

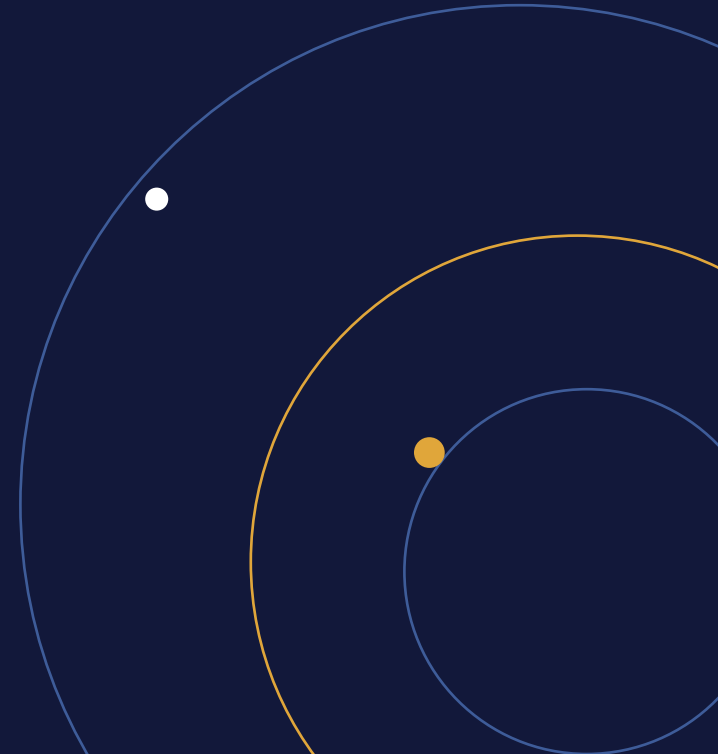
UN/IAF WORKSHOP · SESSION 4 · ANTALYA, TÜRKİYE · 2026

Regulatory Infrastructure

How governance choices shape participation in Africa's space economy

A view from Lesotho - with lessons from Namibia, South Africa and Uganda

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The space economy is won or lost at the border

Rockets and satellites are built elsewhere. **What each country captures from them is decided by its rules.**

Regulatory infrastructure

the legal, institutional and governance arrangements - licensing, ownership rules, spectrum, data and tax - that decide who may operate, and who benefits.

For small states, this is our launch capability. We may not build constellations - but we set the terms on which they serve our people.

SPACE LAYER

LEO constellations - Starlink, Amazon Leo (built & owned abroad)



REGULATORY LAYER

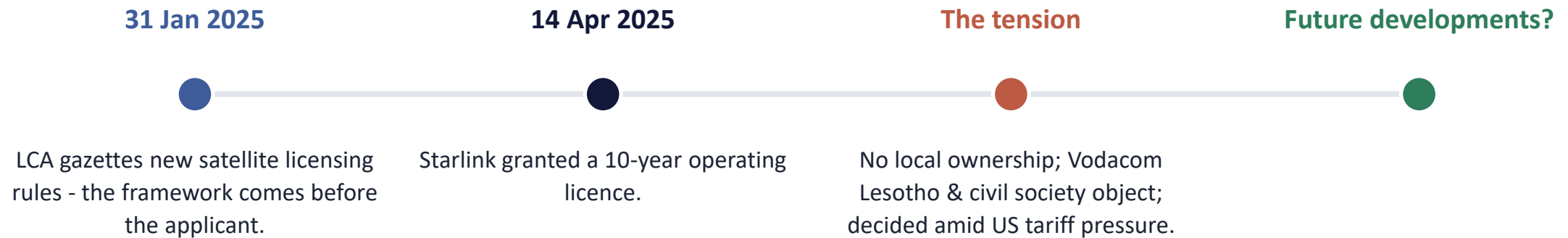
licensing · ownership · spectrum · data · tax
the lever you control



NATIONAL VALUE

access · jobs · revenue · data control · skills

A fast 'yes' - built on rules, but contested



Lesotho chose speed and access. The open question is local participation and value capture - not a verdict, but the trade-off every small state now faces.

What the 'yes' bought - and what it left open

+ What it should bring

- Rapid coverage in the remote highlands, where fibre won't reach
- Competitive pressure on incumbents; more choice
- A clear, gazetted framework - certainty for investors
- A first-mover signal: open for space-based business

? What it left open

- Minimal local ownership or equity - limited direct value capture
- Most regulatory leverage spent at the point of licensing
- Data routing & oversight handled how? (cf. Uganda's gateway)
- A precedent for the next operator (Amazon Leo, others)

A balance sheet, not a verdict - the same trade-off is now on every small state's desk.

Same pressure, three different answers

LESOTHO said yes directly - a direct 10-year licence. Its neighbours chose other routes to the same local-ownership impasse:

● Namibia

"No - for now"

MOVE

Rejected Starlink (Mar 2026)

RULE

51% local ownership (Comms Act s.46); met 3 of 6 criteria

OUTCOME

Sovereignty protected; access delayed; 100s of citizens appealed

● South Africa

"Change the rule"

MOVE

30% Black-ownership → equity-equivalent (EEIP)

DEAL

SpaceX pledge R2.5bn incl. 5,000 rural schools

OUTCOME

Invest, don't cede equity; contested; ~12–18 months

● Uganda

"Control, not equity"

MOVE

Licensed Starlink (May 2026) on conditions

HOW

National gateway · device registration · local tax · onshore data

OUTCOME

Regulatory control without ownership concessions

Competition is changing who holds the cards

● Amazon Leo arrives

Entered South Africa via Herotel, a local licensed operator (Jul 2026)
- so the ownership rule bites differently. Service expected 2027.

● Operators partner, not just compete

Vodacom - Starlink (25+ countries) and Airtel deals treat satellite as backhaul that extends mobile networks.

The lesson for regulators

1 operator

regulator is a price-taker

3 operators

regulator sets the terms

Local-operator partnerships can deliver local participation commercially - even where equity is stuck.

No regulator does this alone



Politics & diplomacy

Trade leverage and cabinet directives shaped outcomes (Lesotho-US tariffs; SA's ministerial directive). Space access became foreign & industrial policy.



Regulators

LCA, CRAN, ICASA, UCC design the market-access rules - and the design is the difference.



Operators

Starlink/SpaceX, Amazon Leo, Vodacom, Paratus, Herotel - global systems meeting national terms.



Finance & legal

Investment pledges, empowerment law, licence conditions, tax — and the courts (appeals in Namibia, challenges in SA).

For most African states, the 'space agency' question is really a coordination question across these four.

A practical playbook for the next country

1

Build the framework before the applicant

That clarity outlives any single deal.

2

Name your non-negotiable

Ownership, control, or value - you rarely get all three. Choose up front.

3

Prefer conditions you can enforce

Gateways, data routing, coverage, tax (Uganda) beat paper equity you can't.

4

Use competition as leverage

Don't negotiate against one operator; let entrants bid up local commitments.

5

Keep it technology-neutral & predictable

Same obligations across operators; investors price certainty.

6

Don't spend all your leverage at signing

Build reviews, milestones and renewal conditions into the licence.

WHERE THIS GOES NEXT

The winners will be the countries whose rules are ready

- Direct-to-device (satellite straight to phones) will reopen every licensing question - plan for it now
- More LEO entrants → more leverage, more complexity
- Regional harmonisation (SADC / AU) can turn small markets into one worth negotiating for

**Regulatory infrastructure is
our space programme.**

Design it on purpose.

Thank you · Questions welcome

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