirement under section 319(4)(d) of the Act to update the President of the FSM on the development of the FSM telecommunication market in the past 12 months, and to provide policy-makers, stakeholders, and the general public with an overview of the TRA's activities to date.

This report:

- Describes the current state of competition in the telecommunications sector, looking separately at the fixed internet and mobile markets
- Benchmarks prices and service quality in FSM to regional comparators
- Explains the TRA's work to date
- Discusses challenges the market is facing.

The mobile market is now the key focus for market development

2024-2025 was a year of development in the fixed internet market. Starlink launched in early 2024 into the FSM market with lower prices and higher speeds than existing satellite internet services. Consumers quickly adopted the new service options, and the market responded by adjusting prices and improving service quality to compete more effectively with Starlink. This showed that FSM consumers are willing to adopt new entrants that offer better services, and that existing providers will adapt to avoid losing market share.

The same level of progress has not occurred in the mobile market. There is no competition in the FSM mobile market. FSMTC remains the only nationwide mobile

service provider, leaving consumers with no meaningful alternatives for mobile voice, messaging, and data services. FSMTC's most basic mobile bundle also offers less mobile data than equivalent entry-level plans in almost every comparator country, with only the Solomon Islands offering less data. This makes mobile services the main remaining competition gap in FSM's telecommunications market. It also sets FSM apart from many Pacific peers, where mobile competition has already developed.

From our analysis, many Pacific peers with competitive markets have either experienced price decreases or significantly improved the value of services offered at the same or higher price over our period of analysis. This shows how competitive pressure can influence pricing and service quality in these markets over time.

This matters because mobile services are central to everyday life and are becoming increasingly important. They are how people communicate, access information, run businesses, use digital services, and stay connected across islands and states. A more competitive mobile market would therefore be an important next step in FSM's telecommunications development.

The focus of market development has therefore shifted. The fixed internet market remains important and continues to evolve, but the next major challenge is the mobile market. The key question for FSM is whether the mobile market can now move toward the same kind of competitive pressure that has already started to reshape the fixed internet services.

The mobile market is becoming more credible for new entry

New entry into a mobile market is difficult. A new provider needs access to spectrum, a workable path to interconnection, confidence that it can compete on fair terms, and enough certainty about the regulatory environment to justify investment. These issues are especially important in a small island market such as FSM, where scale is limited and the costs of entry can be high.

Since the last report, several key developments point to a more open and credible mobile market. While none of these developments are decisive on their own, taken together, they indicate progress towards a more dynamic and competitive market. These developments are:

- Interconnection with FSMTC has become more credible
- Spectrum management is improving and supporting future mobile market development
- TRA has strengthened its regulatory capacity in the mobile market
- Potential mobile entry may now be closer
- New technologies may also change the mobile outlook
- FSM's telecommunications market is becoming more active and engaged.

Interconnection with FSMTC has become credible

Interconnection is a core requirement for a consumer-friendly, multi-provider telecommunications market. It allows consumers on different networks to communicate with each other. Without it, a new mobile provider would struggle to offer a service that consumers could realistically use as a substitute for the incumbent provider. The interconnection between the two networks allows users on both networks to call and message each other directly. Without an interconnection, any call or message between the two networks would have to go through an expensive international connection.

In 2024, the TRA helped to establish FSM's first interconnection agreement between iBoom! and FSMTC to connect their respective networks. This marked an important regulatory and operational milestone, as interconnection agreements are often a prerequisite for effective competition in mobile markets.

Since then, both companies have worked hard to test and refine the physical connection. The TRA has had confirmation that the connection was successful, with iBoom! indicating that any remaining steps to activate interconnection services sit with them. This suggests the technical implementation phase is largely complete, with remaining work focused on operational readiness.

This is positive news for the mobile market, as it signals that interconnection is possible in FSM, and that one of the practical requirements for a multi-provider market can be achieved. This development should be welcomed by both consumers and service providers considering entry into the FSM market. It provides greater confidence that a multi-provider environment is technically feasible and that regulatory and operational systems can support it.

Spectrum management is improving and supporting future mobile market development

The TRA has been working to open up additional spectrum for future mobile services and operators. The TRA has made progress in resolving an ongoing spectrum overuse issue, improving overall spectrum management, and providing greater clarity on spectrum availability. Completion of this work will open up additional spectrum in the 700, 900, and 1800MHz bands.

Work is now beginning to identify additional spectrum that can be opened for 5G services, with a view to supporting future investment, innovation, and market entry. This work will take time. However, while the spectrum is not available now, the work benefits the market by creating a clearer view of the spectrum that may be available for mobile services in the near future. This helps reduce uncertainty for potential investors and provides a clearer pipeline of future spectrum availability to support planning and investment decisions.

Taken together, these developments show a more active and forward-looking approach to spectrum management, aligned with both current market needs and longer-term market development. This suggests a shift towards more structured planning of spectrum

resources, which can support both improved service delivery and the conditions needed for greater competition over time.

TRA has strengthened its regulatory capacity in the mobile market

Since the last report, the TRA has designated FSMTC as a dominant service provider (DSP) in the mobile market in all four states. This followed a DSP investigation across the telecommunications market in FSM. This is an important development in a market where consumers continue to have limited alternatives for mobile services.

Competition remains the preferred way to improve prices, service quality, and consumer choice. However, while the mobile market remains concentrated with only one active service provider, TRA needs a clear framework to monitor market conduct and respond if consumer interests are at risk.

The need for this framework became clearer following recent market developments. In August 2025, FSMTC announced via a mass-market text message that it planned to increase mobile plan prices.[1] As FSM's only active mobile service provider, FSMTC's announcement highlighted the practical limits of consumer choice in the current market. Consumers have no ability to switch providers in response to price changes.

The DSP declaration does not, by itself, impose immediate price controls or change the services available to consumers. However, it provides TRA with a stronger basis for assessing future pricing and market conduct, and for considering further regulatory measures if effective competition does not emerge. This strengthens the foundations for mobile market development. It provides a safeguard for consumers under current market conditions, while also helping create a more credible regulatory environment for future entry.

Potential mobile entry may now be closer

Potential mobile entry may now be closer. The market conditions needed to support new entry are starting to fall into place, and this is now being reflected in more serious interest from potential mobile service providers. The increased level of interest suggests that the structural barriers, while still present, may be gradually easing as the regulatory framework strengthens and as confidence in the market environment increases.

Up to two new mobile service providers are showing active interest in entering the FSM mobile market. The TRA met with both potential new entrants at the Pacific Telecommunications Council (PTC) 2026 conference in Honolulu to discuss their interest, the current market conditions, and the practical requirements for providing services in FSM. Since then, the TRA understands that the companies have continued to assess the opportunity, including through due diligence and fact-finding work. One company has already visited FSM as part of that process and is indicating that interest may now be progressing beyond preliminary discussions into more detailed market assessment activities.

[1] To the best of TRA's knowledge, FSMTC has not yet followed through with any price increases.

This is an important development. Competition in the mobile market has been long-awaited, with FSM continuing to stand out from other Pacific Island countries by having only one nationwide mobile operator. The lack of competition appears to be preventing improvements to mobile service offerings. For example, since 2021, mobile plan prices and plan parameters in FSM have not changed. During the same period, other Pacific markets have continued to adjust both the price and value of their plans. We illustrate this in the table below, highlighting that nearly all Pacific markets have increased the number of gigabytes in their mobile plans.

Figure 1.1: Mobile plan comparison across Pacific comparator countries 2021-2026

Country	Number of mobile providers	Change in price of most basic mobile plan offering	Change in number of gigabytes of mobile data in most basic plan mobile offering
FSM	1	0%	0%
Tonga	2	↓ (45%)	↑ 250%
Vanuatu	3	↓ (2%)	↑ 150%
Kiribati	2	↓ (43%)	↑ 256%
Samoa	2	↑ 3%	↑ 700%
Solomon Islands	2	↑ 8%	0%
Fiji	3	0%	↑ 761%

The current level of interest suggests that potential providers are now assessing FSM more seriously than in previous years, reflecting growing confidence in the market and the broader regulatory and technical developments that have taken place.

New entry is not guaranteed. Potential entry remains a commercial decision for the companies involved. Potential providers will need to assess market size, investment requirements, spectrum needs, interconnection arrangements, operating costs, sovereign risk, regulatory risk, and expected returns before deciding whether to proceed. In a small island market such as FSM, these considerations can significantly influence whether entry is commercially viable.

The current level of engagement is encouraging. If entry proceeds, stronger mobile competition could bring meaningful benefits for consumers. The fixed internet market has already shown what can happen when consumers are offered better choices: prices can fall, service quality can improve, and existing providers can respond with better offers. Demonstrating how competitive pressure can influence both pricing and service quality, even in smaller telecommunications markets.

New technologies may also change the mobile outlook

Conventional mobile entry remains the most immediate path to stronger mobile competition in FSM. However, it may not be the only way that the mobile market changes over time. Technological developments, changes in spectrum use, infrastructure-sharing arrangements, and satellite-based services may also influence how competition and consumer choice develop in the future.

New technologies are emerging that can change how mobile connectivity is delivered, particularly in remote outer islands. These technologies may create new ways to extend coverage, improve resilience, and provide services in areas where traditional mobile infrastructure is difficult or expensive to deploy. One of these technologies is satellite direct-to-device (D2D) technology. These services enable compatible mobile phones to connect directly to satellites, without relying entirely on terrestrial mobile towers.

This technology is still developing and is not yet a full substitute for terrestrial mobile networks. As such, any near-term deployment of this technology in FSM would likely require a partnership between the D2D provider and existing mobile service providers. However, as the technology develops, D2D services may become a stronger complement to, or substitute for, terrestrial mobile services.

The foundations for D2D services in FSM are beginning to be put in place. TRA has assigned spectrum to SpaceX that could be used for D2D services, creating a pathway for this type of innovative mobile satellite service to develop in FSM. Additionally, TRA is continuing to develop the regulatory framework for D2D services and related satellite spectrum issues. This includes consulting with the industry on how these services should be deployed in FSM, including how spectrum should be managed in a fair, transparent, and non-discriminatory manner.

FSM's telecommunications market is becoming more active and engaged

The developments in FSM's mobile market are a part of a wider change in FSM's telecommunications market. The market is becoming more active, more closely watched, and more engaged than in previous years. This can be seen in several ways:

- Consumers have shown that they are willing to move to new services when better options become available
- Existing providers are responding to competition and changing market conditions
- Potential entrants are assessing opportunities to invest in FSM more seriously
- Service providers and other stakeholders are also engaging with TRA more actively across its work program.

This improved engagement is not a market outcome itself. However, it is an important sign that FSM's telecommunications market is becoming more mature and established.

Greater interest in the FSM telecommunications market suggests that regulatory processes are becoming more relevant to how market participants assess the market. Some providers are responding to consumer demand and technology change, and

considering the regulatory framework that shapes how the market can develop. This is a positive sign for FSM, indicating a market in which TRA's decisions are becoming increasingly understood as part of the commercial and competitive environment, rather than as a background administrative process.

The internet market continues to be dynamic and is growing

Starlink's impact on the fixed internet market continues

Since Starlink entered the market, consumers have had access to faster and more affordable fixed internet options than were previously available. Starlink's residential Lite plan is available in most Pacific peers and offers advertised download speeds of 50–100 Mbps, with prices ranging from US$35 to US$45.

- Starlink's residential lite plan price is lower than FSMTC's basic fiber plan, which costs $49 per month
- Starlink advertises typical download speeds of 50–100 Mbps compared to FSMTC's basic fiber (Kaboom Bronze package) speed of 10 Mbps
- This results in a significant difference in service value when measured by speed and price per Mbps. Starlink offers approximately $0.50–$1 per Mbps, while FSMTC's equivalent offering is around $4.90 per Mbps.

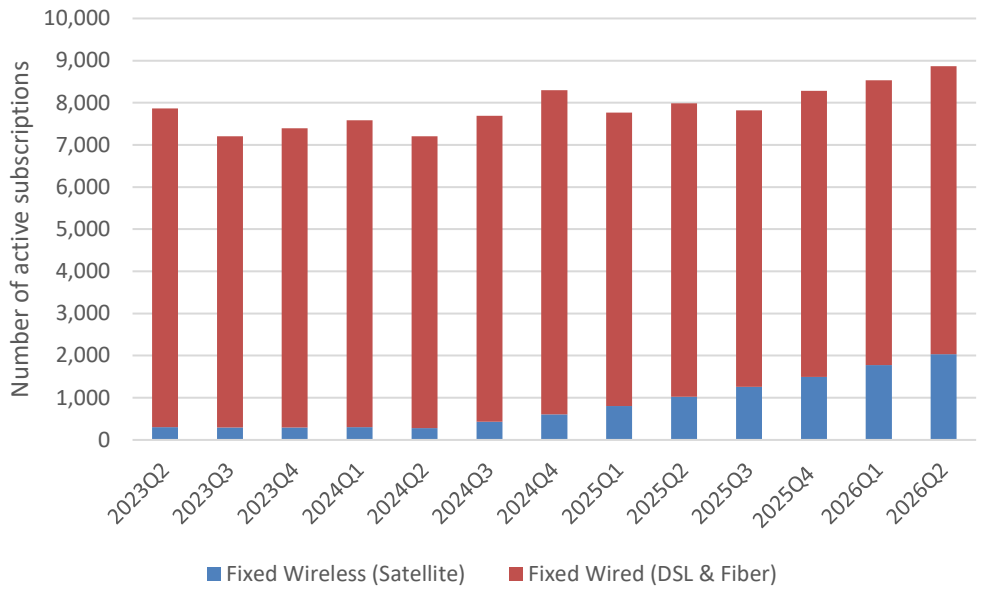
One year on from Starlink's entry, the satellite market continues to show strong growth. Satellite internet subscriptions have continued to increase significantly, suggesting that satellite internet in FSM may not just be a short-term disruption, but a lasting change in consumer choice.

FSM consumers can now buy fixed wireless internet plans from a range of providers, including Kacific (satellite), MCS Pohnpei (Kacific reseller, satellite), Starlink (satellite), and FSMTech (Starlink reseller, satellite).

The continued growth in satellite subscriptions demonstrates that many consumers value the combination of higher speeds, lower prices, and easier access to service. Satellite now accounts for 23 percent of the fixed internet market, an almost 80 percent increase since the previous market development report. The wider market continues to respond to satellite competition. Fixed internet offers are increasingly being shaped by the need to compete with satellite services, particularly on pricing, speed, and service quality.

Figure 1.2 highlights the growth in satellite subscriptions in the FSM fixed internet market. This is particularly evident since Starlink's launch in the FSM in late 2024.

Figure 1.2: Fixed wireless vs fixed wired subscriptions



Source: Operators' quarterly report data

In Figure 1.2, we can see some significant shifts in the internet market. Despite fluctuations, the overall internet market is growing, increasing from 7,800 in 2023 to 8,800 in 2026. While the fixed-wired segment has declined, satellite internet uptake has increased substantially, indicating that satellite services are not only expanding the overall market but are also replacing a portion of traditional wired connections. At the same time, the growth in total connections suggests that satellite technology may be improving access for users who previously had limited or no internet connectivity, particularly in areas where fixed infrastructure is not available.

The fixed internet landscape is continuing to change

While the main market development story has shifted to mobile, the fixed internet market remains an important part of FSM's telecommunications progress. It is also the part of the market where the effects of competition are currently most visible. Starlink is no longer just a short-term solution, but is likely to remain a key part of the market going forward. Other providers will need to continue adapting their fixed internet offers in response to ongoing competition from satellite services.

FSMTC has continued expanding its fiber network, while more customers are moving away from older DSL services. This suggests the market is continuing to shift toward newer technologies that can provide higher speeds and improved service quality.

As the market continues to develop, different technologies may increasingly serve different parts of FSM. Given FSM Telecommunication Cable Corporation (CableCorp)'s ongoing open-access fiber-to-the-premise (FTTP) rollout, and FSMTC's intent to roll out more fiber supported by the United States of America's Rural Utilities Service (RUS) grant funding, fiber technology will become the dominant service type in urban areas where

fiber access is possible, particularly for consumers requiring higher speeds, greater capacity, and lower latency. Satellite services will become the dominant service option for consumers in outer islands, remote areas, or difficult-to-reach terrain where fixed-line service does not reach. Together, these developments should lead to an internet market that remains active and continues to evolve in a direction shaped by competition, network investment, and changing consumer choices.

CableCorp may play a key role in the next stage of fixed internet development

CableCorp's open-access fiber network may become an important part of the next stage of fixed internet market development. As the network moves closer to launching, wholesale fiber access could become a realistic pathway for smaller internet service providers (ISPs) considering market entry.

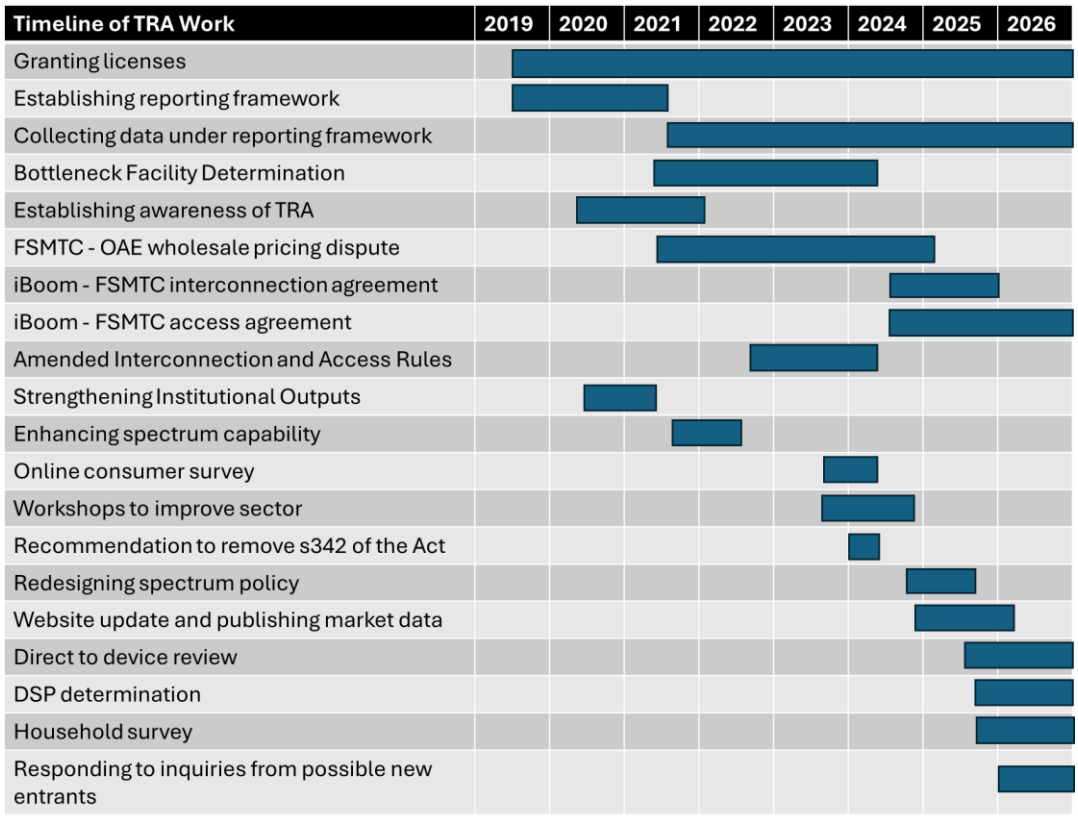
CableCorp's open-access wholesale model creates new opportunities for competition within the fixed internet market. Smaller ISPs may emerge to compete on a large scale or in niche areas of the market, increasing the range of service options available to consumers.

Consumers could benefit from a more diverse fixed internet market, including greater competition across fiber services. Increased competition may place further pressure on providers to improve pricing, service quality, and product offerings. The development of CableCorp's network, alongside the continued growth of satellite services and the expansion of FSMTC's existing fiber infrastructure, suggests that the fixed internet market in FSM will likely continue to evolve over the coming years.

TRA's work to improve sector performance

Within the bounds of its mandate, the TRA has actively carried out its functions to advance the objectives of the Act. Figure 1.3 shows the timeline of the work. Outputs completed during the 2025 FY are described below. Previous outputs are described in Appendix E.

Figure 1.3: Timeline of major TRA work to date



Issuing mobile spectrum

In October 2025, we granted SpaceX satellite spectrum in the 2GHz "S-band". This mobile satellite spectrum creates the opportunity for SpaceX to deploy direct-to-device (D2D) services in FSM. D2D services allow mobile services, such as SMS messages, calls, and mobile internet, to be provided via a satellite link rather than via a connection to nearby cell towers. This technology has the potential to extend mobile coverage to remote locations around FSM.

Redesigning spectrum policy

In April 2024 (FY24), the TRA started to explore the need for a redesigned spectrum policy. With iBoom! entering the cellular mobile market, the TRA wanted to ensure that its spectrum policy provided maximum benefit for consumers by balancing the needs of current operators and reserving sufficient spectrum for future new entrants.

The TRA worked on designing a new spectrum assignment policy that efficiently allocates spectrum to service providers in a fair and non-discriminatory way, while also making enough spectrum available for new entrants to enter the market.

The TRA held a consultation process with service providers in December 2024 to get feedback on the revised spectrum policy. Following feedback, the TRA issued the final

policy in March 2025. The revised policy ensures that FSM's telecommunications market will be able to support at least three nationwide mobile operators.

Involvement in telecommunication disputes

The TRA is involved with the following current ongoing disputes:

- iBoom asked the TRA to intervene in its request to access dark fiber owned by FSMTC to provide fixed internet and mobile services in Yap. The TRA determined an access agreement on 19 September 2024. As no implementation issue has been brought to TRA, TRA considers the matter inactive unless either party seeks further assistance in relation to the determined access agreement.
- iBoom asked the TRA to intervene in its request to negotiate an interconnection agreement with FSMTC to allow iBoom's mobile customers and FSMTC's mobile customers to call each other at local rates. The TRA determined an interconnection agreement on 13 December 2024. The TRA has had confirmation that the connection was successful, with iBoom! indicating that any remaining steps to activate services sit with them. TRA considers this matter resolved.

Direct to device spectrum allocation and consultation

As noted earlier, the TRA licensed spectrum to Starlink in a mobile satellite frequency band, known as the S-Band, for the first time in FSM. This is part of ongoing work to manage FSM's radio spectrum. This assigned spectrum is an important step in enabling new types of mobile and communication services via satellite, which could help improve connectivity in remote and underserved areas.

On 16 February 2026, we released a consultation paper on 'Direct to Device Mobile Satellite Service'. This invited public comments and input on whether we should amend the Spectrum Licensing Rules and the Schedule of Fees Rules to add a new category of frequency license and associated license fees, respectively, to support the introduction of D2D mobile satellite services and to promote competition among D2D service providers in the FSM.

TRA received five submissions from the telecommunications industry in response to our consultation. We are now considering the feedback to shape our draft determination.

Website updates

In FY2024, the TRA commenced an internal project to update its website and provide up-to-date market data and information to consumers, service providers (current and prospective), and telecommunication sector stakeholders. This update included two main components:

- market data and insights for consumers and telco service providers, and
- a guide on how to enter the market, to help individuals and firms interested in providing telecommunication services in the FSM.

In February 2026, we updated specific graphs on these pages on the website and added new graphs on mobile penetration. These provide consumers and telco service providers with the most up-to-date information where possible. Further website work is planned under project funding.

Dominant Service Provider (DSP) determination

During FY25, we investigated whether any provider held a dominant position in the key telecommunications markets across the four States of FSM. We defined three principal retail product markets for the investigation:

- fixed voice services
- fixed internet access services, and
- mobile services.

We also considered wholesale service markets in the review.

We released a consultation paper on 'Dominant Service Provider Determinations' on 14 November 2025 and sought public feedback. We then published our draft decision on 15 December 2025 and invited further submissions on our proposed market definitions and preliminary findings.

Following our investigation, we determined that FSMTC is a DSP in the retail mobile market across all four States of FSM. We did not determine that any provider is a DSP in the retail fixed voice market, the retail fixed internet access market, or the wholesale service markets considered in the investigation. We also determined that the retail fixed voice, retail fixed internet access, and wholesale service markets did not require further investigation at this time. We will continue to monitor developments in both the mobile and internet markets. We published the final determination on 13 March 2026.

Household survey preparations

Over the past financial year, the TRA has been preparing to run a household telecommunications survey. The survey will be a follow-up from the 2023 Online Telecommunications Survey and will be TRA's first in-person survey.

In October 2025, TRA began planning the survey and preparing draft questions. We then ran the tender for the 2026 FSM Household Survey from late December 2025 through to early February 2026. At the request of the World Bank's Digital Project team, TRA simultaneously ran procurement for the Department of Health and Social Affairs (DHSA)'s Women-Led Business Digital Access Survey. We asked bidders to propose how they would run the surveys simultaneously to achieve cost efficiencies. The TRA is confirming with DHSA and will announce the successful bidder once all parties have agreed and contracts are signed.

The survey is due to happen at an opportune time. Starlink has been operating for a year and is providing competition to FSMTC fiber in the fixed internet market. The survey may also capture the market's state before a potential new full-service entrant joins.

The TRA plans to conduct a follow-up survey every 2-3 years, with the next survey likely to take place after a second full-service operator is fully operational and providing competition across the market.

Responding to inquiries by new entrants

The TRA has been responding to inquiries by potential new entrants. As part of our work to encourage competition, we created a market information pack to send to interested parties in April 2025.

The TRA was made aware of potential new entrants' interest in the FSM telecommunications market. The TRA met with both potential new entrants at PTC 2026 in Honolulu to discuss their interest, the current market conditions, and the practical requirements for providing services in FSM. Following these meetings, we provided the potential new entrants with updated market information and entry packs. We were also contacted by a small regional operator in June 2025, asking for information about entering the FSM market. TRA sent a letter welcoming further discussion and a market information pack to their Board.

Complaints procedures

The TRA reviewed all FSM service providers' consumer complaint procedures. We audited operators' complaints processes and found that some operators did not have adequate complaints processes. We drafted a letter to operators and sent it out on 25 October 2024. The next step is to assist operators in improving their compliance with existing rules and to consider initiating a consultation process to change the Rules, including the requirement to publish and distribute the complaints process information.

Sector challenges

The FSM telecommunications sector is becoming more active and more complex. Fixed internet competition has continued to develop, potential mobile entrants are assessing the market, and new technologies such as satellite direct-to-device services are on the horizon. These developments create opportunities for consumers, but they also create practical challenges for operators, infrastructure providers, the government, and the TRA.

The TRA considers that the sector will face the following key challenges in the next 12 months:

- Turning potential mobile entry into actual competition
- Coordinating fixed internet investment as CableCorp moves toward launch
- Ensuring regulation keeps pace with a more complex market

Turning potential mobile entry into actual competition

FSM may have a near-term opportunity to achieve mobile competition, but entry is not assured. Interest from potential providers appears to be increasing, and key conditions

for entry, such as spectrum availability, interconnection, and licensing, are becoming clearer. However, interest alone will not translate into market entry unless providers see a credible and workable path to launch and operate.

The core challenge is to convert this interest into a firm investment decision. FSM's small and geographically dispersed market already makes the commercial case finely balanced. Any additional uncertainty around regulatory processes, access to infrastructure, or how the market will function in practice can deter entry.

This is not about offering special treatment. It is about ensuring that the pathway to entry is clear, predictable, and practical. Licensing processes need to be transparent and timely, and any reliance on wholesale inputs or shared infrastructure needs to be well understood. Just as importantly, public institutions need to send consistent signals that FSM supports fair competition and credible private investment.

If these conditions are not in place, potential entrants may delay or withdraw. In that case, FSM risks missing a rare opportunity to move from the prospect of competition to actual competitive outcomes for consumers.

Coordinating fixed internet investment as CableCorp moves toward launch

As FSM Telecommunication Cable Corporation (CableCorp)'s open-access network moves closer to launch, the key challenge is not simply completing the build, but ensuring the network is actively used to support competition and better services.

CableCorp's model is intended to lower barriers to entry by allowing retail providers to use shared infrastructure rather than build their own networks. Whether this delivers real benefits will depend on whether existing providers choose to use the network and whether new entrants see a viable pathway to participate.

The challenge, therefore, is one of practical coordination. Government, CableCorp, FSMTC, other service providers, and development partners will need to align on how the network will be used and how the market will evolve. This includes providing clarity on where the network will be available, how wholesale access will work in practice, how retail providers can connect and compete, and how future investment can avoid unnecessary duplication.

If this coordination is effective, CableCorp's network can become a platform for greater retail competition, with providers competing on price, service quality, and customer experience. If it is not, there is a risk of fragmented investment, duplicated infrastructure in some areas, gaps in others, and weaker returns on public investment. In that scenario, the benefits of the open-access model may not be fully realized.

Ensuring regulation keeps pace with a more complex market

FSM's telecommunications market is no longer a simple market served by a single operator and a single set of technologies. The sector now includes satellite providers,

fixed-line services, potential mobile entrants, open-access infrastructure, and the potential for emerging technologies such as D2D satellite services.

This creates a challenge for the regulatory framework. The TRA needs to support investment and innovation, while also protecting consumers, managing scarce spectrum, monitoring market power, and ensuring that operators compete on fair terms. These issues will become more important as the market becomes more active and as providers make commercial decisions based on regulatory settings.

The challenge for the next 12 months is to ensure that regulatory tools, legislation, and market processes remain fit for purpose. This includes continued work on spectrum planning, interconnection, consumer protection, operator reporting, and proportionate enforcement. Effective regulation will be important not only for protecting consumers, but also for giving operators and potential entrants confidence that FSM is a stable and credible market.

Appendix A: Additional notes to the President

[c-i-c[redacted]]

Appendix B: Analysis of the Adequacy and Quality of Services in the FSM Telecommunications Market

The TRA has designed and implemented an information-gathering and monitoring process for the FSM. The TRA collects quarterly revenue and operational data from the market operators to monitor and report on the sector. The TRA continues to work with market operators to ensure full compliance with the request for information.

Therefore, our assessment of the adequacy and quality of services relies on the TRA's collected information, publicly available information (including FSMTC's annual report and website), data available from international databases (such as the International Telecommunications Union), and our research into offerings from Pacific telecommunications providers.

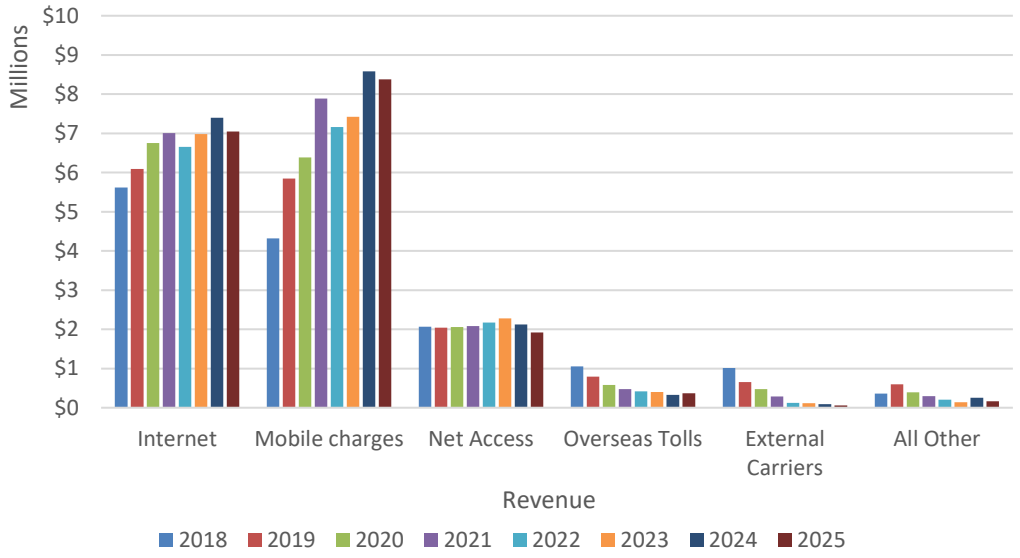
Key observations are set out in boxes for easy reference.

Telecommunications market revenue trends

The FSM Telecommunications Corporation (FSMTC), a full-service mobile and fixed-line telephone and internet provider, is the main telecommunications provider in FSM and the only provider to release annual revenue reports. We track FSMTC's key retail service revenues below.

Key segments of retail services include fixed internet connections, mobile, and fixed landline services. There is a continuing trend of mobile services, particularly mobile broadband, becoming increasingly important, while landline services decline.

Figure B.1: Annual Revenue from Retail Telecommunications Services, FSMTC



Source: FSMTC Annual Reports. Excludes discounts and recovery of bad debts.

Current mobile services include 3G/4G mobile (depending on location), calls, and SMS messaging. Fixed internet offerings include FTTP, ADSL, and Very High Bitrate Digital Subscriber Line (VDSL). FSMTC's VDSL connections require a direct physical connection to the terrestrial Fiber Optic network. FSMTC also offers fixed phone lines, wireless internet service through Wi-Fi hotspots across all states, and cable television service.

We benchmark FSM's services against a sample of other Small Island Developing Countries (SIDCs)

Table B.1 compares the countries we studied for comparison with FSM. There are many possible drivers that impact the customer demand for telecommunications services across different countries. We seek to measure key drivers to identify suitable comparator countries for the FSM market. The key drivers considered include:

- Population served: a larger population reduces fixed costs per customer, providing economies of scale
- The proportion of population in urban areas: a higher proportion reduces cost per customer at a given quality of service level for mobile services, since it is cheaper and easier to service a smaller geographic area than a larger area with the same number of subscribers
- Submarine cables: the presence of submarine fiber-optic cables improves service levels and reduces operating costs for providers relative to satellite connections. This is closely related to the degree of geographic isolation of the islands; for example, Caribbean islands are arranged in a chain and are much better served with cable infrastructure[2]
- The income levels of residents: higher income consumers will be able and willing to pay for a higher quantity and range of services. We look at Gross National Income (GNI) per capita as the best proxy measure for this
- The proportion and wealth of the population living and working in other countries: a larger overseas diaspora increases the demand for communication services for family and friends to stay in touch remotely. Family members from overseas may also subsidize telecommunications hardware and service costs for local family members. We use remittances as a percentage of gross domestic product (GDP) as a proxy for this driver.

In the table below, we highlight country metrics that are no more than 50 percent above or below the FSM's equivalent metric. We consider countries with two or more metrics similar to FSM to be appropriate comparators. We also include strategically important countries for comparison, such as Fiji, which often serves as a best-case benchmark for telecommunications services in the Pacific.

[2] See https://www.submarinecablemap.com/#/

Table B.1: SIDC Comparison Sample

Country	Area	Mobile operators/internet service providers	Country Population	Urban Population (% of total)	GNI per Capita (US$)	Remittances as % of GDP
FSM	Pacific	**4 - FSM Telecom, Starlink, and Kacific (internet only), iBoom (Yap only)**	75,817[3]	22%	4,240	5.1%
Countries in the Comparator Sample						
Fiji	Pacific	3 - Digicel (Mobile Only), Vodafone, TFL (broadband)	918,218	59%	5,820	9.2%
Samoa	Pacific	2 - Vodafone Samoa, Digicel (Samoa) Ltd (Mobile only)	211,304	18%	5,040	28.2%
Solomon Islands	Pacific	4 - Solomon Telecom/Our Telekom, Bmobile-Vodafone (Mobile only), SatSol, Solkonet (Internet only)	806,420	30%	2,680	5.2%
Tonga	Pacific	3 - Digicel Tonga Ltd (Mobile only), Tonga Communications Corporation Ltd, Wantok	99,896	21%	5,910	41.9%

[3] The 2023 FSM Population and Housing Census reports a resident population of 75,817.

Population estimates use census data for each country and linear interpolation to estimate annual populations between census years.

Vanuatu	Pacific	3 - Digicel (Vanuatu) Ltd, Vodafone Vanuatu (Formerly Telecom Vanuatu Ltd), Wantok	327,579	22%	3,890	12.9%
Kiribati	Pacific	2 - Amalgamated Telecom Holdings Kiribati, Ocean Link (mobile only)	126,880	63%	3,660	4.2%
Grenada	Caribbean	2 - Digicel, Flow	109,715	37%	10,510	5.3%
Countries not in the Comparator Sample[4]						
Marshall Islands (RMI)	Pacific	1 – Marshall Islands National Telecommunications Authority	39,196	79%	8,500	13.3%
Palau	Pacific	2 - Palau National Communications Corporation, Palau Telecoms / PT Waves	17,576	79%	14,780	0.7%
Dominica	Caribbean	2 - Digicel, Flow	66,205	74%	10,230	5.3%

Source: World Bank data, 2024

Population estimates use census data for each country and linear interpolation to estimate annual populations between census years.

Using the metrics in Table 1, the best comparators would be Tonga, the Solomon Islands, and Kiribati, followed by Vanuatu and Samoa. We also include comparisons with Fiji and Grenada, recognizing that these markets differ substantially, especially in terms of population. The Republic of the Marshall Islands (RMI) and Palau are geographically close

[4] We provide a comparison of key telecommunications indicators in FSM, Palau and the Marshall Islands in Appendix C

to FSM, but are different in terms of demographics and are not sufficiently similar as per our criteria in Table B.1. Palau has a geographically concentrated population that is one-fifth the size of the FSM's, and a GNI per capita 3.3 times higher than the FSM's. RMI has a population approximately one-third that of the FSM's, and has a much higher urban population, GNI per capita, and higher remittances as a percentage of GDP. Given these differences, we do not consider Palau and RMI to be comparable countries. Dominica also differs substantially from FSM in terms of economic metrics and urbanization levels, so we do not use it as a comparator.

All our comparison countries have retail market competition

New market entry has the potential to increase service quality and reduce costs through competition. A new provider will enter the market only if it sees the potential to make a profit. It will price its services to gain market share. This can also prompt the incumbent to improve quality and reduce prices.

The comparison countries each have their own individual characteristics, but all share some important characteristics with the FSM. Based on our comparison, there is no obvious characteristic of the FSM sector that would prevent competition. For example, the FSM's small population does not appear to be a barrier, as comparators with similar and smaller populations have more than one retail provider.

Given the successful full-service market entry that has occurred in many Pacific SIDS over the last 15 years, the FSM is an outlier, with just a single full-service telecommunications retail supplier offering mobile services. Competition is now present on the fringes of the fixed internet market, with the arrival of Starlink having a significant impact on lowering prices and improving service quality. However, nationwide mobile competition is yet to arrive. The FSM can address this by continuing with reform efforts, completing the open-access FTTP network, and sending strong signals to investors that the market is open and the regulatory framework is robust and able to support new entrants.

We focus on mobile phones and fixed internet services

While landlines remain an essential service for many users, they are increasingly being superseded by newer mobile and internet technologies. Similarly, satellite television services are being replaced by online services providing similar content. Therefore, mobile services and fixed internet are the most important services for evaluating market performance.

Adjusting for service quality presents challenges. For example, connections could be cheap but unreliable or have actual speeds that do not meet advertised ones. It might also be difficult to obtain a new connection that meets the advertised characteristics. Due to data limitations, we cannot directly address service quality at this stage and have relied on the available data.

Access to Telecommunications Services

This section compares how widely telecommunications services are used in FSM relative to comparator countries. We look at three indicators, internet use, mobile penetration and fixed internet penetration. Together, these indicators provide an overview of telecommunications use and how FSM compares with other small island developing countries.

Mobile and fixed internet penetration is calculated by comparing the number of subscriptions with the population. We focus on actual use, rather than theoretical network coverage, because actual use reflects whether services are available, affordable and of sufficient quality for people to use.

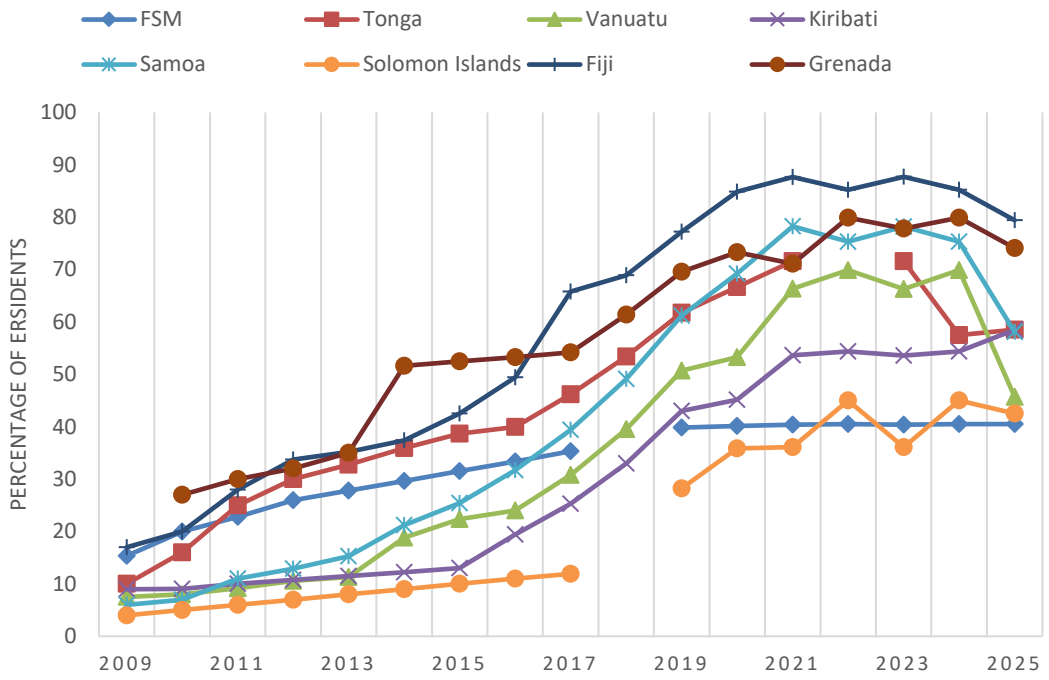
Subscription data is sourced from the International Telecommunication Union (ITU) and, where necessary, DataReportal. For several data series, the latest ITU data is available only to 2022, and for some indicators to 2023 or 2024. Population figures are based on official national census data. To estimate the population between census years, we interpolate between the two most recent census populations for each country.

We use census-based population estimates because the 2023 FSM Population and Household Census recorded a substantially smaller population than the estimates available when the prior Market Development and Annual Reports were prepared. Using the census data provides a more accurate estimate of fixed internet and mobile penetration in FSM. For the comparator countries, the differences between previous population estimates and latest census-based estimates are small, so the updated population figures have little effect on the analysis compared to prior years.

FSM has the lowest internet use rate among our comparator countries

Updated data on internet use shows that, as of 2025, the FSM has the lowest internet use rate among our comparator countries. The latest data from Datareportal (2025) showed that around 40 percent of the population used the internet. FSM's internet use rate has not improved significantly over the past five years, while all comparator countries have recorded substantial increases in internet use since 2017. Some reported data show declines in the percentage of residents using the internet over the last few years. We expect these to reflect only data discrepancies or changes in collection methods, rather than an actual reduction in internet usage. Figure B.2 below shows the proportion of people who use the internet over time.

Figure B.2: Percentage of Residents who use the internet



Source: International Telecommunications Union, 2009-2022, Data Reportal Digital report, 2023-2025

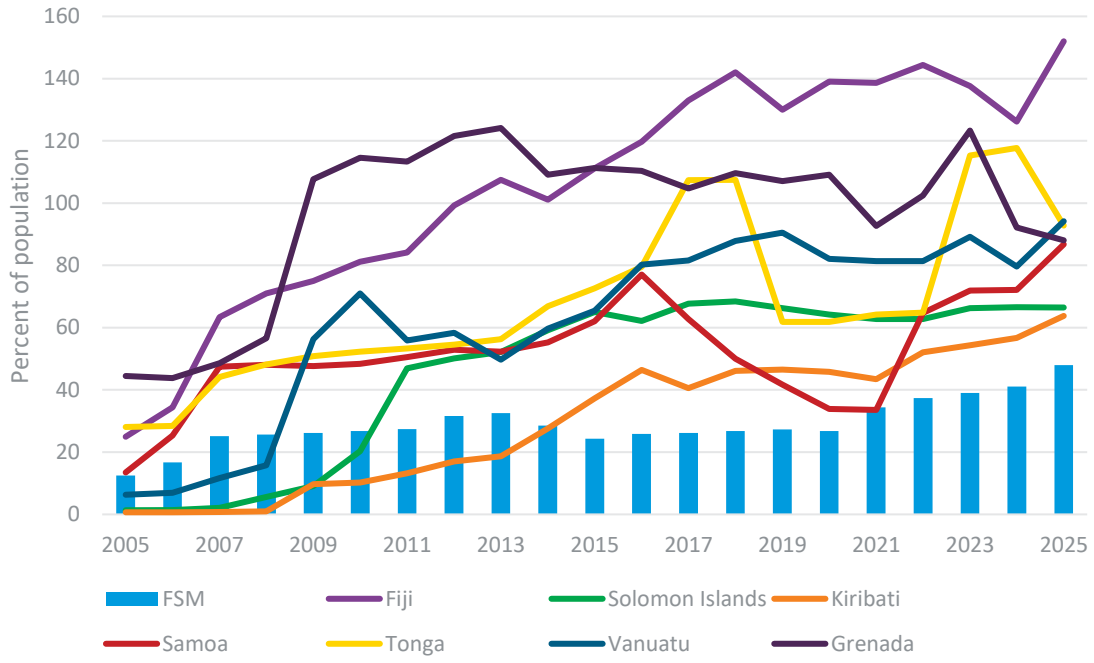
Internet use estimates are taken directly from DataReportal and have not been updated to reflect the 2023 FSM Population and Household Census. Therefore, internet usage is likely to have risen in recent years. DataReportal does not publish the underlying data required to consistently recalculate this indicator. The published DataReportal figures are used to ensure a consistent comparison across FSM and the comparator countries.

The FSM's slow growth path in internet use penetration has seen it fall from the second-highest to the lowest. Throughout the period presented, the rest of the Pacific comparator SIDCs have seen significant growth in penetration rate on average, particularly since 2017. The TRA closely monitors this data, as competition from Starlink has the potential to drive penetration rates, particularly in rural and remote areas outside fixed-wired network coverage.

FSM has the lowest mobile penetration among our comparator countries

Updated data on mobile phone use confirms that the FSM still has relatively low rates of mobile phone use. Figure B.3 below shows the proportion of people with mobile phone subscriptions (pre-paid and post-paid) over time.

Figure B.3: Percentage of Residents with Mobile Plan (Pre- or Post-Pay) Subscriptions



Sources: Population estimates use census data for each country and linear interpolation to estimate annual populations between census years.

Mobile subscription data are sourced from the ITU where available, with DataReportal used only to fill missing data for 2023–2025, and TRA subscriber data used for FSM.

ITU estimates are used for Samoa and Tonga during the COVID-19 period where actual reported data was unavailable.

Between 2010 and 2025, mobile subscriptions in FSM increased from 12.5 to 47.9 percent. This reflects both an increase in mobile subscriptions and a decline in the population. During this period, the number of mobile subscriptions increased by about 25 percent, while the estimated population declines by approximately 34 percent. While there has been some real growth in mobile subscriptions, the increase in the penetration rate is driven mainly by the reducing population rather than by growth in subscriptions. This stands in contrast to the comparator SIDCs, where increases in mobile penetration have been driven mainly by growth in mobile subscriptions. Despite the revised population estimate, mobile penetration in FSM remains below most comparator countries. The continued lack of competition in the FSM mobile market is likely a contributing factor, as all other countries in the analysis have at least two mobile service providers.

The impact of liberalizing mobile markets and the subsequent increase in competition can be clearly identified in several countries:

- Tonga—already had two suppliers in 2005; however, one was the state-owned incumbent Tonga Communications Corporation, while the other (TONFON) belonged to the King of Tonga. In 2007, TONFON was sold to Digicel as part of the program to have King Tupou VI withdraw from commercial interests in Tonga, marking the first international investment in the sector.[5] Uptake rose dramatically in this year and continued rising from 28 percent in 2005, and passed 100 percent by 2017
- Fiji—Digicel entered the market in 2008. Mobile use almost doubled in 2007, the year before liberalization, due to the incumbent's preparations for competition.[6] Uptake then continued to rise and passed 100 percent by 2013
- Vanuatu—Digicel entered the market in 2008, when mobile uptake was 16 percent. Just as in many other countries, a major innovation was bringing in a wide range of low-cost handsets, and new services including rollover minutes and free voicemail.[7] Uptake more than quadrupled in the next two years before declining somewhat, possibly because consumers trialed both services and canceled afterward.[8] As of 2025, uptake was 94 percent.
- Samoa—competition with the incumbent SamoaTel began in 2006, when Digicel entered the market. This, and a reform process at SamoaTel,[9] is associated with a near-tripling in mobile subscriptions from 2005 to 2007. With further gains since then, as of 2025, uptake was 85 percent.

FSMTC publishes maps of the four states' wireless access on its website.[10] The maps show good coverage in the main population areas of each state's main islands, but some areas still have no or intermittent service. We lack firm data on the population covered. According to available data, mobile use in the FSM has yet to rise beyond 30 percent.

During 2024, FSMTC commissioned the Rohi Cell Tower, upgraded a tower in Etten, Chuuk, and completed a tower in Nandaku, Pohnpei.

In 2025 and 2026, FSMTC commissioned the following new towers in:

- Paies and Palikir on 8 October 2025 to improve 2G, 3G, and 4G coverage around Palikir, the College of Micronesia, and inner Paies

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[5] Siope Vakataki 'Ofa, 2011, *Telecommunications Regulatory Reform in Small Island Developing States: The Impact of the WTO's Telecommunications Commitment*

[6] *Affordability of mobile services hampered by quasi-monopolies in the Pacific.* Network Strategies, 2013. http://strategies.nzl.com/industry-comment/affordability-of-mobile-services-hampered-by-quasi-monopolies-in-the-pacific/

[7] *Digicel Launches with The Bigger Better Network in Vanuatu* Solomon Times, www.solomontimes.com/news/digicel-launches-with-the-bigger-better-network-in-vanuatu/1998

[8] *Vanuatu - Telecoms, Mobile and Broadband - Market Insights and Statistics* https://www.marketresearch.com/Paul-Budde-Communication-Pty-Ltd-v1533/Vanuatu-Telecoms-Mobile-Broadband-Insights-9015824/

[9] *Samoa's Connected*. 2013. World Bank, https://www.worldbank.org/en/results/2013/04/04/samoa-connected

[10] FSMTC *Wireless Coverage*, accessed 22 June 2022: https://www.fsmtc.fm/wireless/coverage

- Wapar and Madolenihmw on 30 October 2025 to expand network coverage and capacity for the Enipoas, Wapar, and Lohd Pah areas
- Sekere, Sokehs on 5 February 2026.

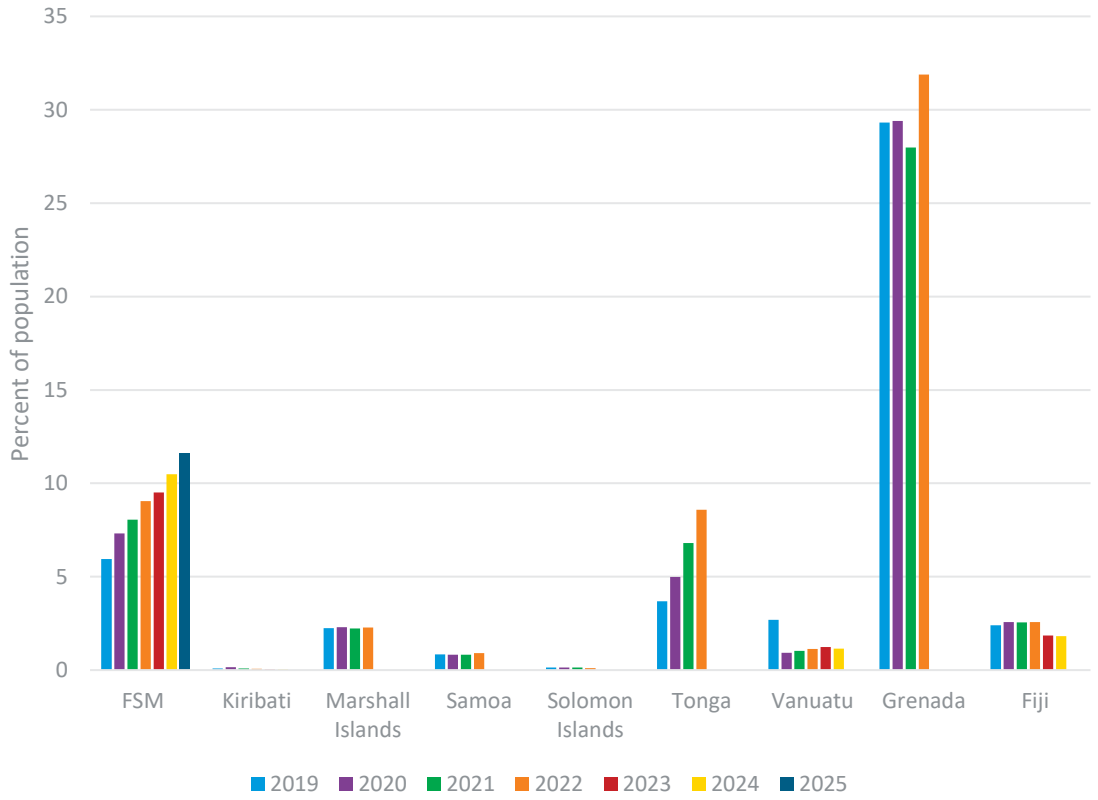
The FSM has the second-highest fixed internet subscription rate, but the FSM's and comparators' rates are very low by global standards

Figure B.4 shows fixed-line internet subscriptions as a percentage of the population from 2019 to 2025. Fixed internet penetration remains low across the Pacific compared with international averages, and only limited comparator data is available after 2022. FSM has recorded slow but steady growth in fixed internet subscription rates since 2019. It now has the second-highest subscription rate among the comparator countries, behind Grenada. After modest growth in 2022 and 2023, subscription growth increased again following the arrival of Starlink services in 2024. This suggests that Starlink is helping to expand the overall fixed internet market rather than just shifting customers between providers.

Further growth is likely in the coming years. Starlink uptake is expected to continue, and CableCorp's open-access FTTP network could support the next stage of fixed-line market development once it becomes operational. A high-quality open-access network would reduce barriers to entry for fixed-line service providers by allowing them to use wholesale fiber access rather than build their own networks. Because the FTTP network is grant-funded, wholesale prices may also be low enough to support retail fiber plans that are both affordable and high quality.

Limited recent data means it is not possible to directly compare FSM's post-2022 growth with that of all comparator countries. However, Grenada provides a useful example of what can be achieved in an island state following an FTTP rollout. Grenada's fixed-line internet subscription rate is significantly higher than any of the Pacific comparators, including FSM.

Figure B.4: Percentage of Residents with Fixed Line Internet Subscriptions



Source: International Telecommunications Union, TRA (2022-2025 for FSM), Population data projected from each country's two most recent censuses

Note: Grenada completed an FTTP rollout in 2019

Prices of Telecommunications Services

We surveyed the advertised prices for mobile bundle (SMS, calling, and data), mobile data, and fixed internet.[11] Details of the plans we used for comparison purposes can be found in Appendix D.

FSM prices for mobile services are high, and not improving compared to comparators

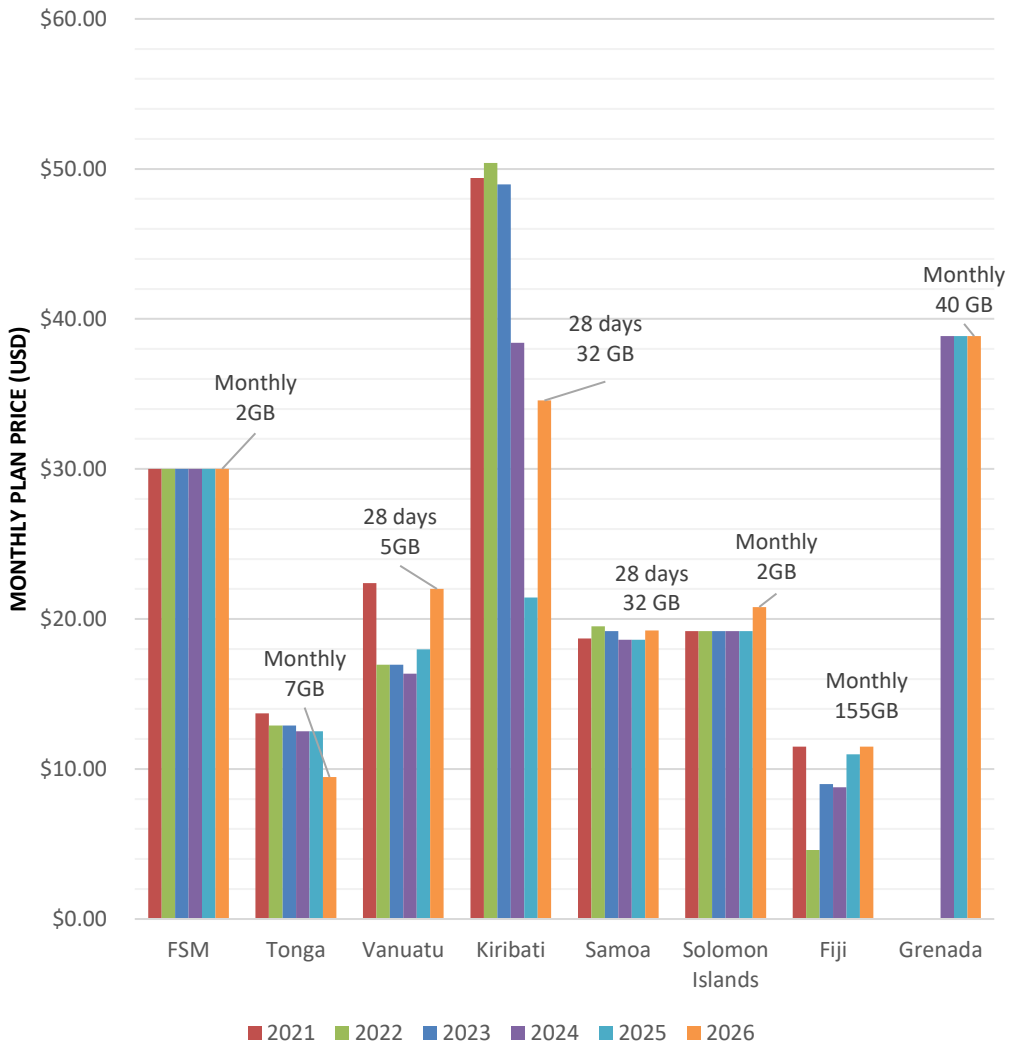
Figure shows the price of basic mobile plans in the FSM, benchmarked against other SIDCs in the Pacific. Mobile phones are increasingly the most important technology for individual consumers—smartphones are progressively getting cheaper and more capable, with internet browsers and downloadable apps. Most consumers—in FSM and elsewhere—want at least some calling, SMS, and internet services for their mobile phones. However, data for internet services is becoming increasingly more important compared to SMS and calling, as consumers can use third-party apps to message and call

[11] Prices were retrieved from the advertised rates on the companies' websites during 30 April 2026

online, without additional charges. Telecommunications firms typically bundle these services into offerings of varying sizes and qualities for consumers. This bundling makes an exact and objective price comparison between companies and countries difficult.

Our approach was to define a minimum standard that a typical consumer could demand and to benchmark the cheapest offering available that meets this standard. This minimum standard is 1GB of Data, 60 minutes of in-country calls, and 250 SMS messages per month—all benchmarked plans exceed this standard in at least one dimension.

Figure B.5: Mobile Monthly Plan Prices—Minimum 1GB Data, 60 Mins Calls, 250 SMS messages



Source: Companies' advertised rates collected on 30 April 2026

Call-outs refer to the 2026 plans and include monthly data limits

Consumers of mobile phone services pay relatively high prices in the FSM, at 30 USD for our standard bundle. Of the comparators, Grenada and Kiribati have higher prices than the FSM. However, the most basic Grenada plan used in the comparison provides 20 times more data than the FSMTC plan, and Kiribati provides 16 times more data than the FSMTC plan. Since our previous report, the prices and services offered in the FSM have not changed. The price of a mobile plan in Kiribati has increased, and prices in other comparator countries have changed immaterially due to movements in exchange rates.

The FSMTC mobile plan has not changed in terms of content and price since our previous report. Over the same timeframe, the price of the cheapest mobile plan offering at least 1GB of data, 60 minutes of calling, and 250 SMS messages remained level across our comparison countries, on average.

The prices for the mobile bundle in Kiribati have increased and include 32GB of data, 1,200 call minutes, and 1,200 SMS. This is a new service offering for Kiribati.

The prices for the mobile bundle in Fiji have increased slightly due to currency rate changes. However, the cheapest bundle now includes 155 GB of data and unlimited calls and SMS, making it the best offering of the compared countries.

The price for the mobile bundle in Vanuatu increased, and the included data has increased to 20 GB per month. The cheapest bundle in Tonga has not changed.

In comparison, FSMTC continues to offer 2GB of data, 60 minutes of calls, and 900 SMS. The lack of change in either price or services offered in FSM compared to comparator countries highlights the need for full-service competition. All other comparator countries with competitive markets have either experienced price decreases or significantly improved the value of services offered for the same or higher price.

FSM prices for mobile data have not reduced in four years, while comparator prices have decreased

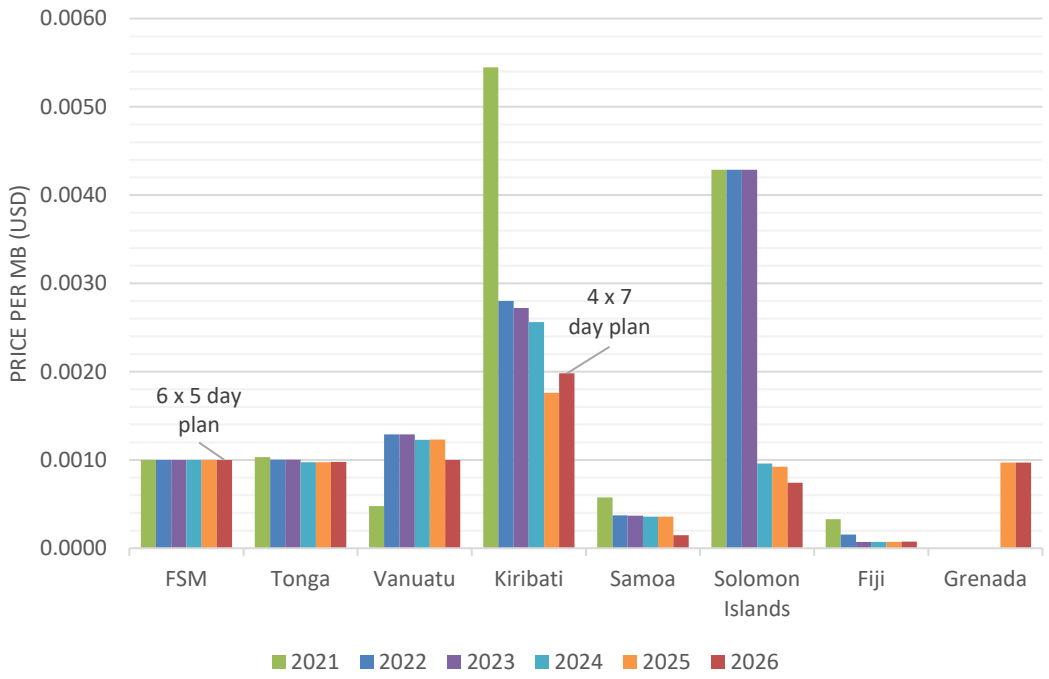
Figure shows the price for a large mobile data-only plan, benchmarked against the FSM's SIDC comparators. Many consumers specifically demand additional mobile data because:

- It may be cheaper to exclusively use mobile data, instead of paying for an additional fixed connection in the home
- Mobile data is convenient if a home does not have an existing copper landline connection, or for travelers and people in temporary accommodation
- In some instances, mobile data provides a superior service compared to the fixed-line internet offerings available.

Our approach here is to determine the cheapest mobile data plan (per MB) in the FSM and benchmark it against our selected comparators. In the FSM, the cheapest offering available is 5GB, valid for 5 days, and priced at 5 USD. Not all countries have the same data allowance or terms. The price of mobile data is therefore calculated as a per-MB for

an approximately equivalent-sized plan over a month: five GB times six, or 30 GB per month.

Figure B.6: Mobile Broadband (Data) Prices Per MB



Source: Companies' advertised rates collected on 30 April 2026

The price of mobile data per MB in the FSM has not changed since we began tracking it six years ago. All Pacific comparators have demonstrated a trend of declining mobile data prices. FSM's rates are similar to those of Tonga, a similarly sized market, at 0.0010 USD for 1 MB. However, the price in the FSM is significantly higher than in Fiji and Samoa. Vanuatu's prices are the same as FSM's, whilst Kiribati's are significantly higher. Following a significant reduction in 2024 and gradual decreases over 2025 and 2026, the price per MB in the Solomon Islands is now lower than in the FSM. We do not expect to see significant improvements in FSM data prices until competition in the mobile market arrives in FSM.

Starlink has significantly changed the fixed internet broadband market by leveling the playing field across countries

Starlink has significantly changed the fixed internet market across the Pacific by making high-speed satellite broadband available at broadly similar prices and service levels across many countries. Among the comparator countries included in this analysis, Grenada is the only country where Starlink is not yet operating, although Starlink is expected to launch there in 2026.

This has helped level the playing field between countries. Historically, fixed internet prices and service quality varied widely across countries, depending on local infrastructure, market structure, and international connectivity. Starlink has changed this comparison by offering a similar service across most Pacific Island countries, with advertised speeds and prices that often compare favorably with existing fixed-line plans.

Figure and Figure B.8 compare fixed internet prices in FSM with those in other small Pacific countries. The patterned columns show Starlink's Residential Lite plan. Starlink is now the cheapest fixed internet option in almost all countries in the sample. Only Fiji and Tonga offer lower-priced plans that meet the benchmark for "superior" fixed internet. In Fiji, customers can access a basic fiber plan for US$7.28 per month. However, it offers a slower advertised speed of 20Mbps and a 75GB data cap, compared with Starlink Residential Lite's advertised speeds of 50 to 100Mbps and unlimited data. Tonga's lower-priced plan is an ADSL service with much slower advertised speeds.

Starlink's advantage is that it can enter new markets quickly without needing to build a full local fixed-line access network. This creates competitive pressure for incumbent fixed internet providers. In areas where fixed-line networks are practical, providers may need to upgrade to higher-speed, lower-latency fiber services to retain customers and compete effectively with Starlink.

Fixed internet is important for applications that require high speed and low latency. It is used in businesses and public services, such as health and education. Different fixed internet products control broadband use through different methods. In other words, customers may choose their fixed internet broadband plan based on a trade-off between speed and/or data cap amount, and price.

In the FSM, fixed-line broadband is sold based on connection speed; actual data usage is not limited. In some of the other Pacific countries, fixed-line broadband plans are categorized by data amount (data cap), speed of connection in Megabits per second (Mbps), or both, such as speeds with 'fair use' data caps during peak use times.

The variety of options makes it difficult to compare prices for the same service. We have therefore identified two minimum service level products that are available across the sample:

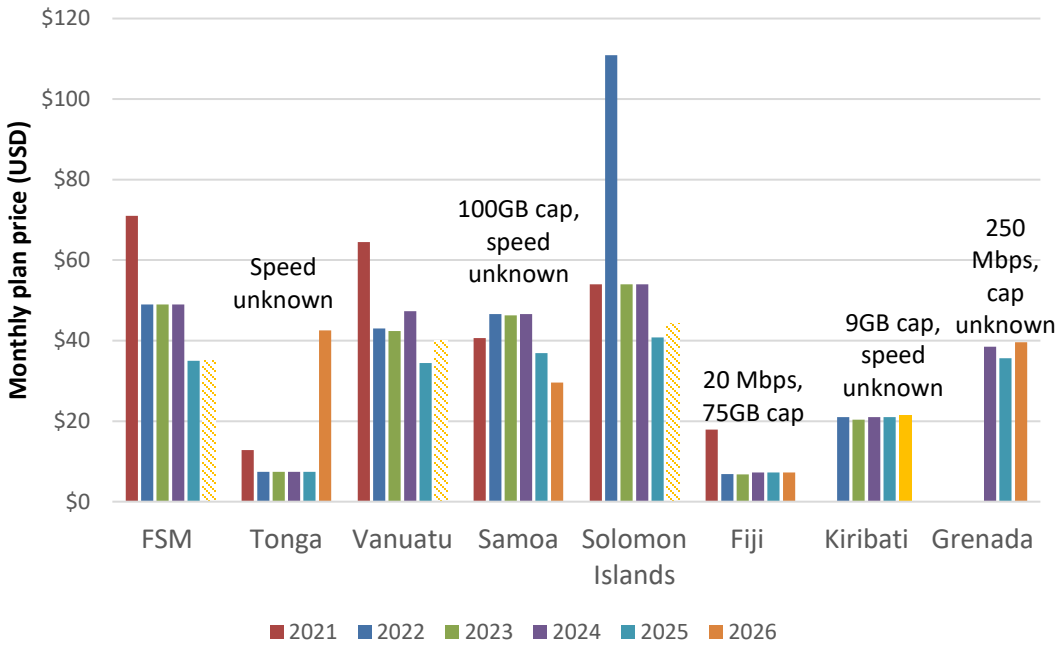
- 'Basic' fixed line broadband—the cheapest plan of at least 1.5Mbps (analyzed in Figure), or
- 'Superior' fixed line broadband— the cheapest plan with at least a 50GB data cap and 4 Mbps connection download speeds (analyzed in Figure B.8).

We determined the prices and speeds of both basic and superior fixed-line broadband in the FSM and benchmarked them against other small Pacific countries.

These benchmarks provide a consistent basis for comparing prices, but they do not capture every difference in service quality. The limiting factor for a plan still matters. For some customers, a data cap may be the main constraint. For others, speed may be more important. Figure B.7 and Figure B.8, therefore, identify the main limiting factor for each

plan, where relevant, so that price differences can be understood alongside the service limitations associated with each offer.

Figure B.7: 'Basic' Fixed Line Broadband Prices



Source: Companies' advertised rates collected on 30 April 2026

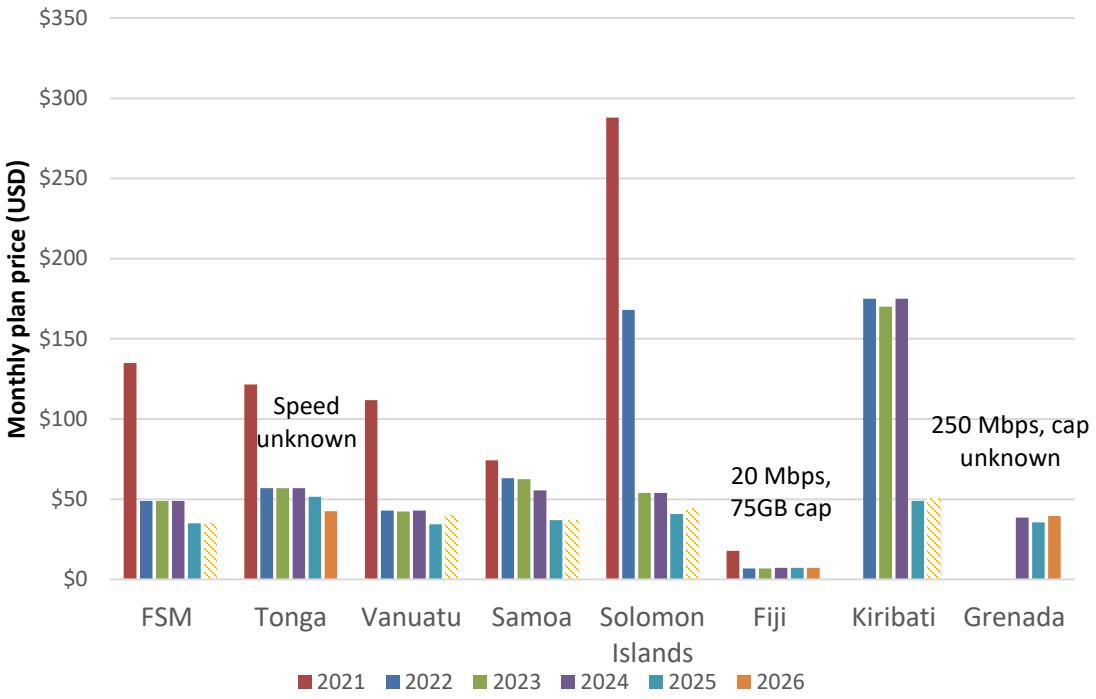
Notes: 1. Starlink Residential Lite in FSM, Vanuatu, and the Solomon Islands meets the requirements of both a basic and a superior. Fiji's cheapest plan also met the superior service criteria. Therefore, the prices are the same across both service levels.

2. Kiribati did not have a fixed internet option before Starlink, so we use a 4G fixed wireless internet service.

3. The striped pattern symbolizes Starlink's Residential Lite plan.

4. Data labels refer to 2026 plans

Figure B.8: 'Superior' Fixed Line Broadband Prices



Source: Companies' advertised rates collected on 30 April 2026.

Note: 1. Kiribati did not have a fixed internet option before Starlink, so we use a 4G fixed wireless internet service.

2. The 2023 decrease in price for the Solomon Islands was due to an increase in speeds to an existing plan, which now qualifies it as a premium service.

3. The striped pattern symbolizes Starlink's residential Lite plan.

4. Data labels refer to 2026 plans.

Starlink has levelled the playing field for fixed internet across Pacific Island countries. As an early adopter of Starlink, FSM has the cheapest Residential Lite price, at USD 35. The Starlink Residential Lite plans in other countries are similarly priced, between USD 35 and 45 per month, with slight fluctuations due to exchange rates. Fiji's TFL basic fiber service remains the cheapest plan in the analysis. But with speeds up to 20Mbps and a 75GB data cap, it provides an acceptable basic, but inferior service, to the 50 to 100Mbps and unlimited data provided by Starlink's Residential Lite plan.

FSMTC's Kaboom fiber services are also more expensive and offer a slower advertised speed than Starlink's Residential Lite plan. The cheapest Kaboom plan (Kaboom Bronze) costs USD 49 per month for a 10Mbps download speed. Providers of fiber internet, such as FSMTC, may need to urgently reassess their plans to compete with Starlink.

Of the countries surveyed, Starlink was only unavailable in Grenada. It also operates in Fiji and offers its Residential Lite plan there, and it operates in Tonga, but did not offer the Residential Lite plan at the time of writing.

Appendix C: Comparing Telecommunications Services in FSM, the Marshall Islands (RMI), and Palau

This section provides a regional comparison of telecommunications services in FSM, RMI, and Palau. We do not include Palau and RMI in the broader benchmarking analysis because differences in population size, geography, and income levels make them less suitable comparators for FSM. However, the three countries have similar cultural identities and many common characteristics as small Micronesian island nations, so we provide a separate comparison here to give additional regional context.

The comparison should be read as contextual rather than as a direct benchmark. FSM is larger than both RMI and Palau, with a population of around 75,000 people, compared with around 38,000 people in RMI and around 18,000 people in Palau. In each country, one provider remains the main full-service operator, offering the broadest combination of mobile and fixed internet services. However, competition exists around the edges of these markets, particularly in specific services, technologies, or locations.

In FSM, FSMTC remains the main full-service provider and the only nationwide mobile operator, while Starlink and other satellite services provide competition in fixed internet. In RMI, the National Telecommunications Authority (NTA) is the main full-service provider, offering both mobile and internet services, while Starlink also provides competition in fixed internet. In Palau, the Palau National Communications Corporation (PNCC) is the main full-service provider of mobile and internet services. Palau Mobile Communications Inc. (PMCI) offers some mobile and fixed internet services, while Palau Telecoms provides limited fixed internet options. Unlike FSM and RMI, Starlink does not currently play the same competitive role in Palau's fixed internet market. The Palau Government introduced a moratorium in 2023 that restricted Starlink's entry, reflecting concerns that it could affect state-owned telecommunications companies that had invested in major submarine cable projects and were still repaying government-backed loans.[12]

This market context is important when interpreting service outcomes. A smaller market size can make telecommunications competition more difficult, but it does not fully explain the level of competition seen in each country. Palau, despite having a much smaller population than FSM, has some competition in both fixed internet and mobile services, including a second mobile operator. FSM, by contrast, still has only one nationwide mobile provider.

The three countries primarily rely on submarine fiber-optic cables for international connectivity. Recent World Bank-supported investments across the region have focused on improving cable resilience, expanding domestic fiber networks, and enabling more competitive service delivery through regulatory reform, particularly in FSM and RMI.

[12] Island Times Palau (2026), Allowing Starlink Now Risks $50M Debt Burden on Palau, available at: https://islandtimes.org/whipps-allowing-starlink-now-risks-50m-debt-burden-on-palau/

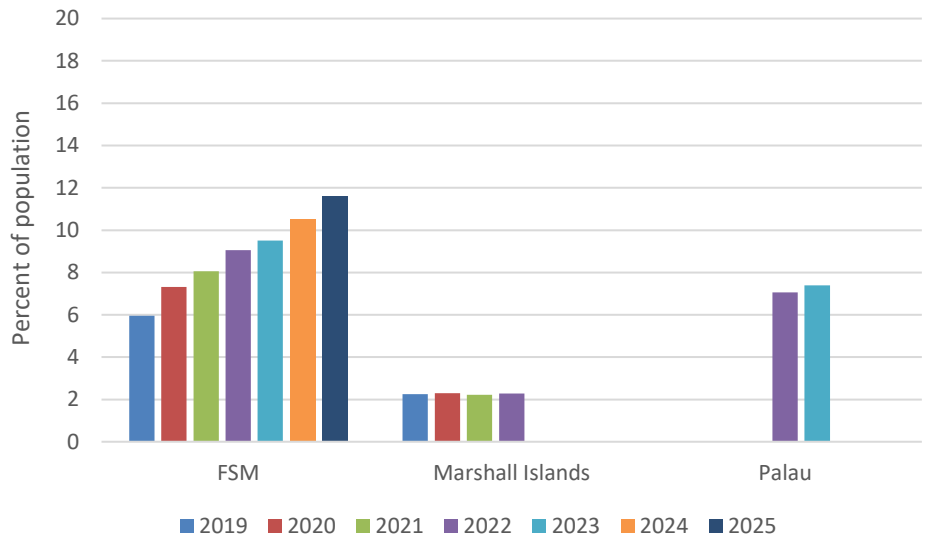
Access to telecommunications services

We examine fixed internet, internet, and mobile penetration in RMI, Palau, and FSM.

Fixed internet penetration

Fixed internet penetration is difficult to compare between the three countries due to a lack of consistent public data. 2022 is the last year for which data is available for all three countries. In 2022, FSM (9 percent) was slightly ahead of Palau (7.3 percent) in fixed internet penetration and had a much higher rate than RMI (2.3 percent). Since then, FSM has steadily expanded its fixed internet penetration, reaching 11.6 percent in 2025, primarily through the rollout of FSMTC's fiber network and growth in satellite services. The available data suggests that fixed internet penetration in Palau is also increasing, but no data is available after 2023. No further data is available for RMI.

Figure C.1: Fixed internet penetration



Mobile penetration

FSM's estimated mobile penetration is 47.9 percent in 2025. This remains well below Palau, which recorded 144 percent mobile penetration, and is broadly similar to RMI which recorded 48.5 percent in 2022 (the latest year for which reliable data is available).These figures should be interpreted carefully. Mobile penetration measures active subscriptions, not unique mobile users. A penetration rate above 100 percent, such as in Palau, can reflect people holding more than one mobile subscription, business subscriptions, visitor use, or other factors. Similar factors may apply to FSM and RMI's penetration rates. Even with this, the difference between FSM and Palau is significant, indicating that mobile services are much more widely used in Palau than in FSM.

Mobile penetration in Palau has historically been much higher than in FSM and has remained steady since 2019. RMI's mobile penetration is similar to FSMs, although the

lack of recent data makes it difficult to assess whether this gap has changed in recent years.

FSM's low mobile penetration compared with Palau reinforces the need for a more focused effort to develop the mobile sector. Like FSM, Palau and RMI are small North Pacific Island countries with one main mobile service provider. However, Palau also has some mobile competition through Palau Mobile, while RMI continues to have one mobile provider. The comparison suggests that small market size and island geography do not fully explain FSM's low mobile penetration.

Several factors may help explain FSM's lower take-up. Mobile network upgrades, including 3G and 4G rollout, occurred later in FSM than in many other markets. Mobile prices are also high relative to international and regional benchmarks, while entry-level mobile plans offer limited data compared with many Pacific peers. Together, these factors may reduce the perceived value of mobile services for some consumers, particularly households that rely more heavily on fixed internet, Wi-Fi, or shared access.

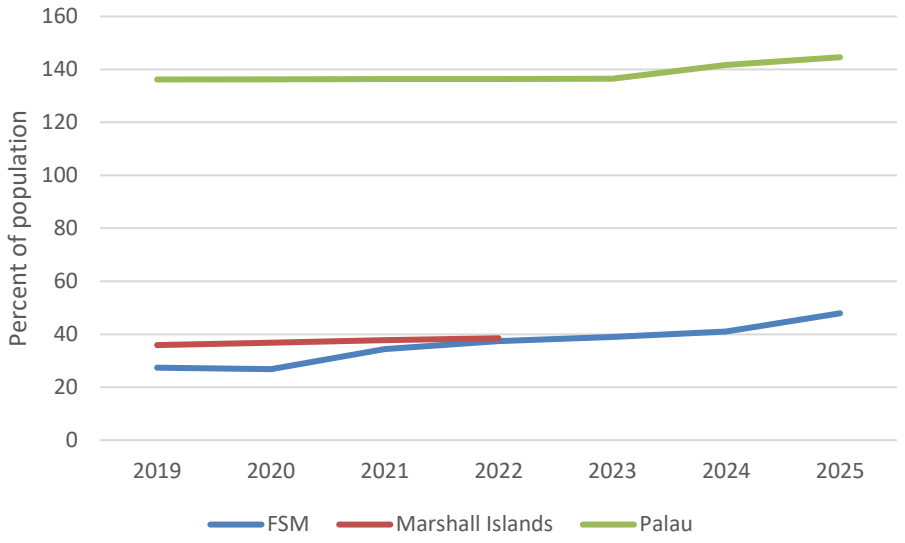
Palau's higher mobile penetration may reflect a stronger role for mobile services as a primary means of connectivity. Palau has a much smaller and more concentrated population, as well as significantly higher GNI per capita, which may make mobile network deployment and consumer take-up easier. Palau also has significantly higher tourism levels per capita than FSM and RMI, which may affect mobile penetration data. Tourists often buy short-term SIM cards for local data, leading to more active SIM cards in a given period. Over 65,000 tourists visited Palau in 2025,[13] equivalent to almost 370 percent of its population size, and much higher than tourism levels in FSM (18,000 tourists or roughly 16 percent of the population size)[14] and RMI (10,700 tourists, or roughly 29 percent of the population size)[15]. These differences mean Palau is not a direct benchmark for FSM, but the comparison still shows that materially higher mobile penetration is possible in small North Pacific markets.

[13] Palau Visitor Arrivals: https://www.palaugov.pw/executive-branch/ministries/finance/budgetandplanning/immigration-tourism-statistics/

[14] The FSM Statistics Division reported 18,000 tourist arrivals in 2019, more recent data is not available. https://stats.gov.fm/topics/social/international-visitors-arrival/

[15] RMI Office of Commerce, Investment & Tourism reported 10,700 tourist arrivals in 2025. https://www.ocit.mh/tourism

Figure C.2: Mobile penetration



RMI and Palau data are sourced from the World Bank. No reliable data on RMI has been published since 2022.

Individuals using the internet

Individuals using the internet is a measure of total internet subscribers, comprising both fixed and mobile internet users, while avoiding double-counting.

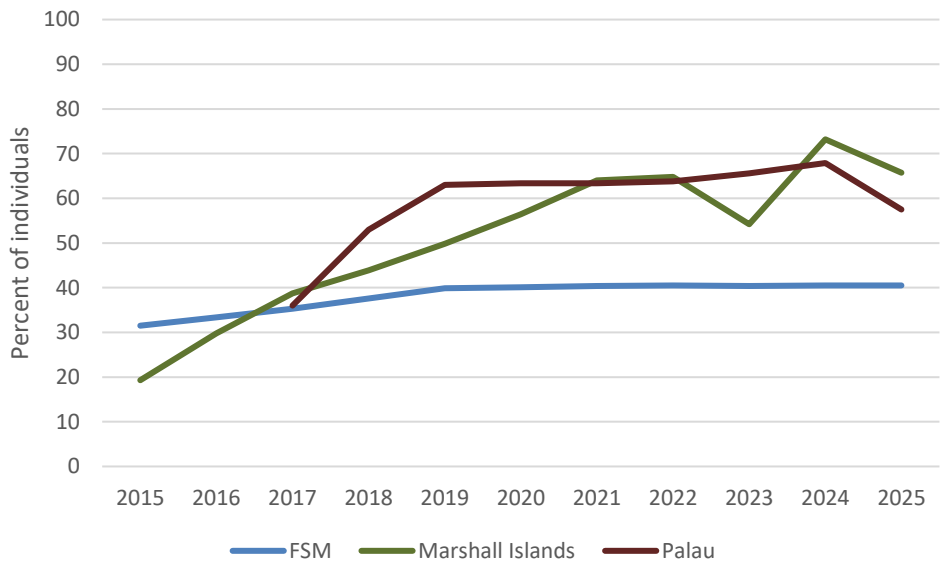
Internet use in FSM has remained largely unchanged since 2019, following steady increases from 2015. In 2025, 40.5 percent of the population used the internet, up from 31.5 percent in 2015. In RMI, 65.7 percent of the population used the internet in 2025, a significant increase from 19.3 percent in 2015. In Palau, 57.5 percent of the population used the internet in 2025, up from 36 percent in 2017.

All three countries have received significant investment from development partners and governments to improve connectivity, particularly through submarine cable infrastructure and broadband expansion programs. The investment each country received includes:

- **FSM**: received funding for the East Micronesia Cable (EMC) and World Bank funding for the FSM Connectivity Project, aimed at expanding affordable and reliable broadband access
- **Palau**: received submarine cable investments, including the U.S.-backed high-capacity fiber-optic link connecting Palau to regional networks via Guam and trans-Pacific cable systems
- **RMI**: received World Bank funding aimed at expanding affordable broadband access and improving digital service delivery across all inhabited atolls.

While all three countries have received investment, FSM stands out by continuing to have relatively limited growth in overall internet use. This may increase in the coming years, when CableCorp's open-access fiber network is completed.

Figure C.3: Individuals using the internet



Prices of Telecommunications Services

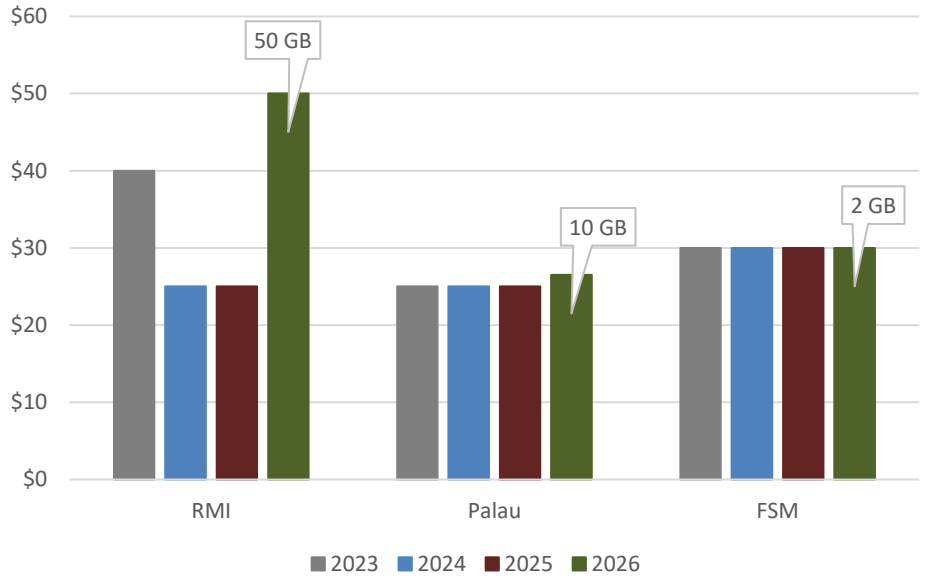
We surveyed the advertised prices for mobile bundle (SMS, calling, and data), mobile data, and fixed internet plans.

FSM's mobile services prices are the same as Palau's and less than RMI's

FSM and Palau's basic mobile plans are US$30 per month. FSM's entry-level plan includes 2 GB of data, 60 minutes, and 900 SMS, while PNCC in Palau offers 10GB of data, 190 minutes, and 2000 local texts.

Mobile prices increased significantly in the Marshall Islands between 2025 and 2026, as it appears that NTA introduced a new suite of plans in 2026. This follows a decrease in mobile plan prices in 2024 for better offerings. The price of NTA's cheapest qualifying plan increased from US$25 in 2025 to US$50 per month. The new plan provides double the data, offering 50 GB and unlimited calls and texts. Mobile plan prices and offerings have remained the same in FSM since 2023; Palau's mobile plan prices increased slightly in 2026.

Figure C.4: Mobile plan prices 2023-2026



Call-outs refer to the number of gigabytes of data offered in the 2026 plans

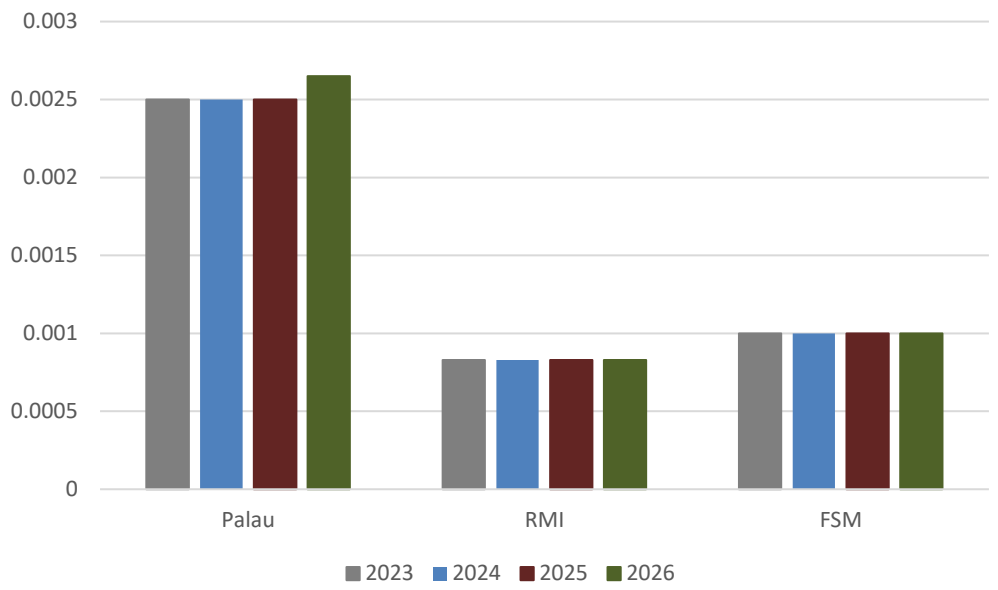
Mobile data prices

The cost of mobile data differs across the three countries. In 2026, RMI offered the lowest mobile data cost per megabyte. NTA in RMI offers 20 GB of data for US$16.60, which is equivalent to approximately US$0.00083 per MB. FSM's closest equivalent package costs US$30 and provides 30 GB of data across multiple short-duration plans, at about US$0.001 per MB.

Palau had the highest mobile data prices. PNCC's 10 GB package costs US$26.50, or around US$0.00265 per MB. This means mobile data in Palau costs more than twice as much per megabyte as in FSM and more than three times as much as in RMI.

Mobile data prices have remained mostly stable since 2023 across FSM, RMI, and Palau. PNCC increased the price of its 10 GB mobile data plan slightly in 2026 without changing the amount of data included.

Figure C.5: Mobile data prices 2023-2026



Fixed Broadband Services

Fixed broadband prices have remained largely unchanged since 2024, with the exception of the introduction of Starlink Residential Lite plans in FSM and RMI. In FSM, FSMTC's fiber plan costs US$49 per month and provides advertised download speeds of 10 Mbps. Starlink introduced its Residential Lite service in FSM in 2025, offering speeds of around 50 Mbps for US$35 per month.

In Palau, PNCC's 10 Mbps fixed broadband plan costs US$63.61 per month, with no change in pricing or offerings since 2023.

In RMI, NTA's 10 Mbps DSL service costs US$49.95 per month and has also remained unchanged since 2023. Starlink became available in the Marshall Islands in 2025 and introduced its Residential Lite plan, offering speeds of around 50 Mbps for US$75 per month.

Table C.6: Fixed Broadband prices 2026

Country	Provider	Price (USD)	Advertised download speed	Change since 2023
FSM	Starlink	$35	50 Mbps	New plan
	FSMTC	$49	10 Mbps	No
Palau	PNCC	$63.61	10 Mbps	No
RMI	NTA	$49.95	10 Mbps	No
	Starlink	$75	50 Mbps	New plan

Appendix D: Advertised Plans Used for Mobile Services Comparisons

Table D.1: Mobile Plan Prices

Country	Provider	Monthly prepaid plan (bundle - data, voice, and SMS) unless stated otherwise	Price (in local currency)	Currency Converter	Price adjusted to USD
FSM	FSMTC	Monthly 30: 2GB, 60 mins, 900SMS	$30	$1.00	$30.00
Tonga	Tonga Communications Corporation Ltd	Oukka Plans 7GB Data 150 SMS 150 Minutes	$22	$0.43	$9.46
Vanuatu	Digicel (Vanuatu) Ltd	4 x 7-day 4G AIO plan: total 5GB, 3200 mins, 6000 SMS (mins and sms to Digicel only)	$2,200	$0.01	$22.00
Kiribati	Oceanlink	Weekly: 8GB data 300 mins 300 SMS	$48.00	$0.72	$34.56
Samoa	Digicel (Samoa) Ltd	4 x Prime Cheehoo 7-day $13. Weekly: 8GB any use, unlimited calls and SMS (Digicel to Digicel), unlimited off-net calls, 30 int'l mins calls	$52	$0.37	$19.24
Solomon Islands	Bmobile-Vodafone	Moa month (30 days): 400mins	$160	$0.13	$ 20.80

		offnet, 1000SMS, 2GB, free calls on-net			
Fiji	Digicel	30 Day Fj25: 155GB + unlimited calls and SMS 100 mins on other mobile networks	$25	$0.46	$11.50
Grenada	Flow	30 Day Plan - 40GB + unlimited local SMS, SWIFT messaging, and Whatsapp Full + unlimited calls	$105	$0.37	$38.85

Table D.2: Mobile Data Prices

Country	Provider	No. of Megabytes in plan, based on the cheapest plan	Price in local currency	Price per MB - based on monthly plan	USD/Local Currency	Plan price in USD for one month	Price per MB adjusted to USD
FSM	FSM Telecom	Only valid for 5 days - 5000 (x6)	5 (x6)	0.001	1.00	$ 30.00	$ 0.001000
Tonga	Digicel Tonga Ltd - weekly plan	22000	50	0.0023	0.43	$ 21.50	$ 0.000977
Vanuatu	Digicel (Vanuatu) and Telecom Vodafone Ltd	24000	2400	0.1	0.01	$ 24.00	$ 0.001000
Kiribati	Vodafone Kiribati	7-day weekly plan - 4000 (x4)	11 (x4)	0.0028	0.72	$ 31.68	$ 0.00198
Samoa	Vodafone Samoa (BlueSky)	150000	60	0.0004	0.37	$ 22.20	$ 0.000148
Solomon Islands	Solomon Telecom / Our Telekom	35000	200	0.0057	0.13	$ 26.00	$ 0.000743
Fiji	Digicel	150000	25	0.0002	0.46	$ 11.500	$ 0.000077
Grenada	Flow	40000	105	0.0026	0.37	$ 38.85	$ 0.000971

Table D.3: Fixed Internet Prices

Country	Provider	Basic or Superior plan[16]	Monthly plan (cheapest option) - pre-paid	Price (in local currency)	USD/Local Currency	Price	Max Speed (for downloads)
FSM	Starlink	Basic and Superior	Starlink Residential Lite	35	1	35	50-100 Mbps
Fiji	TFL	Basic and Superior	75GB, Up to 20 Mbps,	15.83	0.460	7.2818	20 Mbps
Samoa	Starlink	Basic and Superior	Starlink Residential Lite	99	0.373	36.927	50-100 Mbps
Solomon Islands	Starlink	Basic	Starlink Residential Lite	340	0.120	40.8	50-100 Mbps
	Digicel Samoa	Superior	Moata $80. 100GB	80	0.37	29.6	Unclear

[16] 'Basic' fixed line broadband plan—the cheapest plan of at least 1.5Mbps

'Superior' fixed line broadband plan— the cheapest plan with at least a 50GB data cap and 4 Mbps connection download speeds

Country	Provider	Basic or Superior plan[16]	Monthly plan (cheapest option) - pre-paid	Price (in local currency)	USD/Local Currency	Price	Max Speed (for downloads)
Tonga	Tonga Communications Corporation Ltd	Basic	ADSL Unlimited Plan	99	0.43	42.57	Unclear
	Starlink	Superior	Starlink Residential	120	0.430	51.60	Unclear
Vanuatu	Starlink	Basic and Superior	Starlink Residential Lite	4000	0.010	40	50-100 Mbps
Kiribati	Vodafone Kiribati	Basic	9 GB Prepaid "Normal Plan"	30	0.720	21.6	Unclear
	Starlink	Superior	Starlink residential lite	70	0.720	50.4	50-100Mbps
Grenada	Flow	Basic and Superior	Link Up 250	107	0.370	39.59	250 Mbps

Appendix E: TRA work history

Here we provide further details on outputs completed in previous financial years.

Promulgating Rules

In 2019, the TRA developed the Rules for an open and competitive market. After consultations with affected parties and under the Administrative Procedures Act (APA) process, the following Rules were brought into law in October 2019:

- Telecommunications Operating License Rules
- Spectrum License Rules
- Interconnection and Access Rules
- Schedule of Fees Rules
- National Numbering Plan.

Granting licenses

In 2019, TRA issued licenses to FSMTC and Cable Corporation to continue providing telecommunications services in the FSM. In the year ending 30 September 2020, TRA issued licenses to Boom! Inc., Kacific Broadband Satellite(s) International Ltd, and MCS Pohnpei Inc. In the year ending 30 September 2021, TRA issued licenses to Chuuk Public Utility Corporation (CPUC) and Pacific Satellite & Telecommunications Corporation. In early 2024, TRA issued licenses to iSolutions, Starlink, and FSM Tech. We also amended iBoom's license to allow for the provision of mobile voice services.

In December 2023, the TRA granted iBoom a 6-month Special Temporary Frequency License to test a Mobile Cellular Network in the 1800Mhz band. In February 2024, the TRA granted iBoom a Mobile Cellular License for the same spectrum.

Establishing a reporting framework for the FSM telecommunications market to collect data on sector performance

In 2019, the TRA developed a set of proposed information metrics and indicators that it now collects and monitors. In 2020, the TRA undertook a consultation with licensed operators, interested parties, and the public on the data reporting framework by licensed operators. In 2021, following consultation, the TRA implemented the reporting framework for the FSM telecommunications market and began collecting important data on sector performance. In 2023, the TRA continued to collect data on sector performance and worked closely with licensees to develop a culture of compliance and to ensure all data was provided accurately and in a timely way.

Strengthening Institutional Outputs

In 2020, TRA introduced new ways to improve its internal operations. These include an operational manual to guide staff on the TRA's core regulatory activities, staff training in the use of its operations manual, a TRA key objectives traffic light reporting system for Board meetings, and a forward resourcing assessment.

Establishing awareness of the TRA in the community

In 2020, the TRA contracted Pasifika Communications to undertake awareness-raising for the regulatory reforms and potential new investments across the four states. TRA also promoted its rule-making work through radio and newspaper advertisements.

Bottleneck Facility Determination

In 2021, the TRA commenced a process to consider whether certain types of fiber cables and associated equipment should be declared bottleneck facilities. In 2023, the TRA finished consultation on and published the Bottleneck Facility determination. The determination ruled that all submarine fiber-optic cable facilities and all FTTP network facilities that were built by 9 May 2022 (the date of the decision) are bottleneck facilities. The determination is an important step towards testing whether, and, if necessary, helping ensure that a level playing field exists for licensees relying on fiber assets to provide retail telecommunication services to end users.

Involvement in telecommunication disputes

The TRA has been involved in resolving telecommunication disputes, including three complaints made during previous financial years:

- The Cable Corporation filed a dispute about access to the Yap Cable Landing Station
- The Cable Corporation filed a dispute about whether FSMTC's HANTRU-1 upgrade falls under Section 342 of the Act
- FSMTC filed a dispute that the Cable Corporation was unfairly colluding with iBoom.

Enhancing spectrum capability

The TRA has enhanced its spectrum capability by hiring an external spectrum advisor and a local spectrum support staff member. On 29 March 2021, AnS was appointed as the TRA's external spectrum adviser. On 28 June 2021, the TRA hired an in-house Spectrum Officer. In July 2021, the TRA commenced procurement of a spectrum analyzer, completing the procurement in February 2022. The spectrum analyzer allows the TRA to determine occupied spectrum and track interference sources.

Amended Interconnection and Access Rules

On 26 July 2022, the TRA released an amended version of the Interconnection and Access Rules, 2019, following the APA process. The Interconnection and Access Rules, 2019 set out the processes, mechanisms, and rules for interconnection and access agreements and disputes between licensees. We amended the Interconnection and Access Rules to align with the recently finalized Bottleneck Facility determination.

Starlink trial and licensing

In May 2022, representatives of the SpaceX satellite internet program, Starlink, contacted the TRA to express interest in providing satellite internet services in FSM. The TRA responded to SpaceX on 11 May 2022 with an outline of the steps required

to obtain an Operating License. Following the testing period, Starlink applied for and was granted an Individual Operating License in March 2024.

Online consumer survey

In April 2023, the TRA procured its first online consumer survey. Pasifika Communications ran the FSM Digital Connectivity Survey for approximately five weeks and received 752 unique submissions. The results were important for the TRA to get a better understanding of the market. The TRA thanks those who participated and looks forward to engaging with consumers on a wider scale in future engagements.

Workshops to improve the performance of the sector

In April 2023, the TRA (supported by its international consulting team) held workshops with three groups of telecommunications stakeholders: telecommunications operators, members of the public, and officials from the Department of Transportation, Communications, and Infrastructure. The workshops allowed the TRA to share important market updates with key stakeholders and gain a better understanding of industry problems and concerns. They also provided an opportunity to discuss, in person, ways for stakeholders and the TRA to work together to improve the performance and efficiency of the communications sector and produce better outcomes for consumers.

Recommendation to remove section 342 from the Act

Section 342 of the Act requires licensees to publish their plans to expand their telecommunications networks and invite others to share them. While this could, in principle, lead to greater infrastructure sharing, there is little evidence that it has done so. Rather, it appears to delay the construction and improvement of the telecommunications network. The TRA has recommended to the FSM Government that it be removed from the Act.

Website update and publishing of market data

The website uses market data from the operators' quarterly reports. In July 2024, the TRA commenced a consultation process to inform licensees of our intent to publish the data. No issues were raised during the consultation process. The TRA proceeded to create new web pages to help consumers understand the market and the services available to them, and to provide service providers, potential new entrants, and other sector stakeholders with up-to-date information about the FSM telecommunications market.

Engagement with National and Pohnpei Governments on the State of the Market

In April 2024, the TRA (supported by its advisers) briefed the Vice President on the latest national and regional telecommunications market developments and their potential implications on national government policy. The TRA also paid a courtesy visit to the Governor of the State of Pohnpei to discuss market developments.

Appendix F: List of defined terms

ADSL	Asymmetric Digital Subscriber Line
APA	Administrative Procedures Act
ARPU	Average Revenue Per Uni
Cable Corporation	FSM Telecommunications Cable Corporation, a.k.a. Open Access Entity
CPUC	Chuuk Public Utility Corporation
DSL	Digital Subscriber Line
FSM	Federated States of Micronesia
FSMTC	Federated States of Micronesia Telecommunications Corporation
FTTP	Fiber to the Premise
FY	Financial Year
GB	Gigabyte
GDP	Gross Domestic Product
GNI	Gross National Income
ISP	Independent Service Provider
ITU	International Telecommunication Union
MB	Megabyte
Mbps	Megabits per second
Mhz	Megahertz
RMI	Republic of the Marshall Islands
SIDC	Small Island Developing Countries
SMS	Short Message Service
TRA	Telecommunications Regulatory Authority
USD	United States Dollar
VDSL	Very High Bitrate Digital Subscriber Line

Appendix G: Annual Telecommunication Regulation Authority Report 2025

ANNUAL TELECOMMUNICATION REGULATION AUTHORITY REPORT 2025

This annual report covers the financial year ending 30 September 2025.

Purpose of this report

This report is released under section 319 of the FSM Telecommunications Act of 2014. Section 319 requires the TRA to produce an annual report on its activities for the previous financial year. The purpose of this report is to provide an update on the general activities of the TRA.

Introduction

1 The Telecommunication Regulation Authority (the TRA) is an independent regulator and became operational in October 2018. We set the rules for telecommunications service providers in the Federated States of Micronesia (FSM). We are also tasked with enforcing those rules.

2 It is our mission to develop telecommunications in a competitive environment for the benefit and interest of all the citizens of the FSM. We were created and operate under the FSM Telecommunications Act of 2014 (the Act). The Act provides for up to three Board members for the TRA. The President appoints our Board members with the advice and consent of Congress. We currently have two Board members who collectively decide the TRA's actions. One board member was appointed in 2018. The second board member was appointed in June 2023.

3 Our aim is to ensure all people in the FSM have access to good quality internet, phones, and other telecommunication services. Our goal is to create a competitive environment that enables telecommunications to be a key driver of economic and social growth for the FSM. To achieve this goal, we set rules that require all firms to have a license to provide their services, facilitate competition between telecommunications services, promote efficient investment, require firms to clearly communicate to customers their terms and prices, require firms to provide a consumer complaint process, and, if necessary, make rules on prices to ensure dominant firms are not charging prices we consider to be inappropriate.

4 This Annual Report sets out the following for the year ending 30 September 2025:

- A summary of TRA activities during the 2025 financial year
- A list of the licenses issued under the Act and in force as at 30 September 2025
- A list of the interconnection and access agreements in force as at 30 September 2025
- A summary of any material litigation involving the TRA; and
- A description of the activities carried out during the year in respect of the universal access plan.

Summary of TRA's activities in FY2025

5 This section summarizes the TRA's activities for the year ending 30 September 2025.

[c-i-c [redacted]]

Redesigning spectrum policy

6 In April 2024, the TRA started to explore the need for a redesigned spectrum policy.

7 With iBoom entering the cellular mobile market, the TRA wanted to ensure that its spectrum policy provided maximum benefit for consumers by balancing the needs of current operators and protecting sufficient spectrum for future new entrants.

8 On 27 December 2024, the TRA published a consultation paper on "Proposed Cellular Mobile Spectrum Aggregation" to get feedback on the proposed aggregated mobile cellular spectrum.

9 Only one party, Kacific Broadband Satellites International Inc. (Kacific), responded.

10 Following feedback, on 27 February 2025, the TRA issued the draft decision on "Proposed Cellular Mobile Spectrum Aggregation Limits." The revised policy ensures that FSM's telecommunications market will be able to support at least three nationwide mobile operators.

11 No comments on the draft decision were received by the 14 March 2025 deadline.

12 On 28 March 2025, the TRA published the final decisions on "Cellular Mobile Spectrum Aggregation Limits," setting out our decision that, in light of the absence of comments, no changes from the draft decision are required to the proposed cellular mobile spectrum aggregation limits policy.

13 This matter is considered resolved.

Responding to inquiries by new entrants

14 In April 2025, the TRA created a market information pack for potential new entrants to support competition in the FSM telecommunications market.

15 In June 2025, a small regional telecommunications operator contacted the TRA seeking information about entering the FSM market. The TRA responded with a letter welcoming further discussions and provided a market information pack to the operator's Board.

16 Progress on responding to inquiries by new entrants continued into the next financial year.

Complaints procedures

17 The TRA reviewed and audited the consumer complaints procedures of telecommunications service providers in the FSM and identified that some operators had inadequate complaints processes in place.

18 On 25 October 2024, the TRA sent letters to operators outlining the issues identified and plans to begin the APA process to amend the Rules to better align with the TRA Act, including requirements to publish and distribute the complaints process information.

19 In November 2024, all operators except for FSMTC responded to the TRA's letters, outlining their current complaints and dispute-handling procedures. Where needed, TRA sent follow-up letters asking for further information.

Involvement in telecommunication disputes

20 One complaint was made to the TRA during the year to 30 September 2024 and resolved during the year to 30 September 2025:

- iBoom filed a complaint that FSMTC was not meeting its obligations under the Act to respond to requests for interconnection and access within an appropriate timeframe.

21 Further details of the telecommunications dispute, the TRA's actions, and any resolutions are detailed below.

iBoom complaint regarding interconnection and access agreements

22 On 9 January 2024, the TRA was copied into an email from iBoom to FSMTC requesting interconnection with FSMTC's mobile network and access to FSMTC's dark fiber in Yap.

23 iBoom's request included access to 6-8 strands of dark fiber owned by FSMTC. By using FSMTC's spare fiber, iBoom can avoid unnecessary duplication of infrastructure, which would only increase costs to be recovered from consumers.

24 iBoom also requested interconnection with FSMTC's mobile network, allowing iBoom's mobile customers to call FSMTC customers through a local connection, rather than over international networks.

25 The TRA considers iBoom's email to FSMTC on 9 January 2024 to be a formal request for access. Additionally, iBoom claims to have made multiple requests for access since 2019/2020. However, according to the correspondence we have seen, there does not appear to be a clear request for access that meets the requirements of the Act prior to 9 January 2024.

26 On 5 February 2024, iBoom sent another email to FSMTC, restating the request for interconnection.

27 On 12 March 2024, iBoom followed up with FSMTC and TRA for why there was no response to the request and requested the TRA's assistance with the matter. The TRA treated this as an official request for intervention.

28 On 13 March 2024, the TRA emailed FSMTC restating that an official request for interconnection and access had been made to FSMTC by iBoom on 5 February, and that FSMTC is expected to have reached an agreement in good faith with another service provider within 30 days of a request, as per Section 340 of the Act and Section 9 of the Interconnection and Access Rules. The TRA asked FSMTC to explain by 20 March why no agreement had been reached with iBoom.

29 On 13 May 2024, having received no satisfactory response from FSMTC, the TRA issued a Notice of Intervention, declaring that the TRA will determine the access and interconnection agreements. This included a formal Request for information from both parties.

30 On 30 May 2024, the TRA issued a Notice of Investigation against FSMTC because it had not provided the requested information.

31 On 14 June 2024, FSMTC did not respond to the TRA's previous letters, so the TRA issued a Notice of Contravention to FSMTC. This required FSMTC to respond to the RFI by 5 July, and respond to the Notice of Contravention by 28 June 2024.

32 On 11 July 2024, the TRA sent a letter to FSMTC's board of directors informing the Board that FSMTC management had failed to comply with the company's statutory duty to respond to the RFI company's lack of response to the previous letters. The TRA declared that it would proceed with drafting an Interconnection and Access agreement on behalf of FSMTC and iBoom.

33 On 29 August 2024, the TRA issued its draft Interconnection Agreement to iBoom and FSMTC for feedback. The TRA did not receive any feedback or objection from iBoom or FSMTC regarding the draft Interconnection Agreement.

34 On 19 September 2024, the TRA issued the final Interconnection Agreement to iBoom and FSMTC for signing and gave the parties 14 days to appeal the agreement. No appeals were received.

35 On 29 November 2024, the TRA issued its draft Access Agreement to iBoom and FSMTC for feedback. The TRA did not receive any feedback or objection from iBoom or FSMTC regarding the draft Access Agreement.

36 On 13 December 2024, the TRA issued the final Access Agreement to iBoom and FSMTC for signing and gave the parties 14 days to appeal the agreement. No appeals were received.

37 On 31 May 2025, the TRA wrote to iBoom! and FSMTC to enforce the interconnection agreement, and required FSMTC and iBoom to submit written progress reports by 13 June 2025.

38 On 27 June 2025, the TRA received confirmation from FSMTC that interconnection with iBoom was successful, and that iBoom had completed its setup and was ready to begin testing.

39 Between August and September 2025, TRA followed up with iBoom to confirm the interconnection agreement. iBoom confirmed that it was satisfied with the connection and that any remaining steps to activate services sit with them. The TRA considers this matter resolved.

40 No request to support the implementation of the Access Agreement has been brought to the TRA, so the TRA considers the Access Agreement matter inactive unless either party seeks further assistance in relation to the determined access agreement.

Granting licenses

41 In the year ending 30 September 2025, we issued four new licenses.

42 As per section 319(5) of the Act, the remainder of this report includes:

- A list of the licenses issued under the Act and in force as at 30 September 2025;
- A list of the interconnection and access agreements in force as at 30 September 2025;
- A summary of any material litigation involving the TRA; and
- A description of the activities carried out during the year in respect of the universal access plan.

List of Licenses Issued under the Act

43 The licenses currently in force under the Act, as at 30 September 2025, are:

Licensee	Type of license	Date issued	Duration	Specifics
FSMtech Inc.	Class Operating License No 004	16 August 2024	15 years	This Class Operating License does not authorize FSM Tech to construct, own, or operate a

Licensee	Type of license	Date issued	Duration	Specifics
				Specified Communications Network in the FSM. This license authorizes FSM Tech Pohnpei to provide certain types of communication services, including wireless connectivity and data transmission services, and public internet access services.
iSolutions Micronesia Ltd	Individual Operating License N0 IL-007	20 March 2024	20 years	This license allows iSolutions Micronesia Ltd to have terrestrial cable transmission facilities, terrestrial radio communications transmission facilities, international gateway service facilities, and satellite earth station facilities. The license also authorizes iSolutions Micronesia Ltd to provide certain types of communication services, including wireline connectivity, wireless connectivity and data transmission services, and public internet access services.
Starlink Pacific Islands, LLC	Individual Operating License N0 IL-006	19 March 2024	20 years	This license allows Starlink to have terrestrial cable transmission facilities, terrestrial radio communications transmission facilities, international gateway service facilities and satellite earth station facilities. The license also authorizes Starlink to provide certain types of communication services, including wireline connectivity, wireless connectivity and data transmission services, and public internet access services.
iBoom	Mobile Cellular Frequency License No. FL-MC-002	20 February 2024	15	This license authorizes iBoom to provide services at certain frequencies and to specific spectrum blocks.
Chuuk Public Utility Corporation	Individual Operating License No. IL-005	1 June 2021	20 years	This license allows CPUC to have terrestrial cable transmission facilities, international gateway services facilities, and satellite earth station facilities. The license also authorizes CPUC to provide certain types of communication services,

Licensee	Type of license	Date issued	Duration	Specifics
				including wireline connectivity, wireless connectivity and data transmission services, wireless connectivity and data transmission services, and public internet access services.
MCS Pohnpei Inc.	Class Operating License No 001	16 September 2020	15 years	This Class Operating License does not authorize MCS Pohnpei to construct, own, or operate a Specified Communications Network in the FSM. This license authorizes MCS Pohnpei to provide certain types of communication services, including wireless connectivity and data transmission services, and public internet access services.
Kacific Broadband Satellite(s) International Ltd	Individual Operating License No IL-004	30 June 2020	20 years	This license allows Kacific to have terrestrial cable transmission facilities, terrestrial radio communications transmission facilities, international gateway service facilities, and satellite earth station facilities. The license also authorizes Kacific to provide certain types of communication services, including wireline connectivity, wireless connectivity and data transmission services, and public internet access services.
iBoom	Individual Operating License No IL-003	21 April 2020	20 years	This license allows iBoom to have terrestrial cable transmission facilities, international gateway services facilities, and satellite earth station facilities. The license also authorizes iBoom to provide certain types of communication services, including wireline connectivity, wireless connectivity and data transmission, and public internet access services.
FSMTC	Individual Operating License No IL-001	14 October 2019	20 years	This license allows FSMTC to have a communication network, including terrestrial cable transmission facilities, terrestrial radio communication transmission facilities, submarine cable and cable landing station facilities, and international gateway services facilities.

Licensee	Type of license	Date issued	Duration	Specifics
				The license also authorizes FSMTC to provide certain types of communication services, including wireline connectivity, wireless connectivity and data transmission services, fixed and/or mobile public voice services, and public internet access services.
CableCorp	Individual Operating License No IL-002	14 October 2019	20 years	This license allows CableCorp to have a communication network, including submarine cable and cable landing facilities, terrestrial cable transmission facilities, and terrestrial radio communications transmission facilities. The license also authorizes CableCorp to provide wholesale connectivity and data transmission services to a license holder on non-discriminatory and cost-based terms.
FSMTC	Mobile Cellular License No FL-MC-001	14 October 2019	20 years	This license authorizes FSMTC to provide services at certain frequencies and to specific spectrum blocks.

List of Interconnection and Access Agreements

44 Section 319(5)(b) of the Act requires the TRA annual report to list the interconnection and access agreements then in force. As at 30 September 2025, there are three (3) interconnection and access agreements in force.

45 The Deed Granting Indefeasible Rights of Use (IRU Deed) relating to certain strands of the HANTRU-1 Cable and access to cable landing stations, entered into between CableCorp and the FSMTC dated 2 February 2018 (predating the establishment of the TRA).

46 The Interconnection Agreement determined by the TRA and entered into by iBoom and FSMTC, dated 19 September 2024.

47 The access agreement determined by the TRA and entered into by iBoom and FSMTC was determined on 13 December 2024.

Material Litigation

48 Section 319(5)(c) of the Act requires the TRA annual report to outline a summary of material litigation involving the TRA. There was no material litigation involving the TRA in the year ending 30 September 2025.

Universal Access Plan Activities

49 The purpose of Universal Access policies, plans, and funding is to address the provision of telecommunication services to those parts of the population that might not otherwise get access to telecommunication services or services of a reasonable standard. An example is communities living in more distant or remote areas where the provision of telecommunications services is uneconomic. As a result, unless the service is supported by public funding, people will not be able to access services of a reasonable standard.

50 Section 319(5)(d) of the Act requires the TRA annual report to describe the activities carried out during the year in respect of the Universal Access Plan. Under section 367 of the Act, the TRA must prepare and publish a Universal Access Plan once the Secretary for Telecommunications has issued a Universal Access Policy and sent the TRA a list of geographical areas that are eligible under the Universal Access Policy for universal service obligations and funding. To date, the Secretary has not issued a Universal Access Policy.

51 The Act also requires any licensee of the TRA to have an obligation to provide services under the Universal Access Policy in the eligible geographic areas. One way to achieve this is to include a Universal Access obligation in the license. The TRA Individual Operating Licenses include a condition requiring the licensee to comply with any directive issued by the TRA regarding the licensee's compliance with any universal access service obligation. This lays the foundation for the TRA and licensees to respond if a Universal Access Policy is issued in the future.

52 The FSM Government and the World Bank have agreed on project funding to enable the FSM Government to support the provision of telecommunication infrastructure and services to remote communities. This digital connectivity project is being delivered through CableCorp and is currently in the early design stage. We also anticipate that increased competition from new licensees will stimulate the provision of additional services with a wider geographic scope.

53 On 21 April 2020, the 21st FSM Congress approved a World Bank grant which would see significant investment by CableCorp into bringing fiber to the premises for the main islands of the FSM, enhanced outer island connectivity by satellite, and the development of E-government services designed to enable all citizens to access Government services easily and more quickly.

54 Recent market developments, such as the arrival of Starlink and the progress of CableCorp's FTTP network could help determine if a Universal Access Plan is needed. In particular, Starlink's low prices and full coverage of FSM, including the outer islands, could be more effective at reaching remote areas than other service providers could offer under a Universal Access Plan. The TRA will continue to monitor the uptake of Starlink services and the future use of CableCorp's FTTP network to assess whether a Universal Access Plan is needed and what it would need to address.

Annex – List of defined terms

APA	The Administrative Procedures Act
CPUC	The Chuuk Public Utility Corporation

DTC&I	The Department of Transportation, Communications, & Infrastructure
EMC	East Micronesia Cable System
FSMTC	Telecommunications Corporation of the Federated States of Micronesia
IRU	Indefeasible Rights of Use
ITU	International Telecommunications Union
ISP	Internet Service Provider
NTFA	National Table of Frequency Allocations
The Act	The FSM Telecommunications Act of 2014
The FSM	The Federated States of Micronesia
CableCorp	FSM Telecommunications Cable Corporation
The TRA	The Telecommunication Regulation Authority

Annex – Members of the TRA

One member of the TRA was appointed in 2018. A second member was appointed in June 2023. Mathias Lawrence, previously appointed in 2018, resigned on June 26 2024. The current members are:

Takuro Akinaga	The Chief Executive Officer of the TRA, and is responsible for the management of the TRA. Takuro was the former Chief Executive of FSMTC, finishing that role in 2010
Shaun Suliol	An experienced IT Manager from FSM, has held key positions at the College of Micronesia-FSM and FIMS Inc.

Annex – Register of Consultants

55 Several consultants are advisors to the TRA. As of the year ending 30 September 2025, these were:

Name	Position Held	Area of expertise or project responsibilities
Castalia Limited	Consultant	Regulatory Support and Data Collection
AnS	Consultant	Spectrum advisers