

Nigeria

5 providers authorised · 4 operational · 128 million Nigerians unconnected

CONCERN

MODERATE

PROVIDERS

4 Operational / 5 Authorized

Latest update: 2026



SkyCommons Observatory is a project of Open Knowledge to map power, expose risks, and advance public-interest principles into governance of LEO satellite internet services.

Our scores rating 'level of concern' are based on key public-interest principles defined in the table [here](#). This country profile is one of several on: skycommons.okfn.org

Summary

Nigeria uses LEO technology to reach communities that terrestrial networks cannot. Over 23 million people live in areas where building a base station makes no commercial sense. A \$2 billion, 90,000 km national fiber project is underway, but it is taking time. LEO provides a resilient backup. It is cable-free, and harder to vandalize.

Starlink was licensed in 2022 and is currently the only LEO provider in Nigeria. In January 2026, the Nigerian Communications Commission (NCC) licensed four more providers, on the basis that a single foreign company controlling national connectivity was a security risk. The 2026 licences came with stricter conditions than for Starlink's original approval. For instance, Amazon Leo was required to hold Gateway and ISP licences before selling to the public, and both Amazon Leo and BeetleSat faced rural-first coverage conditions.

Hardware costs remain a serious affordability barrier. The entry-level Starlink Mini kit costs ₦318,000 (~\$231), which is 4.5 months of the ₦70,000 (~\$51) national minimum wage and

nearly a full month’s average salary. Only about 7% of Nigerians earn above ₦200,000 (~\$147) a month.

Nigeria has an accountability apparatus and a record of enforcement. When Starlink tried to raise subscription prices by 97% without regulatory approval, the NCC issued a pre-enforcement action under Sections 108 and 111 of the Nigerian Communications Act and rolled the price back to ₦57,000 (~\$41).

In December 2025, Nigeria became the first country to subject a satellite provider to the same biometric identity verification required for mobile SIM cards: every Starlink subscriber must now link their National Identification Number and facial data to their terminal.

A February 2026 agreement between the NCC and the Nigeria Data Protection Commission added a data governance layer. It requires satellite operators to store Nigerian user data in adequately protected jurisdictions or route it through approved cross-border transfer instruments. Satellite and telecom infrastructure has also been designated Critical National Information Infrastructure, which gives the state formal protection powers over ground stations and network facilities.

Nigeria's licensing framework covers three publicly documented instruments. The 2024 Quality of Service Regulations require quarterly reporting on service availability and billing integrity. This is the same standard applied to terrestrial operators. In January 2026, the NCC launched formal public consultations on Direct-to-Device connectivity and spectrum sharing. For the first time, future LEO rules were opened to public input.

Two gaps remain: satellite operators face no local technical presence requirement, and no public outage disclosure obligation.

Timeline



[See [online version](#)]

Research highlights

Competition

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MODERATE

OPERATIONAL Starlink BeetleSat (enterprise) Satelio IoT (enterprise) Eutelsat OneWeb (government + enterprise)	AUTHORISED Amazon Leo
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Nigeria has authorised five LEO satellite operators. Starlink entered the market in 2022 and remained the country's only operational consumer LEO broadband provider until 2026. OneWeb received regulatory authorisation in October 2023, although its Nigerian commercial service followed later. In January 2026, the NCC authorised Amazon Leo, BeetleSat and Satelio IoT, bringing the number of authorised LEO operators to five. THE NCC was explicit: one foreign company controlling national satellite connectivity was a security risk.

Amazon Leo has not yet announced its prices, but is positioning itself as a retail competitor to Starlink by targeting 400 Mbps speeds. The other three companies operate in separate niches, BeetleSat in industrial backhaul, Satelio IoT in machine-to-machine, and Eutelsat OneWeb in government and B2B wholesale through a partnership with state-owned NIGCOMSAT. For households, the choice will be between Starlink and Amazon Leo.

Domestic ISPs are concerned. ALTON and ATCON argue that LEO providers, operating outside local price caps with minimal physical infrastructure, have a structural advantage that could drive local operators out of the market before they can adapt.

Affordability

CONCERN

HIGH

STARLINK SUBSCRIPTION PRICE \$28-\$41	HARDWARE COST \$231-\$429
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Hardware cost is the main barrier to entry in Nigeria. The entry-level Starlink Mini kit costs ₦318,000 (~\$231), which is the equivalent of 4.5 months of the ₦70,000 (~\$51) monthly national minimum wage, and nearly a full month of the average salary of ₦339,000 (~\$247). The standard kit costs ₦590,000 (~\$429). Only around 7% of Nigerians earn above ₦200,000 a month, putting even the lowest priced hardware out of reach for most.

Monthly fees are more manageable but still significant: ₦38,000 (~\$28) for the Mini tier, ₦57,000 (~\$41) for standard residential, which reflects regulatory intervention. In October 2024, Starlink attempted to raise its residential price by 97% without NCC approval. The regulator issued a pre-enforcement action and Starlink rolled back the hike.

Pricing volatility remains a structural risk. Starlink prices its Nigeria service in naira (the national currency) but adjusts it in response to currency depreciation and inflation, which it has cited as the basis for successive hikes. The parallel market rate, around ₦1,410 as of mid-July 2026, versus the ₦1,382 official rate, sits well above the official window, so continued naira weakness translates fairly directly into upward pressure on both hardware and subscription costs. The prices can shift up to 50% outside the NCC's standard tariff-approval cycle. Nigeria's Universal Service Provision Fund is tied to LEO subsidies in an effort to extend access to the 23 million Nigerians in connectivity deserts. But there is no operational household subsidy mechanism.

Starlink prices compared to leading ISPs

INTERNET SERVICE PROVIDERS	Upfront Payment Required (₦)	Average Subscription (₦/month)	12-Month Total Cost of Ownership (₦)	12-Month Total Cost (\$USD)
Starlink Residential (Standard Kit)	590,000	57,000	1,274,000	~\$904
Starlink Residential (Mini Kit)	318,000	57,000	1,002,000	~\$711
MTN FibreX – 50 Mbps Unlimited	0	25,000	300,000	~\$213
FibreOne – SmartHome Plus	77,250	44,003	605,286	~\$429
ipNX – FOS Unlimited (75 Mbps+)	45,150	62,350	793,350	~\$563

Figures are from 15 July 2026 (and are subject to currency fluctuations) based on each provider's published pricing for unlimited (or highest-tier) plans with comparable speed to Starlink (50–150 Mbps).

Accessibility

CONCERN MODERATE

LEO COVERAGE 100%	BROADBAND PENETRATION 51.97%
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Nigeria's connectivity challenges are structural. Broadband penetration reached 51.97% in December 2025, missing the government's own 70% target and leaving around 128 million Nigerians unconnected. Terrestrial infrastructure is unreliable: over 19,000 fiber cuts from vandalism and construction were recorded in early 2025 alone. The telecom market is an oligopoly. MTN holds 51.87% of subscribers and Airtel holds 33.94%. Rural areas are underserved because they offer low revenue and high security risk.

LEO satellites offer 100% technical geographic coverage. However, access is effectively rationed by price. There were only around 91,991 Starlink subscribers at the end of 2025. The NCC identified 87 clusters of unserved and underserved areas, covering approximately 23 million Nigerians, all in locations where terrestrial deployment is commercially unviable. Affordability is a further barrier. The Commission's figures quantify the coverage gap, not

household ability to pay, so they cannot tell us how many of these Nigerians can afford LEO hardware. This creates digital elitism risk: geographic coverage expands while economic access does not, leaving the communities most in need on the wrong side of a cost barrier. The NCC's 2024 Cluster Gap study is tying USP Fund disbursements to LEO operators serving commercially unviable areas.

Airtel Nigeria now integrates Starlink capacity to sustain service during terrestrial outages, which clearly demonstrates that LEO has become operational infrastructure. A January 2026 public consultation on Direct-to-Device technology, which would allow ordinary smartphones to connect to satellites without a dish, could substantially change the accessibility picture if it goes to market.

Governance

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All Starlink terminals must be linked to facial data and identity number

Nigeria's governance record is split. Starlink's 2022 approval was executive-driven and fast-tracked by then-Minister Pantami as part of the National Broadband Plan push. No public consultation was documented. The January 2026 multi-provider expansion was more transparent. The NCC even launched formal public consultation papers on Direct-to-Device connectivity and spectrum sharing before licensing new entrants.

The strategic rationale explicitly stated high dependence on a single foreign operator as a national security risk. Presidential aide Daniel Bwala identified Starlink specifically as an intelligence gap. Standard mobile traffic routes through local towers that security agencies can monitor; satellite traffic does not. The government's response was the biometric NIN mandate of December 2025, requiring every Starlink subscriber to link their national identity number and facial data to their terminal. This was the first time a satellite provider in Nigeria was subjected to the same Know Your Customer (KYC) requirements as mobile SIM cards.

Eutelsat OneWeb partnered with state-owned NIGCOMSAT in order to acquire landing rights and use government infrastructure in exchange for local data routing and employment obligations. The NCC is now pushing Amazon Leo toward the same model.

The participation process is more open than it was in 2022, but it is still limited to large operators. Small and rural ISPs report being excluded from NCC consultations due to technical and capital-entry thresholds.

Accountability

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Nigeria's licensing framework includes public accountability measures. Every LEO operator must hold three instruments: a seven-year landing permit authorising satellite signals over

Nigerian territory; a five-year ISP licence (₦500,000/~\$364) to sell directly to the public; and a ten-year international gateway licence (₦25–50 million/~\$18,200–\$36,400) to manage international traffic independently. [The 2024 Quality of Service Regulations](#) apply the same quarterly reporting standards on service availability and billing integrity to satellite operators as to terrestrial telcos. Enforcement has produced concrete outcomes. When Starlink attempted a 97% residential price hike in October 2024 without approval, the NCC issued a pre-enforcement action under Sections 108 and 111 of the Nigerian Communications Act and secured a rollback to ₦57,000 (~\$41).

Newer entrants face stricter entry conditions than Starlink did: Amazon Leo was required to hold both gateway and ISP licences before selling to the public, and both Amazon Leo and BeetleSat carry rural-first coverage obligations that were not attached to Starlink's 2022 approval.

Data governance has been explicitly formalised. The Nigeria Data Protection Act (2023) applies to LEO operators. [A February 2026 agreement](#) between the NCC and the Nigeria Data Protection Commission requires satellite providers to store Nigerian user data in adequately protected jurisdictions or route it through approved cross-border transfer instruments. [Satellite infrastructure is designated as Critical National Information Infrastructure](#) under the Designation and Protection of Critical National Information Infrastructure Order, 2024, issued under the Cybercrimes Act, placing it under a state protection framework led by the Office of the National Security Adviser and making wilful damage a criminal offence.

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About this research

[SkyCommons Observatory](#) was created by the [Open Knowledge Foundation](#), a non-profit organisation working at the intersection of technology, openness, and governance. Our website (prototype) and research community questions the politics and processes of LEO satellite internet connectivity using open data and research methods. Is the public-interest met? We treat what happens in space as something that concerns everyone on Earth.



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