

Peru 2030: Policies for the Digital (R)evolution

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The GSMA is a global organisation unifying the mobile ecosystem to discover, develop and deliver innovation foundational to positive business environments and societal change. Our vision is to unlock the full power of connectivity so that people, industry and society thrive. Representing mobile operators and organisations across the mobile ecosystem and adjacent industries, the GSMA delivers for its members across three broad pillars: Connectivity for Good, Industry Services and Solutions, and Outreach. This activity includes advancing policy, tackling today's biggest societal challenges, underpinning the technology and interoperability that make mobile work and providing the world's largest platform to convene the mobile ecosystem at the MWC and M360 series of events.

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Peru 2030: Policies for the Digital (R)evolution

Mobile connectivity has, without a doubt, become the most effective tool for democratising access to the opportunities of the digital world. The GSMA, a global association representing mobile operators, gathers on this occasion to put forward a series of proposals addressed to Peru's incoming administration. This document builds on the progress achieved in recent years and highlights the public policy decisions still needed to broaden and consolidate an enabling environment that allows the country to keep advancing in its digital transformation.

For the next step, it is essential that authorities recognise the telecommunications sector as an essential service provider — on a par with education, productivity, healthcare, or financial inclusion — and as a pillar of any national development strategy.

As a result of decades of sustained investment in network infrastructure and in developing the human capacity needed to sustain connectivity, Peru's mobile operators have managed to provide 95%¹ of the population with mobile internet coverage. However, there is a significant usage gap, as 39% of the population that is within the coverage footprint does not access the benefits of connectivity due to various barriers, including device affordability, a lack of digital skills, the absence of relevant local content, and safety and security concerns.

¹ GSMA Intelligence, 2024.

The digital future is not guaranteed, but built on legal certainty and incentives to innovate.

This document is meant to serve as a tool for new authorities to continue driving an inclusive, competitive and resilient digital ecosystem that is capable of responding to current challenges and building a better future for society.

Peru's digital landscape: Recommendations from the mobile industry for the incoming administration.

To expand the reach of connectivity to all society and, with it, economic development, the **authorities have a responsibility to create an environment that guarantees legal certainty, supports the sustainability of investment, and removes the barriers and asymmetries** that harm the positive growth of digital transformation.

Below is a series of public policy and regulatory recommendations organised into three pillars:

- **Institutional and regulatory strengthening of the digital ecosystem.**
- **Deployment of agile, efficient and modern infrastructure.**
- **Digital inclusion as a driver of national development.**



**Institutional
and regulatory
strengthening of the
digital ecosystem**



**Deployment of agile,
efficient and modern
infrastructure**



**Digital inclusion as
a driver of national
development**

01.

Institutional and regulatory strengthening of the digital ecosystem

1. Evolving towards a technical, autonomous authority with an ecosystem-wide vision.

It is necessary to consolidate a regulator with robust technical capabilities and institutional independence sustained over time. Its mission should focus on facilitating the expansion of connectivity through smart deregulation, regulatory simplification, and the promotion of innovation and digital development.

A competitive and sustainable digital ecosystem requires simplified regulatory and institutional frameworks that go beyond traditional telecommunications services and operate consistently across the entire digital value chain, including service and content providers, who benefit from the infrastructure deployed and maintained by mobile operators.

**Peru's digital future
depends on public
policy decisions
made today.**

Asymmetric conditions among players competing in the same segment create distortions that discourage investment and innovation. Equipping regulators and policymakers with expert human resources, technical autonomy and comparative policy tools will support a policy consistent with the goals of expanding connectivity and its benefits.

A technically sound and institutionally stable regulatory authority is a necessary condition for the legal certainty required by a capital-intensive sector such as the telecommunications sector. This is especially important to effectively support the technological evolution of Peru's digital economy, of which 5G expansion is a clear example.

The authority's core objective should be to ensure regulatory stability, avoiding abrupt regulatory changes, through ongoing dialogue with the private sector — all in order to find incentives to enable the substantial investment required to expand connectivity and effectively close the usage gap.

2. Introducing modern and efficient regulation that strengthens legal certainty and supports investment.

The current regulatory framework for the telecommunications sector was created for an ecosystem substantially different from today's. Technological evolution, along with the proliferation of new services, technologies and value-chain players, has rendered obsolete many rules that once responded to market realities that no longer exist. One example is the General Tariff Regulation and the Conditions of Use for Public Telecommunications Services, which create an imbalance among the different players in the digital ecosystem. It is important to assess the existing asymmetries and the burdens placed on mobile operators compared with other ecosystem players: ensuring symmetric, equalised treatment — in terms of obligations and oversight, for example — will foster an environment of greater innovation and efficiency.

It should also be noted that regulatory simplification is not achieved merely by repealing rules that are no longer applied or have lapsed. The entire body of regulation must be thoroughly reviewed, weighing the rationale, impact and effectiveness of each rule, and decisions must be made to reduce burdens that hinder the maximisation of the benefits of mobile connectivity.

Regulation should not become a barrier to development; on the contrary, it should be guided by proportionality and minimal intervention. The regulatory framework must be flexible and adapt to the evolving ecosystem without losing predictability or coherence.

The digital ecosystem requires a revision of regulatory asymmetries to reach its full potential.

3. Balancing regulatory responsibilities and obligations among the multiple actors of the digital ecosystem.

The internet works as a network of networks, made up of multiple links that enable data to travel from content servers to each user's mobile phone. In this ecosystem, mobile operators are the ones who invest the most to deploy, expand and maintain the access infrastructure connecting citizens directly. However, only three companies — large traffic generators or LTGs — generate and account for 70% of the mobile traffic carried on networks, with close to 30% of that traffic² being unsolicited by end users³.

Since they face no price signal for using networks, large traffic generators have no incentive to use them efficiently. Unsolicited traffic (such as autoplay videos and ads) or unoptimised traffic (such as videos streamed at resolutions higher than devices can support) is monetised by these companies, but has a negative impact on user experience, the environment, and networks' capacity.

Some large traffic generators claim they contribute by investing in datacentres, submarine cables or content distribution networks (CDNs). However, evidence shows that the main cost of connectivity lies in the access network, which is responsible for nearly 80% of total infrastructure costs, financed almost exclusively by telecommunications service providers.

Additionally, the presence of CDNs in the country does not mean that traffic is fully local, nor does it significantly reduce the burden on networks. When these points of presence are concentrated in only a few cities, a large portion of the traffic continues to travel across extensive parts of the network — especially in countries with Peru's orography, where rural and remote areas face greater connectivity challenges. It is key to distinguish between local and national traffic and assess the actual distribution of these infrastructures, as their main function is to optimise platforms' own services rather than contribute to the sustainability of the network as a whole.

One of the most pressing challenges facing regulation in the region is the deep asymmetry between mobile operators — who bear the cost of deploying and maintaining networks — and large digital platform and content providers, who generate a growing share of data traffic without contributing proportionately to sustaining the infrastructure they rely on.

² "Unsolicited Ads Generate Nearly 30% of Social Media App Traffic", CTTC, [link](#).

³ Efficient use of mobile networks in Latin America, GSMA, [link](#).

02.

Deployment of agile, efficient and modern infrastructure

Only with robust, up-to-date digital infrastructure can more competitive economies, more inclusive societies and more efficient services be built. Mobile networks are the foundation of digital transformation, connecting more people, businesses and administrations to the benefits of the internet, including healthcare, education, industry, transport, and finance. Delivering these benefits faster will require decisions aligned with connectivity goals.

While recent years have seen progress in reducing barriers to telecommunications infrastructure deployment, this progress has been set back by the adoption of the Environmental Management Regulation for the Telecommunications Sector, passed by Supreme Decree No. 023-2024-MTC, published in December 2024. This regulation represented a step backward from previous simplification efforts, eliminating key mechanisms for closing gaps: for example, automatic approval of environmental assessment forms for low-impact projects, and the introduction of new environmental requirements for infrastructure maintenance, upgrade and co-location activities.

Achieving the full potential of 5G requires a long-term vision and rules that promote investment.

The incoming administration's roadmap should include the need for technical working groups and dialogue with the private sector, to ensure an environmental framework that is technically sound, proportionate and predictable, and protects the environment without holding back investment or the deployment of digital infrastructure that is strategic for closing gaps and for the country's productive development.

4. Securing a spectrum policy focused on closing gaps and using spectrum efficiently.

Peru has taken an important step in the right direction regarding spectrum management⁴. Through Legislative Decree No. 1627 and its implementation⁵, the Ministry of Transport and Communications (MTC by its Spanish acronym) established a special mechanism for the 3.5 GHz band (key for 5G) that prioritises expanding coverage and connectivity over maximising tax collection. Spectrum access that translates into connectivity and more robust networks — rather than merely into tax revenue — is in line with international best practices.

For mobile connectivity to remain a driver of economic and social development, administrations must ensure sufficient spectrum availability, in the right bands for the proposed objectives, and at the times when demand requires it. This calls for the development of medium- and long-term spectrum roadmaps, through ongoing dialogue and coordination with the private sector. In all cases, spectrum prices must reflect its real economic value and must not become a fiscal instrument that discourages investment: artificial scarcity raises the cost of deployment and undermines the potential development of connectivity.

Furthermore, it is important to highlight the relationship between spectrum policy and the digitalisation of industries⁶. Apart from being an extraordinary opportunity for 5G expansion — for transport, healthcare, agriculture and mining — this relationship also poses a regulatory challenge that must be approached with caution. As set out in the Mobile Policy Handbook⁷, the most efficient way to meet verticals' spectrum needs is through well-designed licence conditions and agreements with mobile operators, who have network assets, technical expertise and scale built up through decades of sustained investment.

⁴ "Spectrum management in Latin America", GSMA, [link](#).

⁵ Legislative Decree No. 1627, [link](#).

⁶ "Spectrum reservation for verticals: the risks of splitting and sharing", GSMA, [link](#).

⁷ "Mobile Policy Handbook" GSMA, [link](#).

Evidence⁸ shows that spectrum set-asides for verticals are neither the only nor the best option for equipping industries with private networks or boosting their productivity.

Authorities must ensure that sufficient spectrum is available in harmonised bands through balanced, transparent processes, avoiding fragmentation that weakens the ecosystem as a whole.

5. Providing a reference framework and adopting measures to encourage the shift from legacy to next-generation technologies.

The adoption of fifth-generation technology has driven the gradual switch-off of legacy networks. This global effort seeks to address declining traffic on earlier network generations (2G/3G), the financial burden of maintaining certain obsolete infrastructure, and the need to use spectrum resources efficiently by migrating to newer technologies (4G/5G)⁹.

In many countries, mobile operators face significant obstacles in the shift to next-generation networks. The most common challenges include the lack of technology-neutral policies, dependence on legacy networks for critical services (such as emergency or SOS calls), the configuration of these networks as public services, and the affordability of the latest-generation devices¹⁰.

Authorities should provide a reference framework and create policy incentives to work with operators in this process. The shift to 4G/5G networks can benefit the population and improve user experience. Regulators can introduce measures to support and complement the adoption of next-generation networks and enable a smoother transition, in dialogue with the mobile industry — particularly in rural areas, where many population centres still have 2G technology only and remain excluded from the digital world. Given the characteristics of these areas, it is not sustainable for private investment alone to carry out the transition to new technologies.

⁸ “The impact of set-asides on private and public mobile networks”, GSMA, [link](#).

⁹ “Spectrum Policy Trends 2025” GSMA, [link](#).

¹⁰ “Technology upgrades and legacy network sunsets on the rise” GSMA, [link](#).

Managing networks with flexibility is essential for an efficient, innovative and productive digital economy.

Policy incentives offered by the authorities can play a central role in promoting innovation and public-private collaboration.

6. Enabling flexible energy schemes and demand aggregation for digital infrastructure.

Energy efficiency is a priority for mobile phone operators, for both financial and environmental reasons, since network operation increasingly relies on electricity consumption, which represents one of the main operating costs for these companies. In addition, the continuity of telecommunications services in Peru has been affected by frequent power outages, as these services do not receive priority treatment for service restoration, unlike other public services considered essential.

Policies that support and incentivise the shift towards more energy-efficient networks and practices in the mobile industry are important to achieve carbon emission reduction goals.

Collaborative efforts should be undertaken with the Ministry of Energy and Mines (MINEM, by its Spanish acronym) and the Supervisory Agency for Investment in Energy and Mining (Osinergmin, by its Spanish acronym) to update the energy regulatory framework and eliminate restrictions that limit telecommunications companies' access to the non-regulated market, allowing for the free negotiation of more efficient contracting arrangements. Likewise, the State should commit to facilitating the conditions for state-owned electricity companies to meet their service-continuity obligations.

7. Modernising the approach to net neutrality to enable new services with different levels of latency, quality and reliability, thereby unlocking the socio-economic benefits of 5G.

Technologies like 5G need to be supported by flexible and technically viable network management, moving beyond the rigid approaches that currently limit innovation, service quality, and preparedness for future generations of connectivity.

Operators need to be able to manage their networks, based on the principles of transparency, non-discrimination, necessity, and proportionality, in order to respond to users' needs and promote a more efficient, innovative, and productive digital economy.

03.

Digital inclusion as a driver of national development

To move toward a more productive, competitive and inclusive Peru, it is fundamental to promote access to, adoption and effective use of digital services. Closing the digital divide should be a strategic priority for national development.

On this path, mobile operators can be strategic allies. Despite reaching 95% population coverage, a significant usage gap still remains, as 39% of the population does not access the enormous benefits of connectivity, due to barriers such as the affordability of mobile phones, a lack of digital skills, and policies that tax as luxury goods the very devices and services that today serve as the main enablers of internet access — mobile phones.

8. Promoting a tax reform that is aligned with connectivity goals.

The heavy fiscal burden on mobile operators in Peru, through fees, royalties and sector-specific contributions, is one of the main disincentives to investment in network infrastructure, alongside legal uncertainty.

This tax pressure squeezes the margins available for network expansion and innovation. Reducing and rationalising these burdens is therefore a direct policy lever for expanding connectivity. One way to do this is by improving the canon system and broadening it to include other levies, such as the PRONATEL contribution. While there is an enabling legal framework, its regulatory implementation, which would allow operators' contributions to be used more effectively to close the digital divide, is still pending. This mechanism could also be used for the payment of general taxes.

At present, Peru uses the Works for Taxes (OxI) mechanism, an investment scheme that allows companies to pay their income tax in advance to finance and execute infrastructure projects, speeding up the process of closing gaps. However, applying it directly to connectivity projects requires regulatory adjustments and a more strategic, collaborative prioritisation of initiatives, which the incoming government could drive forward.

Reforming and establishing PRONATEL as a tool to promote genuine connectivity projects.

- 9.** After the 2018 reform of Peru's universal service fund (then called the Telecommunications Investment Fund), the National Telecommunications Programme (PRONATEL, by its Spanish acronym) was created, under the Ministry of Transport and Communications. The programme's objective is to close the digital divide in rural and remote areas, where there is a market frontier.

Peru's legal framework, under Decree 1599 of 2018, establishes that part of the fiscal burden could be offset by direct investment in rural areas; however, in the absence of regulations, this provision remains without effect, preventing the fulfilment of the mandate to expand connectivity to non-profitable areas.

This situation becomes more pressing in light of regional assessments¹¹ indicating that Universal Service Funds pose a two-fold structural problem: on one hand, their funding model has become outdated in relation to the realities of the digital ecosystem; on the other, their execution has historically been poor and, in many cases, devoid of metrics demonstrating their impact. Funds such as those financing PRONATEL are funded exclusively by contributions from telecommunications operators, even though, over the past decade, the sector's revenues have declined in relative terms, while the revenues of large traffic generators — who benefit from the networks that mobile operators sustain, without any form of compensation — have grown.

The proposal under consideration is to replace these funds or collection mechanisms with incentives for direct infrastructure investment, or to consider expanding the contribution base to include all players who benefit from the networks and do not currently contribute. In any case, implementing Decree 1599 and Supreme Decree No. 005-2025-MTC is the first step towards channelling available resources into greater real connectivity.

In recent years, the country has made concrete progress on coverage, developed its own mechanisms to expand rural connectivity, and taken important steps in deploying next-generation networks. However, a significant gap remains between what the ecosystem can offer and what is actually delivered to millions of people. The decisions made by the incoming administration regarding regulation, spectrum, infrastructure and digital inclusion will determine Peru's digital landscape of the next decade.

The mobile industry reaffirms its commitment to collaborating with the authorities to be a strategic ally in Peru's digital transformation.

¹¹ "Brechas de conectividad en América Latina" GSMA, [link](#).

Recommendations for a digital and connected **Peru**



Institutional and regulatory strengthening of the digital ecosystem

1. Evolving toward a technical, autonomous authority with an ecosystem-wide vision.
2. Introducing modern and efficient regulation that strengthens legal certainty and supports investment.
3. Balancing regulatory responsibilities and obligations among the multiple actors of the digital ecosystem.



Deployment of agile, efficient and modern infrastructure

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5. Providing a reference framework and adopting measures to encourage the shift from legacy to next-generation technologies.
6. Enabling flexible energy schemes and demand aggregation for digital infrastructure.
7. Modernising the approach to net neutrality to enable new services with different levels of latency, quality and reliability, thereby unlocking the socio-economic benefits of 5G.



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