ITUWTIS GENEVA2025

PERU'S SUBNATIONAL CONNECTIVITY STATE

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09/22/2025

Content

- Context
  - Global
  - Latam
- Peru’s national and subnational scope
  - Divides: connectivity and affordability
  - Evidence-based policies addressing the gaps
- Final pespectives

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WORLD: CONNECTED AND UNCONNECTED

ITU. *Facts and figures* (2024)

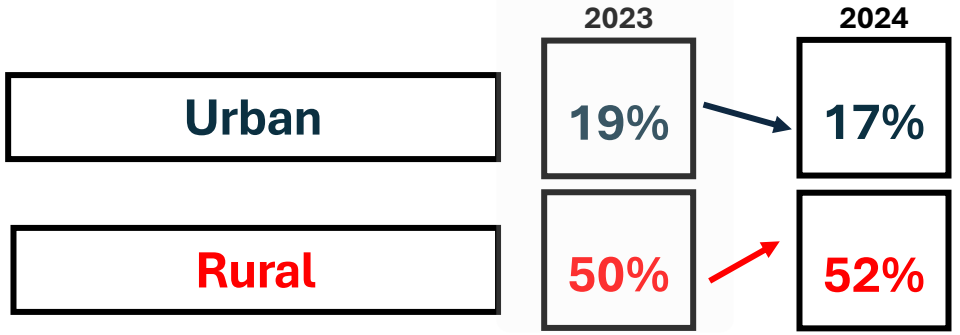
People online

5.5
billions
(68%)

People offline

2.6
billions
(32%)

People not using the Internet



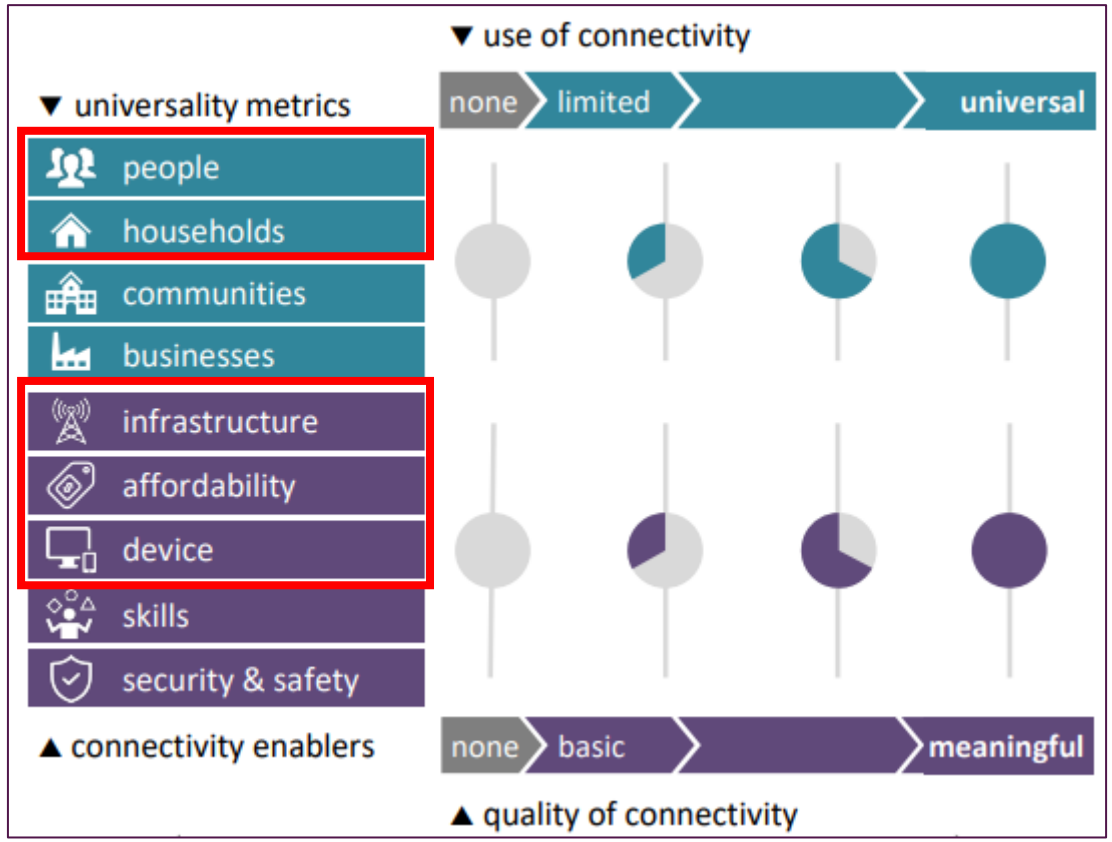
The rural and urban segmentatios is vital, but not enough

UNIVERSAL AND MEANINGFUL CONNECTIVITY PERSPECTIVE

ITU's UMC concept

The possibility for everyone to enjoy a safe, satisfying, enriching, productive, and affordable online experience.

UMC framework



ITU. Achieving universal and meaningful digital connectivity Setting a baseline and targets for 2030

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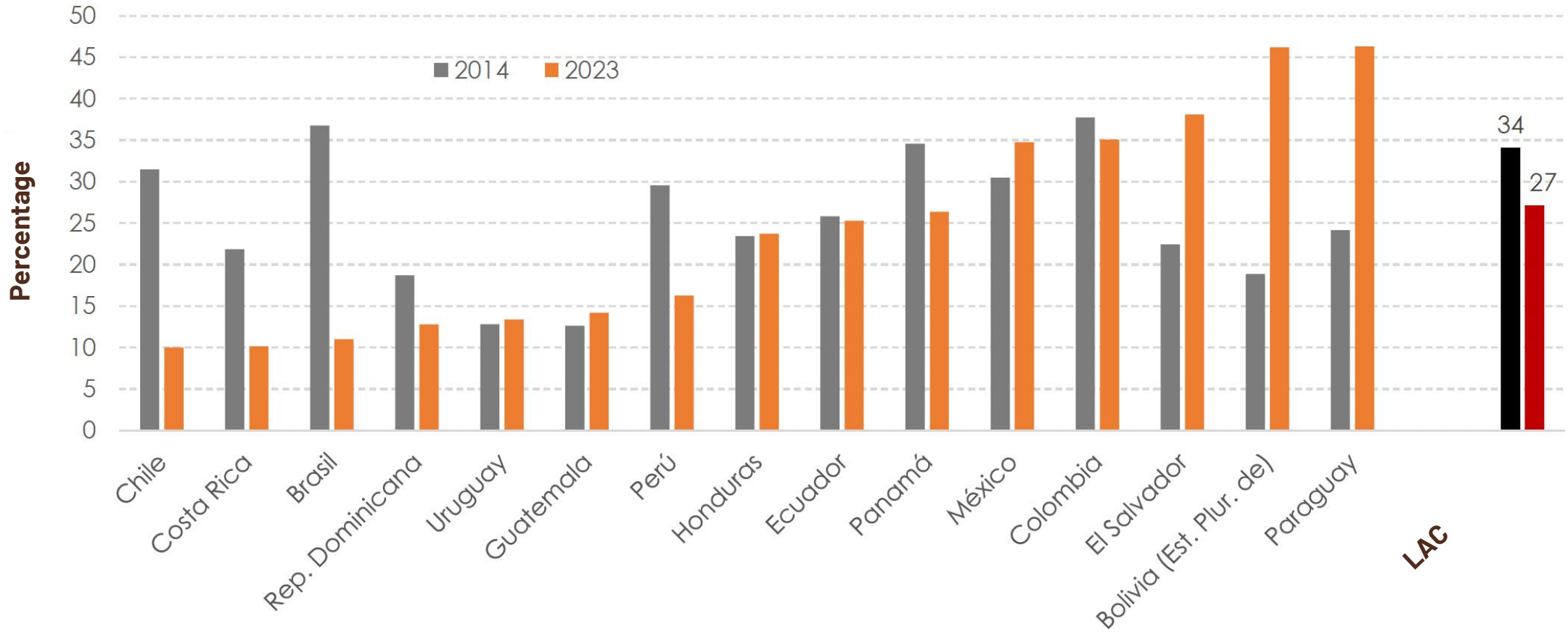
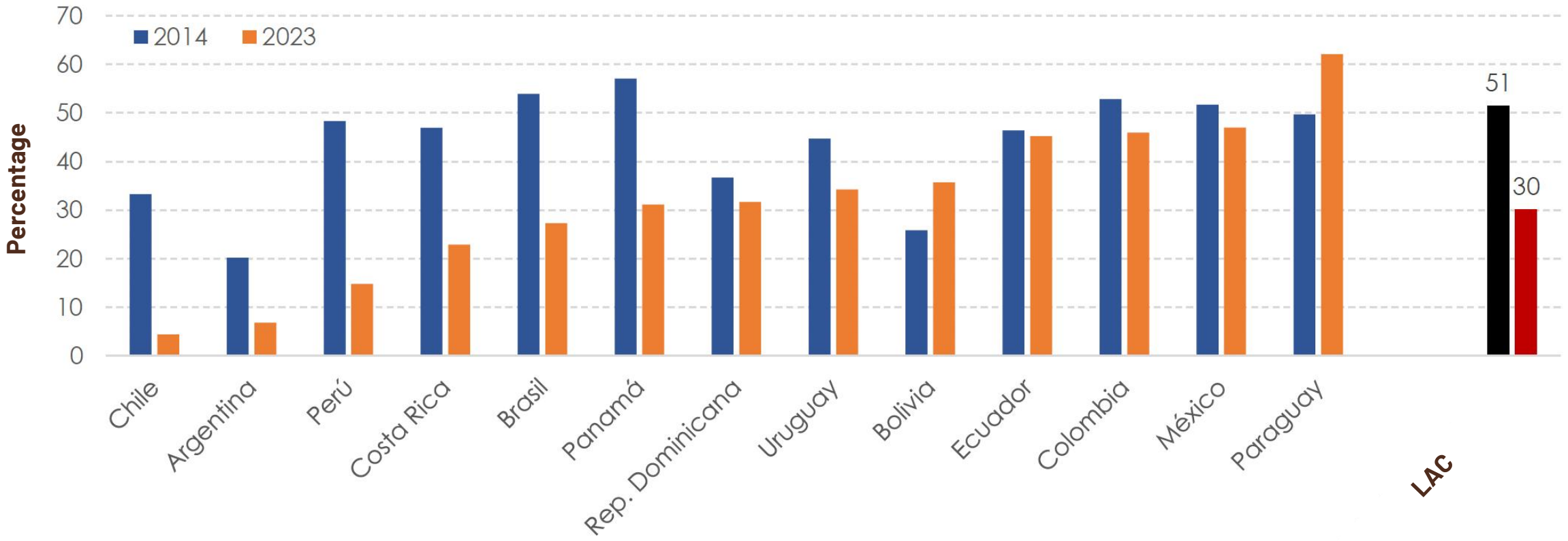
LATAM: CONNECTIVITY GAP BY TYPE OF RESIDENCE



CELAC (2025), BADEHOG

The difference between urban connected households and rural connected households is significant (27 p.p)

LATAM: CONNECTIVITY GAP BY INCOME



CELAC (2025), BADEHOG

The difference between Q5 quintil connected households and Q1 quintil connected households is more significant (30 p.p)

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PERU: TERRITORIAL ORGANIZATION

Geopolitical structure	#
Regions (or deparments)	25
Provincies	196
Distrits	1,891
Populated centers (or localities)	108,115

Internet statistics are determined at difFerent levels within the geopolitical structure.

PERU: PEOPLE NOT USING THE INTERNET

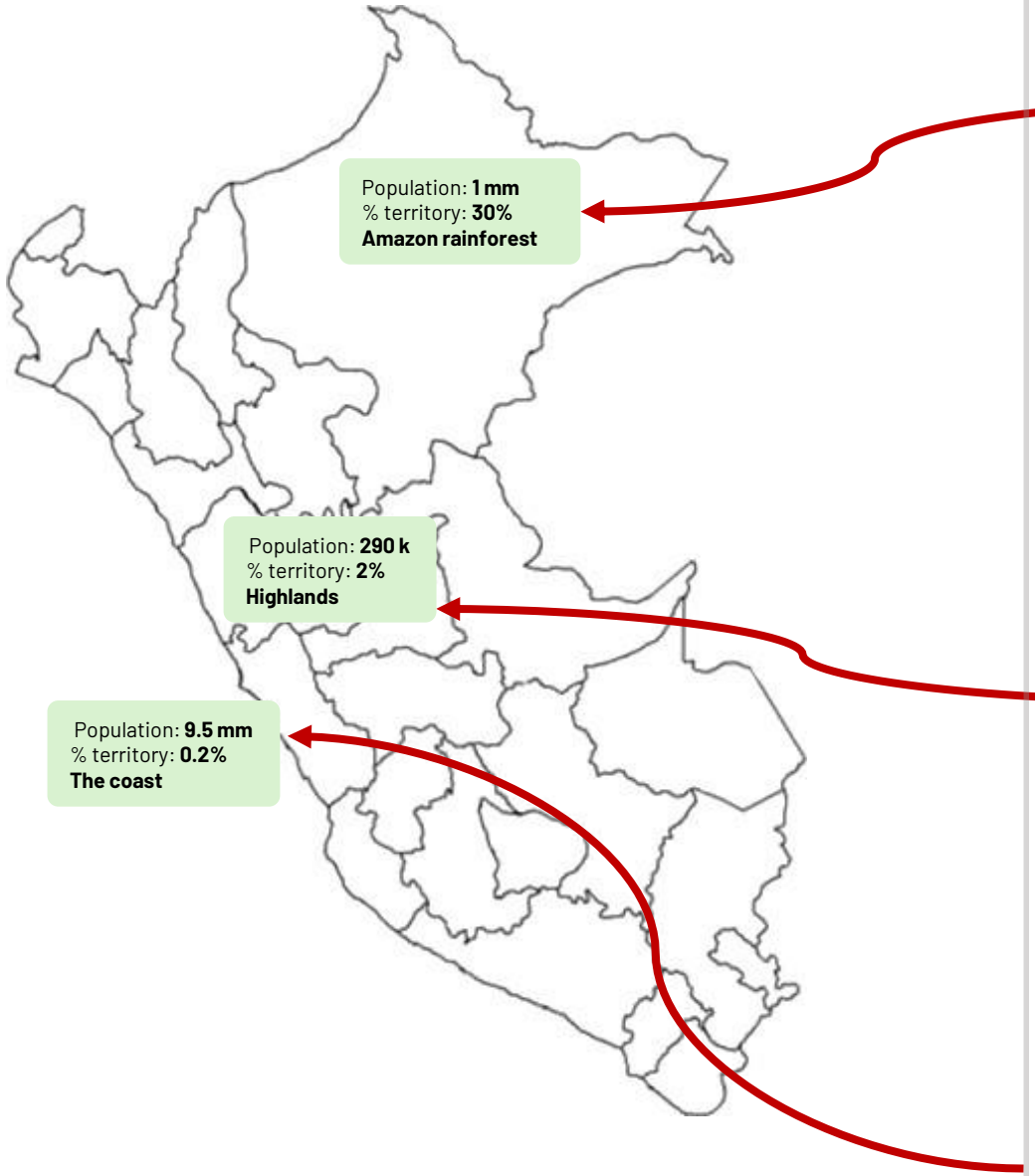
Area	2024
Metropolitan Lima	11,3 %
Urban	18,9 %
Rural	41,6 %
Total	**20,6 %**

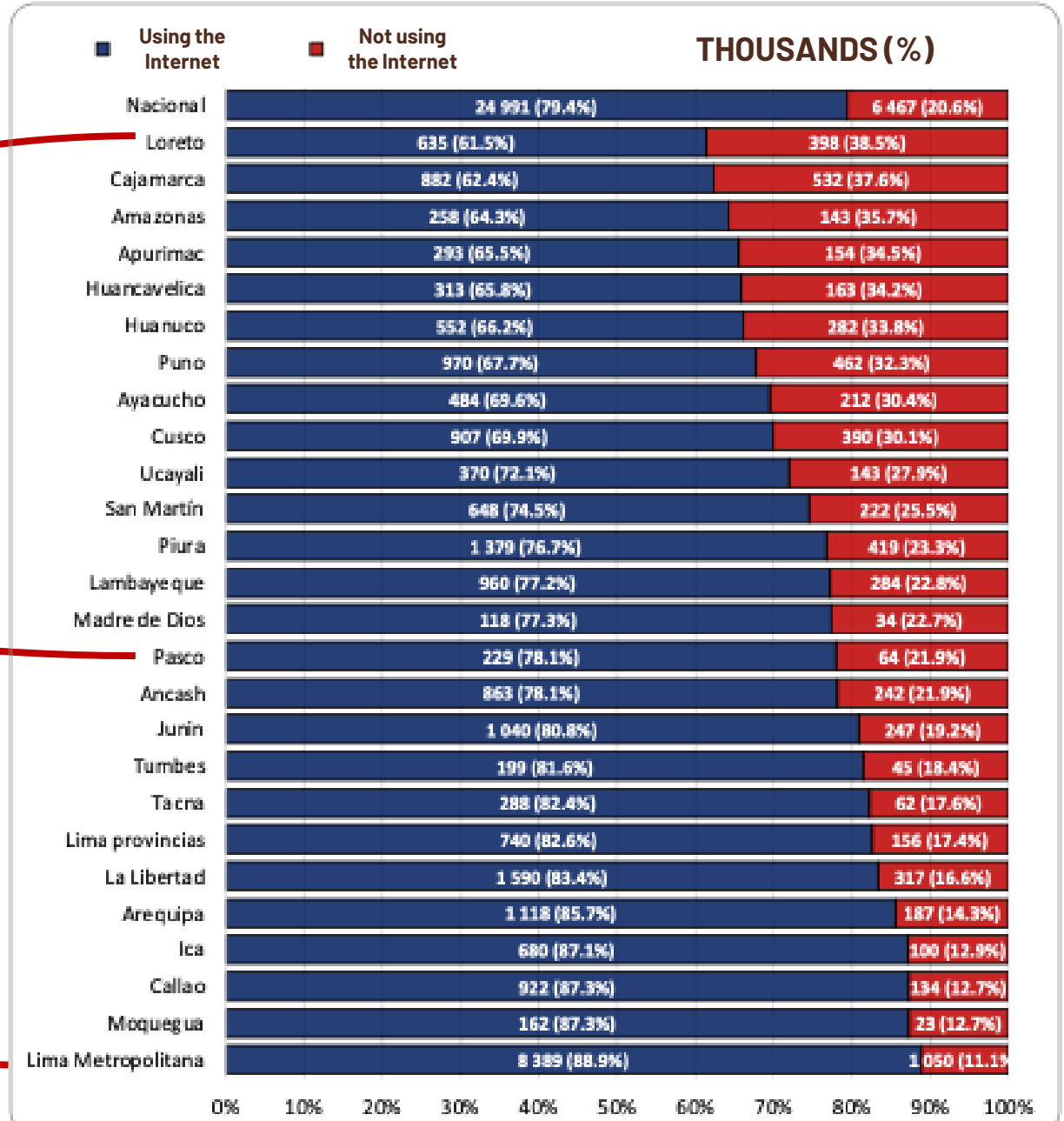
30

National Institute of Statistics and Informatics - National Household Survey.

- **Nearly 2 out of 10 citizens don't use the Internet.**
- **Significant disparity in rural areas: 30 percentage points, compared to Lima.**
- **Lima is not like the other urban cities.**

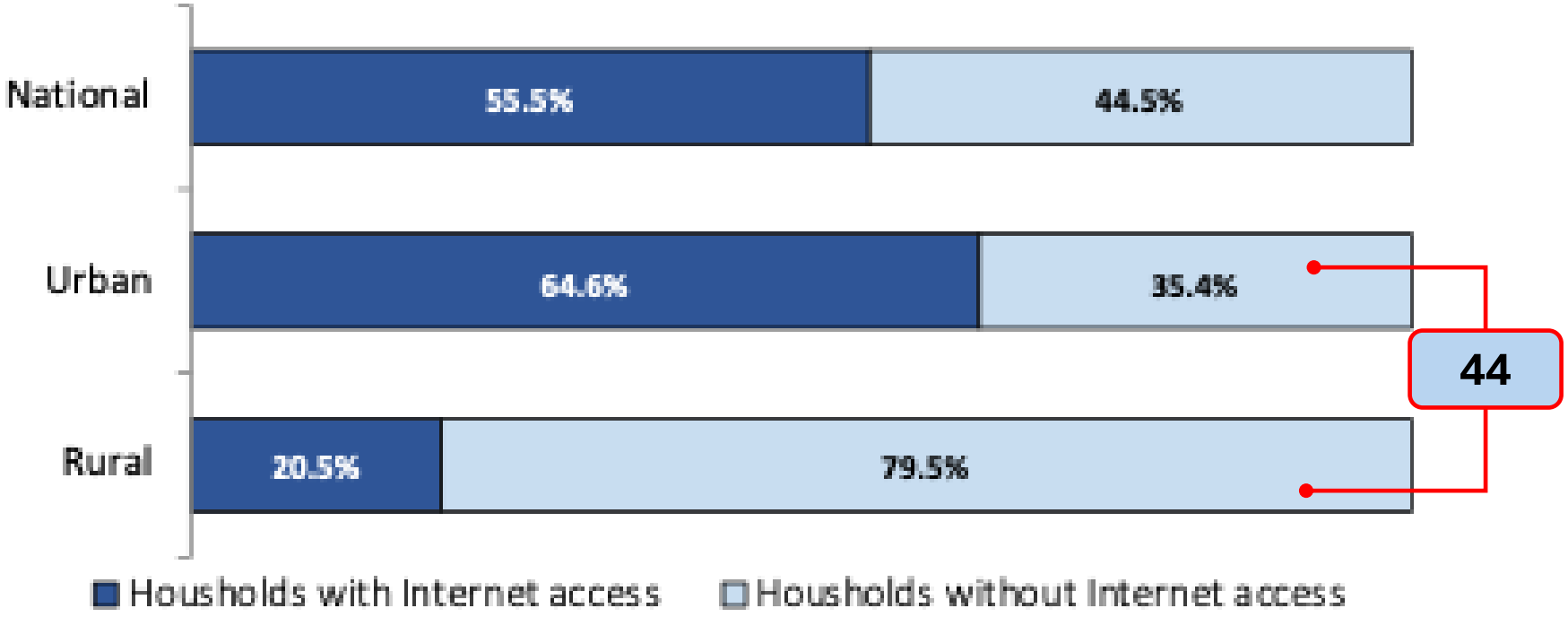
PERU: SUBNATIONAL USE OF THE INTERNET





Ministry of Transport and Communications (2025)

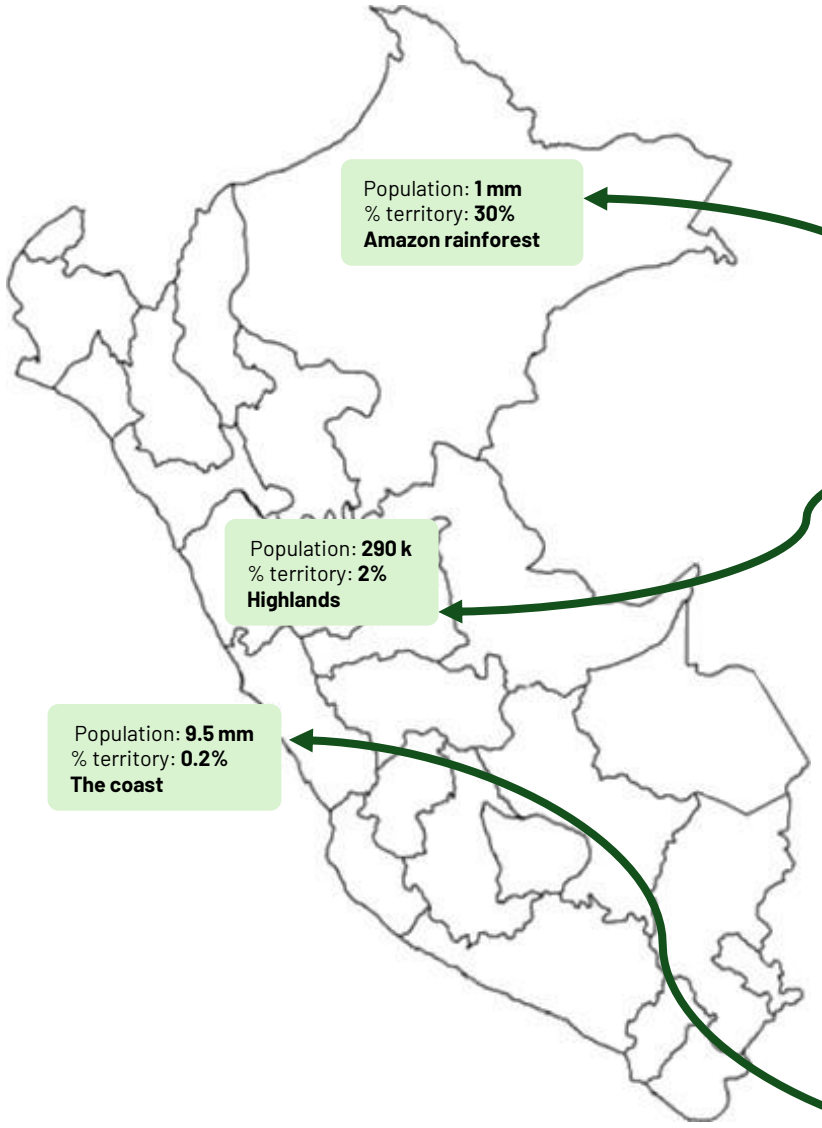
PERU: HOUSEHOLDS WITH INTERNET

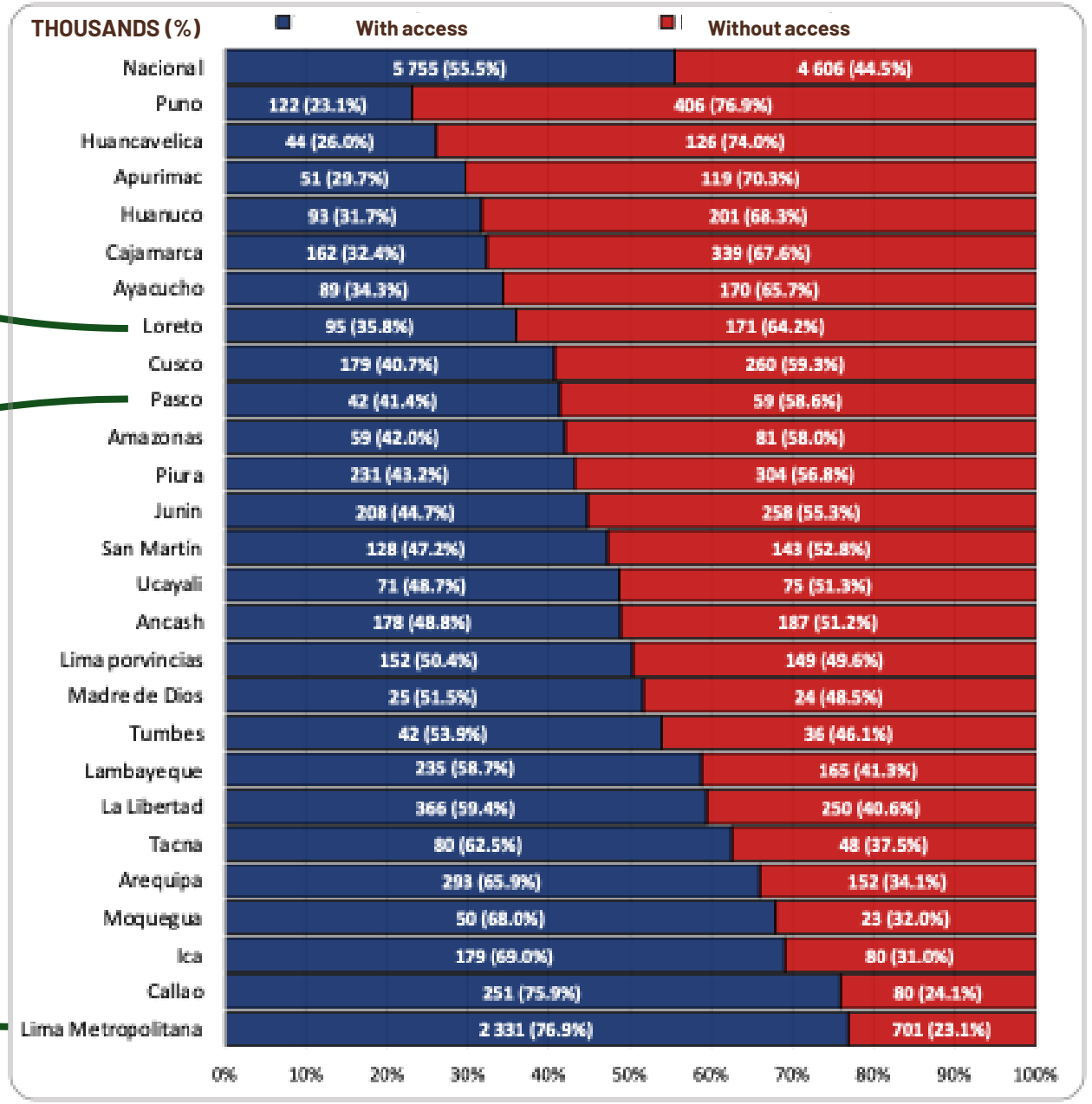


- **Great disparity in rural vs urban areas: 44 percentage points.**

National Institute of Statistics and Informatics - National Household Survey.

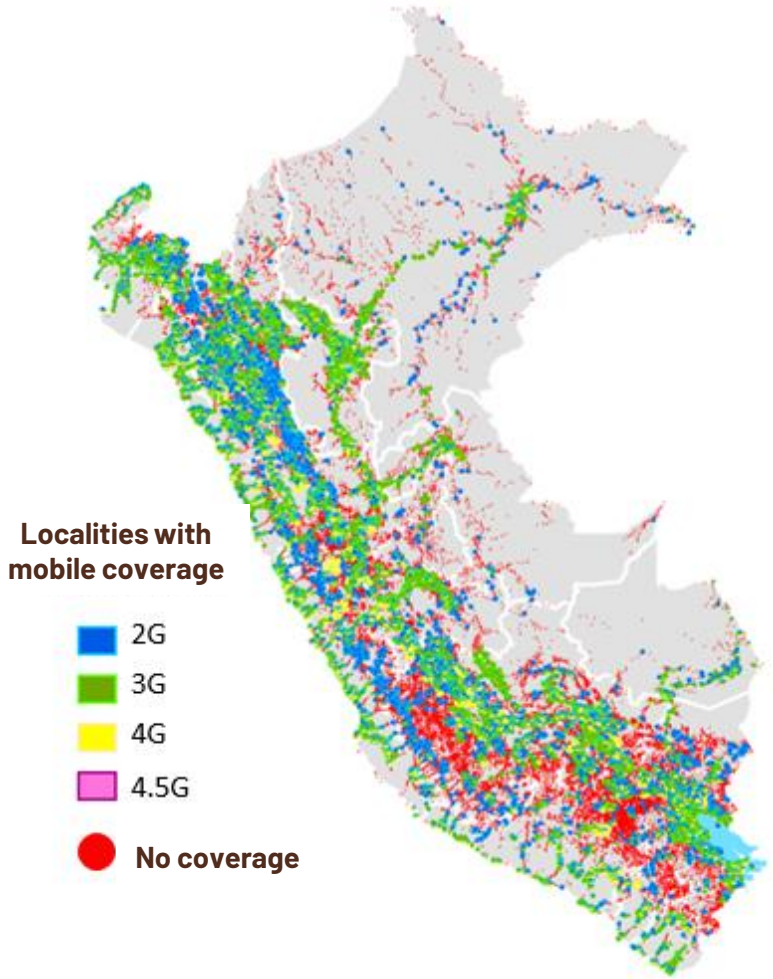
PERU: SUBNATIONAL HOUSEHOLDS INTERNET ACCESS

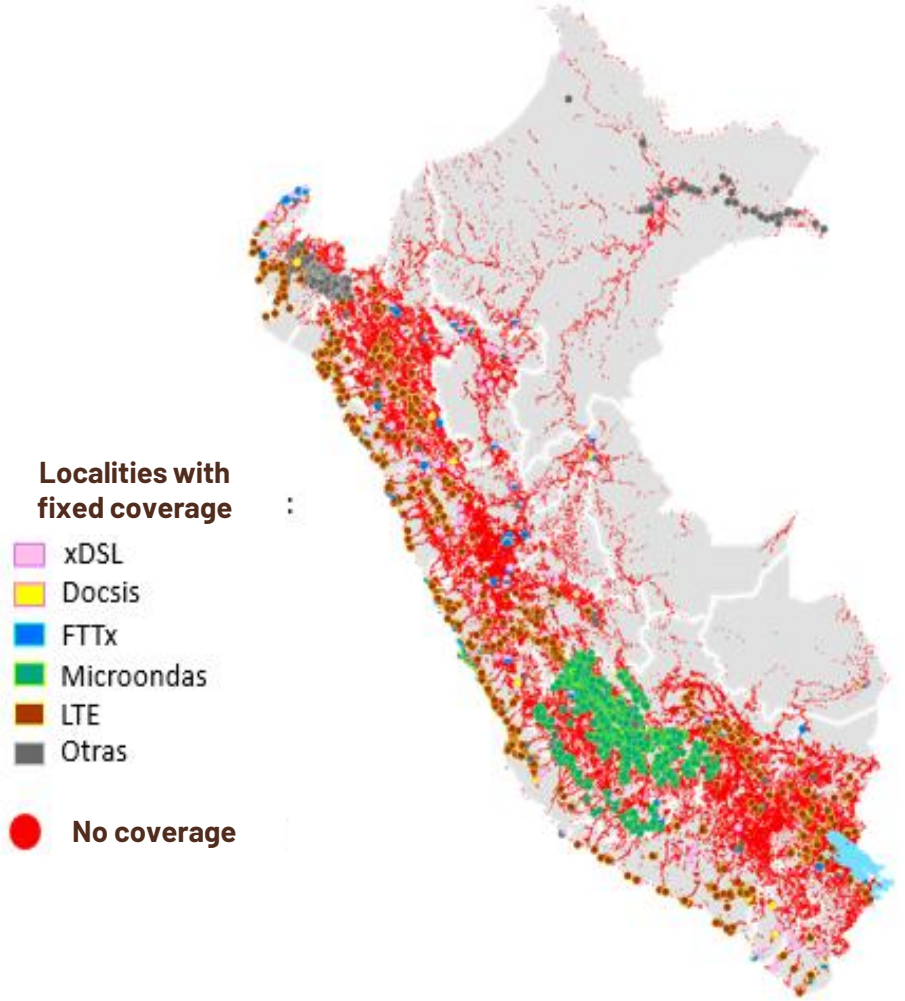




Ministry of Transport and Communications (2025)

PERU: INFRASTRUCTURE AND COVERAGE





Peru's Ministry of Transport and Communications

Significant disparities are evident between the Internet coverage by technologies in regions, mainly in the Fixed Internet (terrestrial) supply .

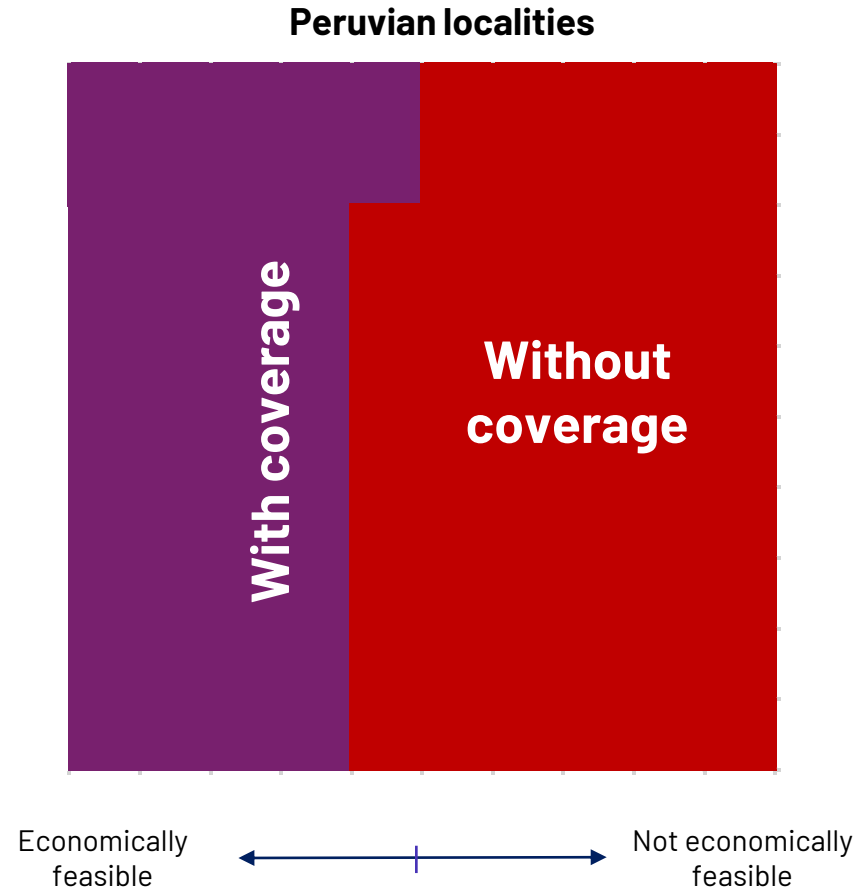
PERU: LOCALITIES WITH AND WITHOUT BROADBAND (UMC)

99,104

out of 108,000 locations have no reported coverage for 4G, 5G or FTTH telecommunications service.

(91,7%)

(MTC, 2025).

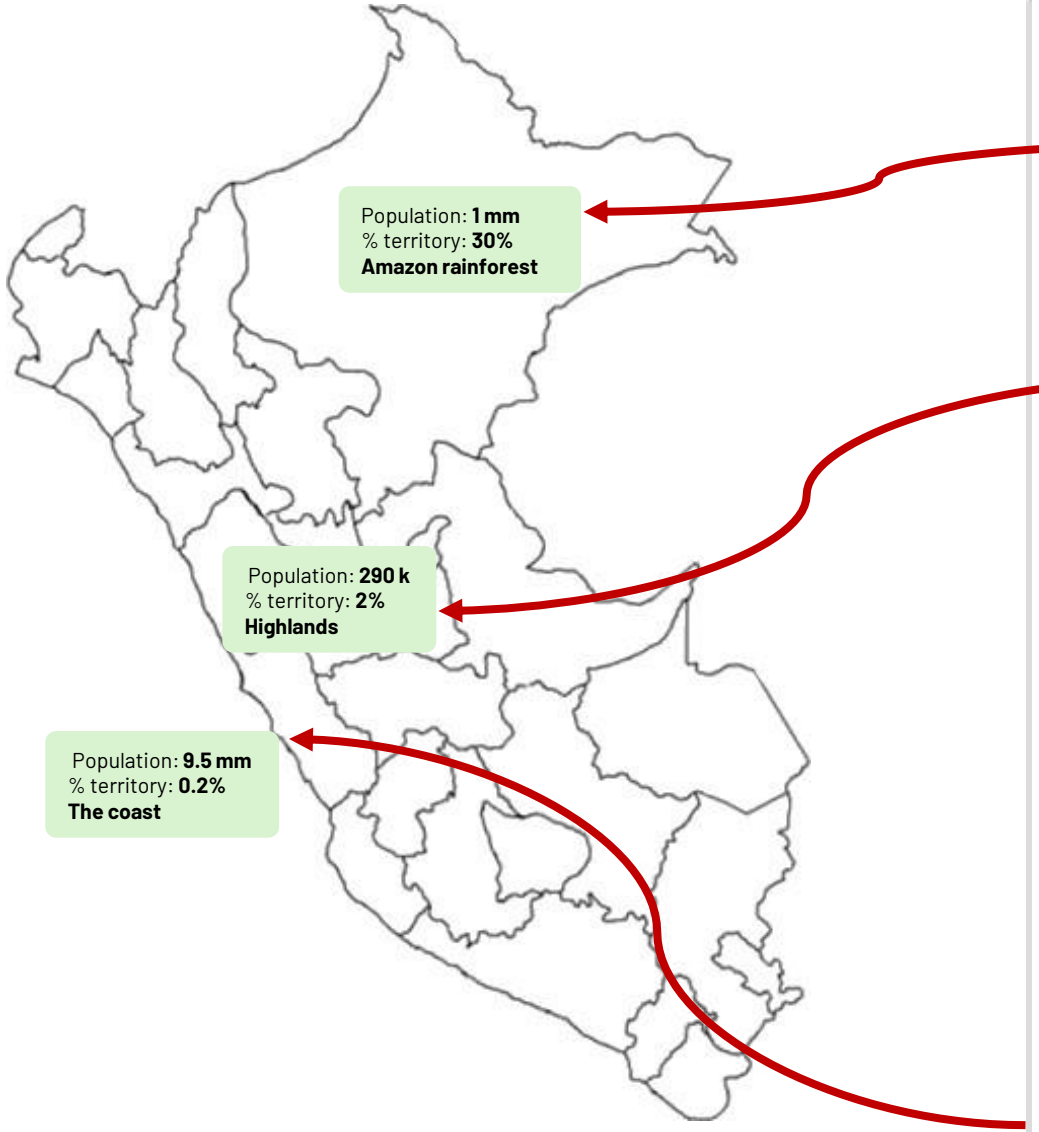


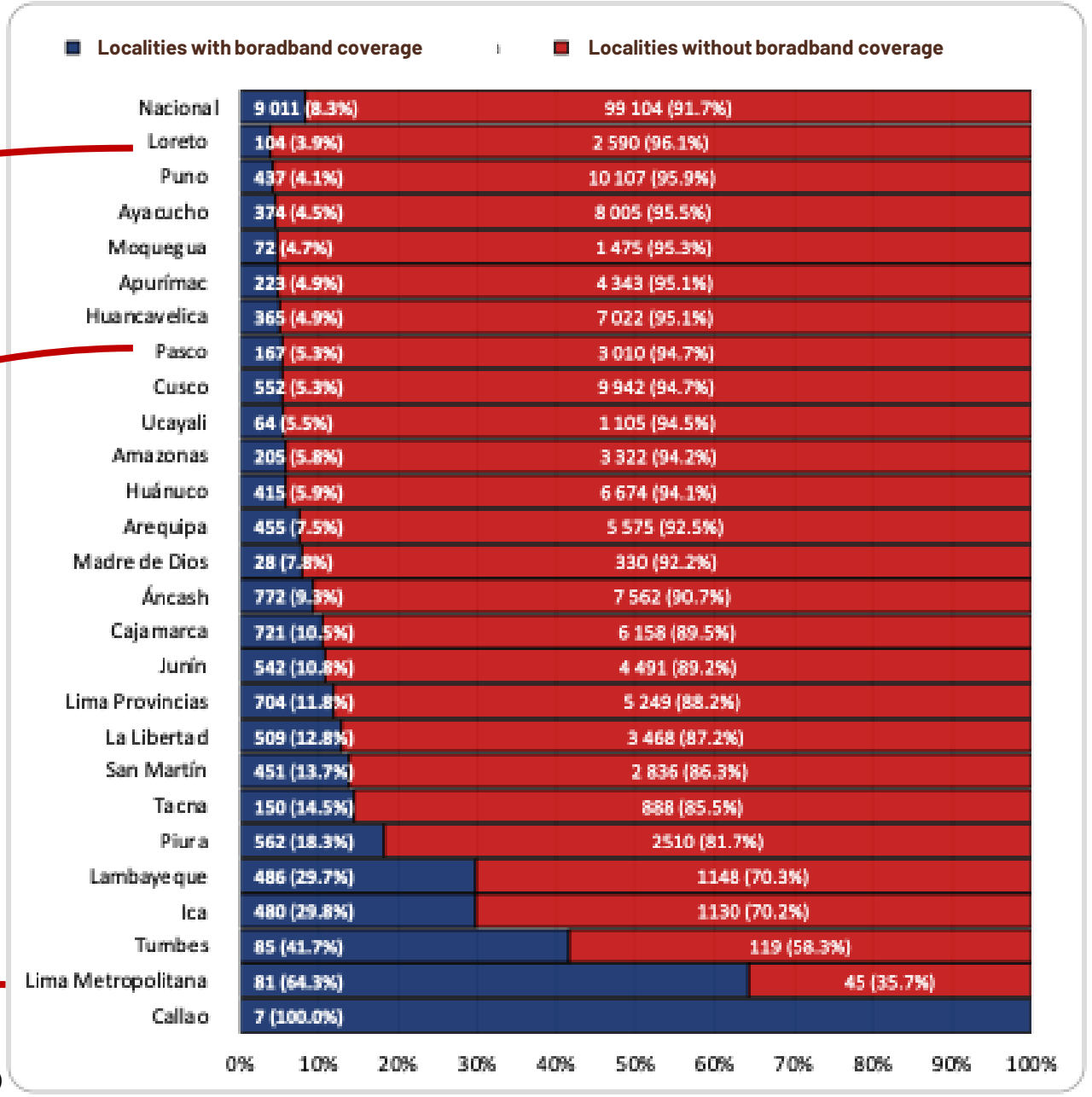
99.7%

of localities without coverage belongs to the rural area

(MTC, 2023).

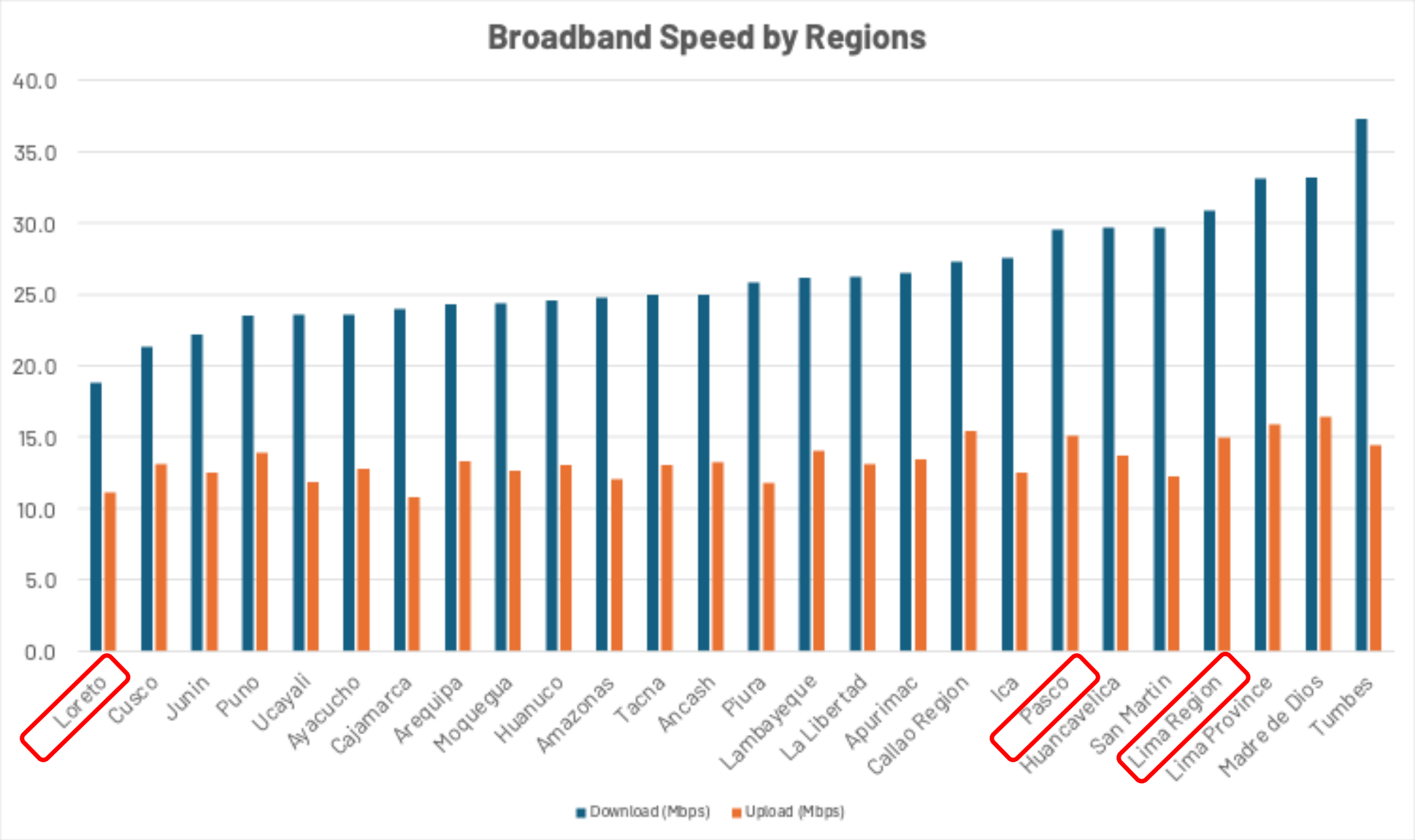
PERU: SUBNATIONAL BROADBAND COVERAGE





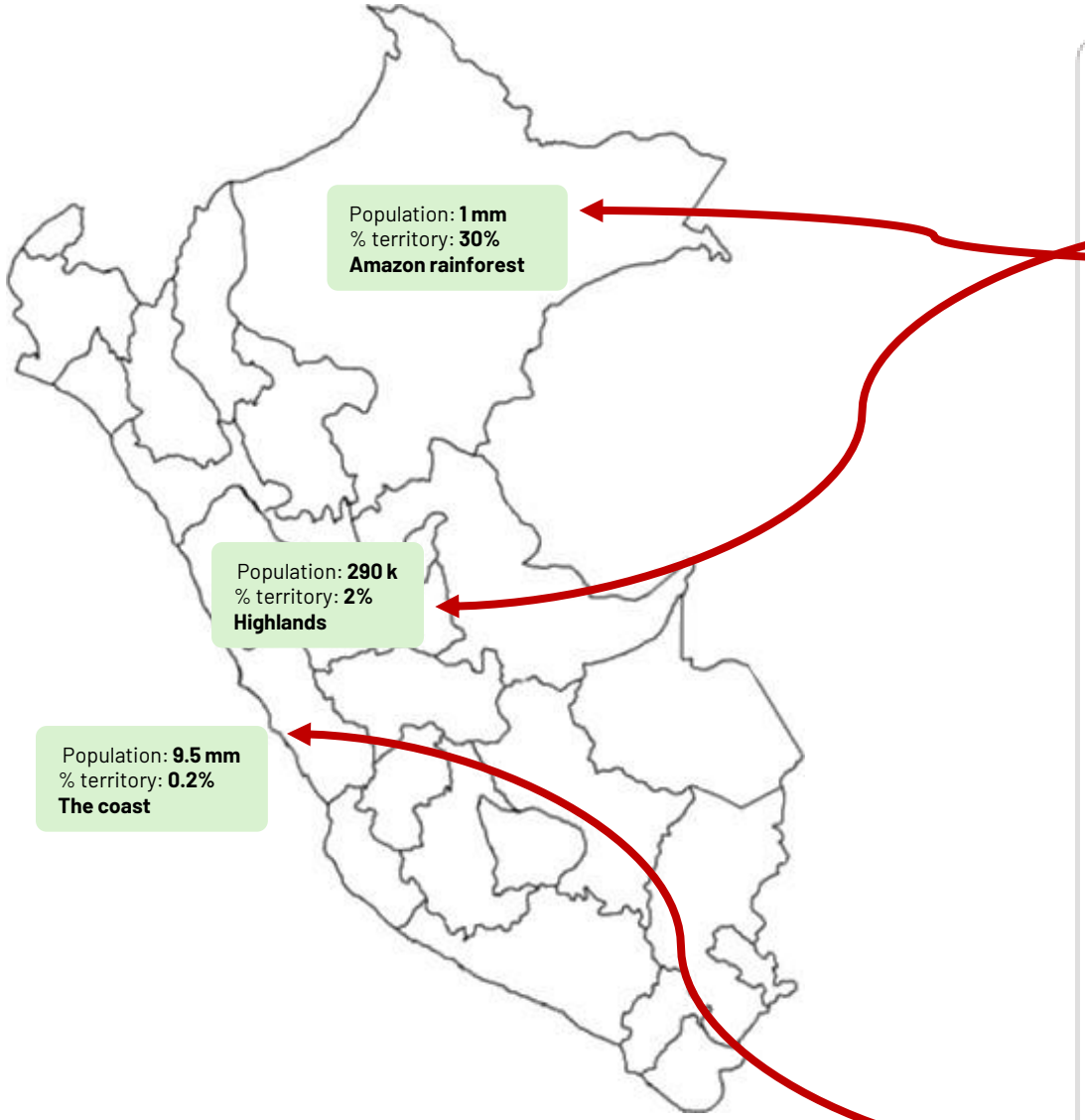
Ministry of Transport and Communications (2025)

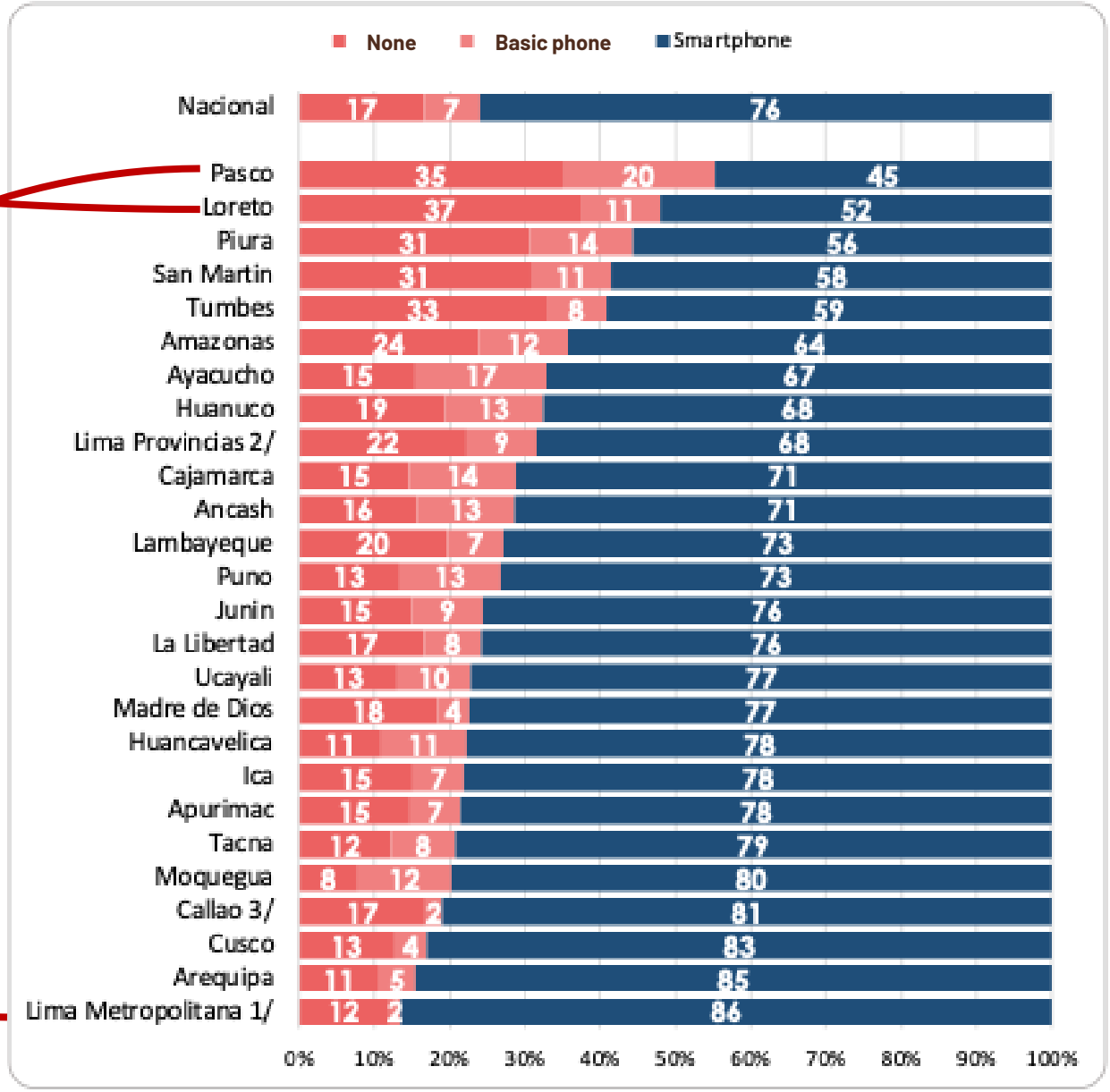
PERU: SUBNATIONAL BROADBAND SPEED



Ookla's special request

PERU: SUBNATIONAL DEVICES OWNERSHIP

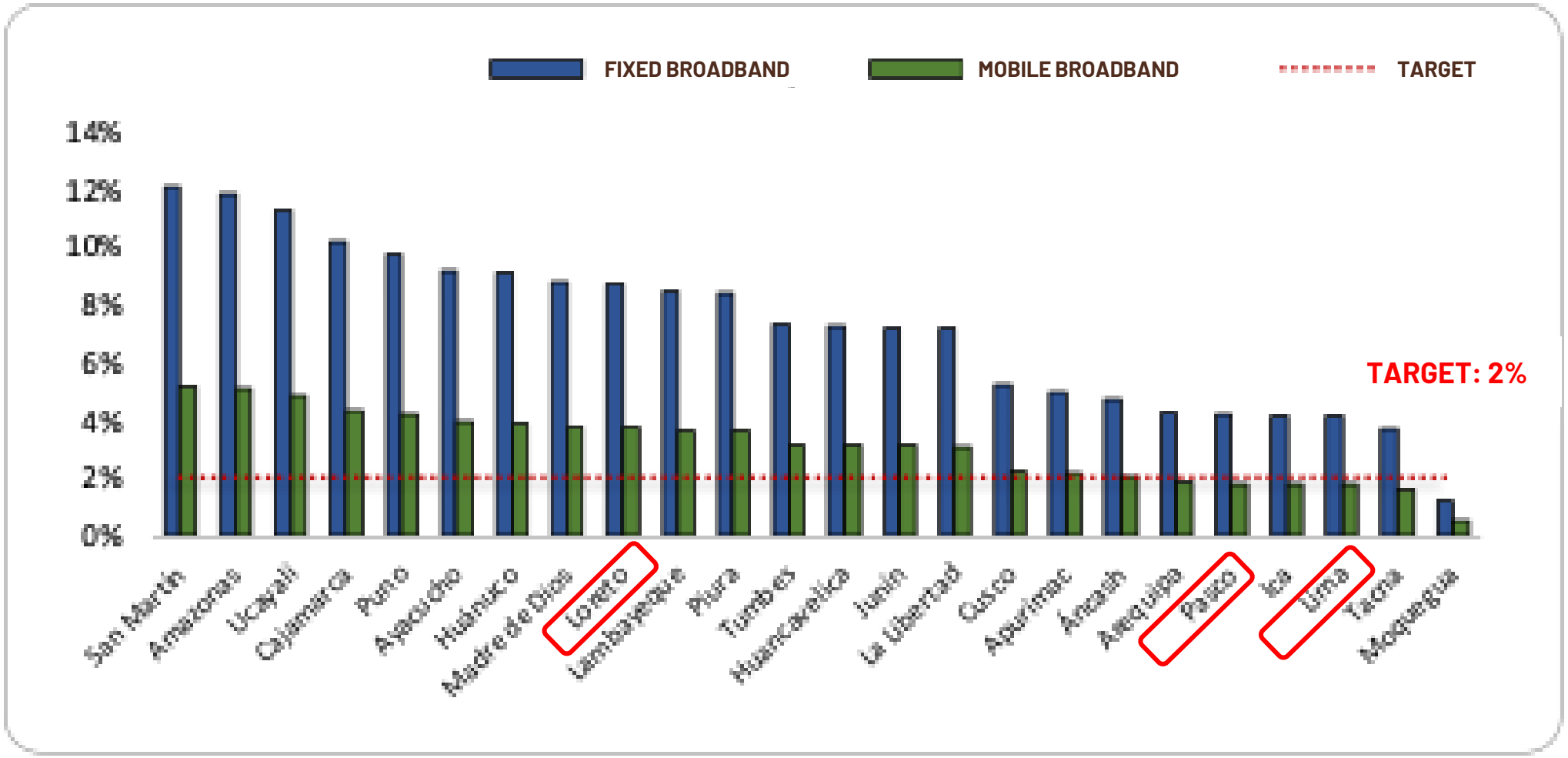




Ministry of Transport and Communications (2025)

PERU: SUBNATIONAL AFFORDABILITY OF BROADBAND BASKET

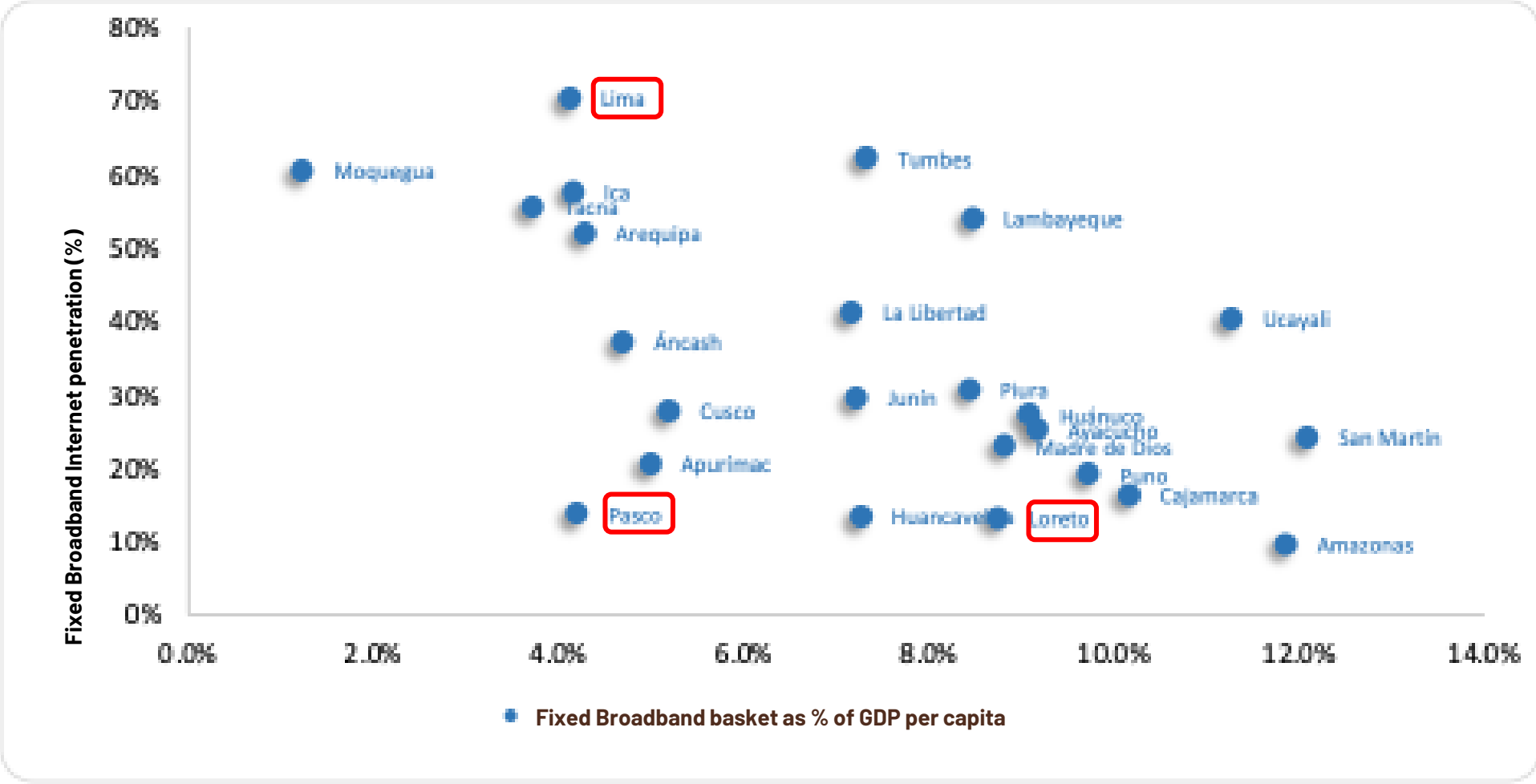
Broadband basket prices as a percentage of GDP per capita, Peru, 2024 (% of GDP per capita)



National Institute of Statistics and Informatics, Ministry of Transport and Communications (2025)

PERU: SUBNATIONAL AFFORDABILITY VS PENETRATION

Correlation between Fixed Broadband penetration and the Fixed broadband basket as % of GDP: the less affordable the basket in a region, the less penetration it has.



National Institute of Statistics and Informatics, Ministry of Transport and Communications (2025)

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PERU: FINANCIAL MODELS

Addressing the subnational gaps in Peru from a public sector perspective has two top-down channels:

Direct

The direct channel uses public funding for projects in the regions.

Indirect

The indirect channel promotes mandatory and incentive policies for private investment with focus in rural areas.

The National Telecommunication Program (PRONATEL) develops and executes projects to expand connectivity.

- 29 regional projects in its portfolio with investments exceeding USD 2.5 billion, benefiting nearly 11,000 localities.
- Digital Access Centers (CAD) and public Wi-Fi spaces (EPAD) programs.

National Telecommunication Program (2025)

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The indirect channel promotes mandatory and incentive policies for private investment with focus in rural areas.

- Recent spectrum autions connectivity obligations (5G in 2025, 4G in 2023).
- Fee (canon) per coverage mechanism.
- Infrastructure sharing regulation.
- Rural Infrastructure Mobile Operator (wholesale).
- Regulatory Sandbox underway

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FINAL PERSPECTIVES

- Peru has a vast territory. Its regions are very different from each other in general terms (population, area, etc.) and in Internet use or access as well.

- To apply the UMC perspective in Peru, a major effort to align data collection with ITU tools and a focus on subnational data availability are needed.

- Digital divides lead to data divides.

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