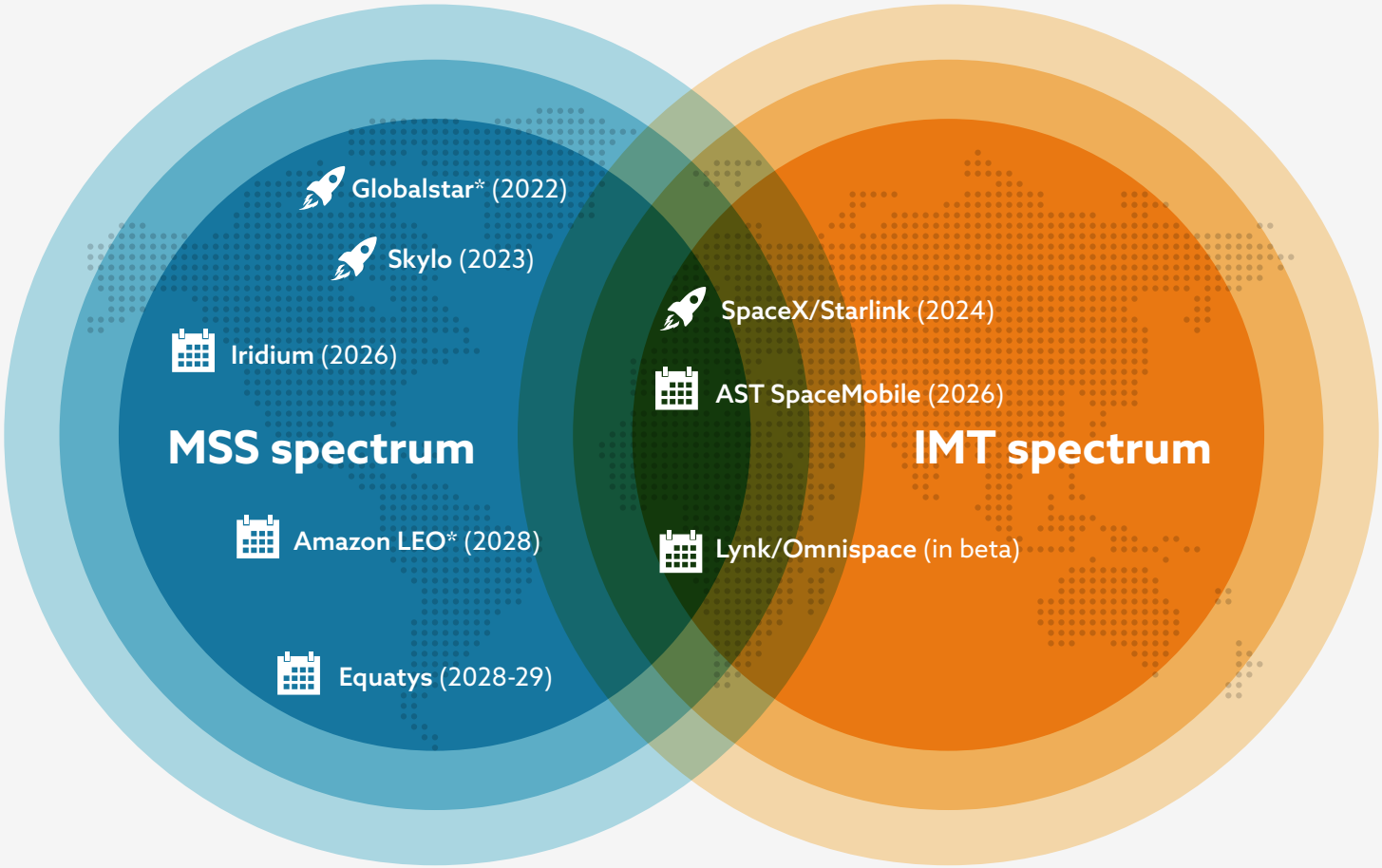
POLICY IMPACT PARTNERS

Summary of the Key Players in the D2D Market

live services planned services



All the key players have now indicated they will use MSS spectrum for D2D services: none are relying solely on access to IMT spectrum

*Amazon plans to acquire Globalstar in a transaction that is scheduled to complete in 2027

Summary of the Key Players in the D2D Market

Globalstar – supporting D2D features in Apple's iPhones

Key partners

- Apple
- Globalstar has agreed to be acquired by Amazon

Access to spectrum

MSS L-band and S-band spectrum (1610-1626.5 & 2483.5-2500 MHz)

Key D2D markets

Live in North America, Western Europe, Oceania and Japan

Service notes

iPhones are able to connect to Globalstar's satellites

Constellation

- 32 LEO satellites
- Next generation C-3 system will consist of 48 satellites

D2D adoption

Can be used by anyone with an iPhone 14 or later model in 18 countries

SpaceX/Starlink – delivering D2D via mobile operators' IMT spectrum

Key partners

Major mobile operators, including T-Mobile US, KDDI, Deutsche Telekom, VMO2, Enel, Kyivstar, Rogers

Access to spectrum

- IMT via MNO partners
- MSS – Acquiring 50 MHz S-band spectrum from Echostar in the US and global MSS licences

Key D2D markets

Live in North America, UK, Spain, Switzerland, Nigeria, Kenya, Philippines, Oceania, Ukraine, Japan

Service notes

Supports text, data, IoT and voice, promising video in 2027 (via MSS spectrum)

Constellation

- 650 LEO satellites used for D2D
- New constellation planned for 2027

D2D adoption

Connecting more than 7.4 million devices monthly across 30 countries

Skylo – a D2D platform that works across different operators

Key partners

Mobile and satellite operators including Viasat/Inmarsat, Echostar, Ligado, TerreStar, Space42

Access to spectrum

Satellite partners use their L-band and S-band MSS spectrum to support Skylo's D2D proposition

Key D2D markets

Live in 39 countries across North America, Europe and Oceania

Service notes

Integrated into some Google, Samsung & Garmin devices, Skylo's D2D platform is based on 3GPP Rel 17

Constellation

Uses satellites from Viasat, Echostar, Ligado, TerreStar

D2D adoption

In April 2026, Skylo said it had 15 million users

AST SpaceMobile – preparing to launch D2D services in 2026

Key partners

- Forming a JV in Europe with Vodafone
- Almost 60 mobile operators

Access to spectrum

- IMT via MNO partners
- 45 MHz of L-band MSS spectrum in North America & 60 MHz of S-band globally (priority rights behind Echostar & Omnispace)

Key D2D markets

Initial target markets include North America, Japan, Saudi Arabia and UK

Service notes

- Uses phased antenna array
- Achieved 98.9 Mbps peak speeds in demo

Constellation

Plans to launch 45 BlueBird satellites in 2026

D2D adoption

Planning to launch late in 2026

live services planned services

Summary of the Key Players in the D2D Market

Amazon LEO – plans to acquire Globalstar

Key partners

- Plans to acquire Globalstar
- Will continue to support Apple's iPhones D2D features

Access to spectrum

Acquisition of Globalstar will give access to 1.6/2.4 GHz MSS spectrum globally

Key D2D markets

D2D rollout plans, beyond those of Globalstar, not public yet

Service notes

Amazon intends to launch its own D2D services in 2028

Constellation

More than 200 LEO fixed broadband satellites live out of a planned 3,232

D2D adoption

- Not launched yet
- Globalstar acquisition scheduled to complete in 2027

Equatys – a wholesale D2D joint venture between Viasat/Space42

Key partners

- Viasat & Space42 (Thuraya) plan to pool their satellite infrastructure & MSS spectrum
- Skylo, ESA, Ligado, Telesat

Access to spectrum

Viasat & Space42 together have 100 MHz of L-band and S-band MSS spectrum capacity.

Key D2D markets

Demonstrations in India, Middle East, Brazil, Hawaii and Mexico

Service notes

Plan to support 3GPP NTN specification

Constellation

JV is planning a multi-tenant constellation of up to 2,800 satellites across 3 altitude layers

D2D adoption

Skylo's D2D platform uses Viasat & Space42 satellites, among others

Lynk – developing a D2D platform with Omnispace & SES

Key partners

- Lynk and Omnispace are merging
- New entity is partnering with SES
- Mobile operators in 50 countries

Access to spectrum

Lynk is using the 689-960 MHz IMT bands for D2D, while Omnispace has 60 MHz of S-band MSS spectrum

Key D2D markets

A beta service is live in eight countries (mostly island nations in the Pacific)

Service notes

Planning to support all 3GPP compliant devices

Constellation

10 LEO satellites live today. Planned constellation of up to 640 satellites.

D2D adoption

Ookla has reported that Lynk is serving some D2D connections, but the numbers are likely to be small

Iridium – preparing to launch D2D IoT services in 2026

Key partners

Vodafone IoT, Synverse and Deutsche Telekom, Karrier One

Access to spectrum

MSS spectrum in the 1.6 GHz band

Key D2D markets

Plans to launch D2D commercial services in 2026, via mobile operators, aimed at IoT use cases

Service notes

Planning to support 3GPP NB-IoT NTN compatible devices

Constellation

66 LEO satellites

D2D adoption

Not launched yet

live services planned services