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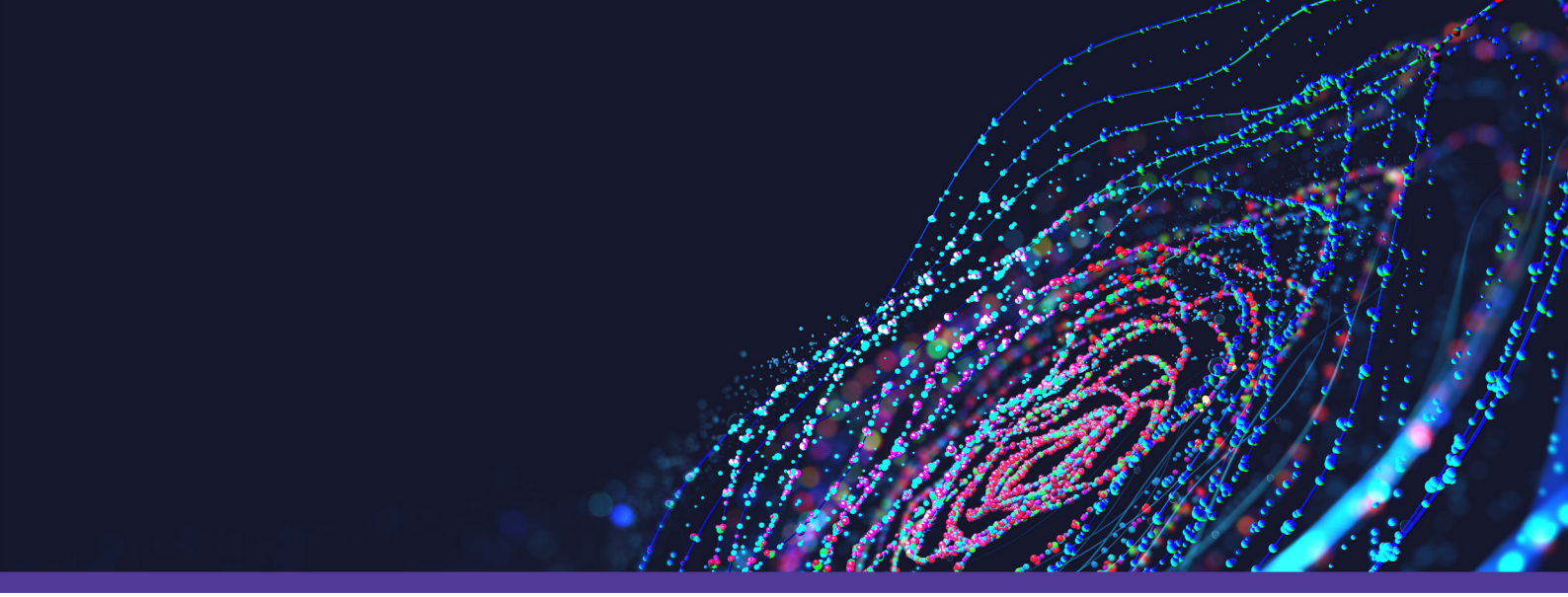

Foreword

The accelerated advance of artificial intelligence (AI) is reshaping the foundations of economic and social development, as well as global geopolitics. In this context, Latin America and the Caribbean faces structural challenges that we have termed "development traps": one of low capacity for growth; another of high inequality, low social mobility and weak social cohesion; and a third of limited institutional capacities and ineffective governance. These three traps are closely interrelated and mutually reinforcing, creating a vicious cycle of productive stagnation, social exclusion and institutional fragility.

Against this backdrop, digital transformation —and AI in particular— presents a strategic opportunity to break that cycle and drive the change needed in the economies and societies of the region. This process entails the dual challenge of strategically incorporating such emerging technologies to accelerate productive, inclusive and sustainable development, while ensuring their ethical and responsible use, in the public interest.

Harnessing digital transformation to overcome these traps requires the real and effective use of these technologies. This involves profound changes, with cross-cutting impacts on production systems, employment, social welfare and the quality of governance. Specifically, for digitalization to be truly transformative, it must be considered an essential component of national and subnational development agendas, including that of productive development policies.

In this regard, diagnostic, monitoring and analytical tools are indispensable for guiding the formulation of innovative, timely and evidence-based public policies capable of leveraging the transformative potential of digital technologies in general, and AI in particular.

The Latin American Artificial Intelligence Index (ILIA), established in 2023 in collaboration with the National Centre for Artificial Intelligence (CENIA) of Chile and with the support of various academic, public and private organizations, addresses this imperative. It represents a pioneering and systematic effort to measure AI progress in 19 countries of the region, complementing initiatives such as the Digital Development Observatory of the Economic Commission for Latin America and the Caribbean (ECLAC), which since 2024 has produced, compiled and analysed more than 85 indicators across 12 key areas for digital transformation.

This analytical tool, unique in its kind in Latin America and the Caribbean, can be used to assess, compare and understand the development of national AI ecosystems across three key dimensions: enabling factors; research, development and adoption; and governance. The scope of ILIA 2025, the third edition of the index, has been expanded significantly to incorporate over 100 subindicators and thus more accurately capture existing capacities, structural gaps and strategic opportunities.

This detailed perspective is particularly relevant at a time when assessments reveal both the region's potential and its challenges. Indeed, a recent ECLAC study shows that Latin America and the Caribbean invests four times less in AI than would be expected given its weight in the global economy, significantly limiting the ability to harness its transformative potential.

Likewise, ILIA 2025 is fully aligned with the national and international priorities defined by countries in the Digital Agenda for Latin America and the Caribbean (eLAC2026), the Global Digital Compact adopted by the General Assembly of the United Nations in 2024 and the 2030 Agenda for Sustainable Development. Within this framework, the index serves as a key tool for measuring progress with respect to these agendas, by providing a measurement system that links advances in AI to the region's economic, social and environmental goals.

At a time when growth in Latin America and the Caribbean is at the lowest levels recorded in the past seven decades (an annual average of 1% between 2015 and 2024) —even lower than during the "lost decade" of the 1980s—AI is not merely a technological tool, but also a strategic opportunity for development. Its adoption can contribute, for example, to designing new productive strategies; democratizing access to education, health and other public services; expanding social protection; closing gender gaps; reducing environmental pollution; promoting greener growth and strengthening government transparency and efficiency.

In this context, ECLAC is confident that ILIA 2025 will become a key benchmark for guiding informed decisions and evaluating public policies that ensure AI enables more productive, inclusive and sustainable development in the region. Only in this way will it be possible to fully harness the potential of digitalization and advance towards a more prosperous and equitable future for Latin America and the Caribbean.

José Manuel Salazar-Xirinachs
Executive Secretary
Economic Commission for
Latin America and the Caribbean (ECLAC)

We are pleased to present the third edition of the Latin American Artificial Intelligence Index (ILIA). This version strengthens the instrument by incorporating mechanisms to track the more dynamic and granular phenomena of AI in Latin America and the Caribbean. The first edition of ILIA, published in 2023, established a baseline on the region's level of preparedness for the growing AI revolution by quantifying enabling factors. The second edition, released in 2024, expanded the coverage of countries and indicators and began the transition from measuring enabling factors to assessing progress in AI use. In this third edition, ILIA deepens its focus on adoption and human capital—both enabling and advanced—viewing them as reliable signals of the relative progress of economies and of AI's role as a differentiating factor for development in the region.

Among the main findings of this edition, the evidence reinforces what was observed in 2024: there is great interest and enthusiasm for AI across the region, reflected in the development of national AI policies. However, it is concerning that this enthusiasm is still not matched by more decisive actions and investments commensurate with the urgency of this technological moment. Despite clear evidence of AI's favorable impact on productivity, employment, quality of life, and the creation of new businesses, no significant trend changes are yet visible.

Fortunately, Brazil and Costa Rica are beginning to reverse this inertia, with significant increases in AI commitment and investment. Even so, no country surpasses the global average of AI investment relative to GDP per capita, and the regional average is six times below that threshold. The region accounts for 6.6% of global GDP and 8.8% of the world's population, yet just 1.12% of global AI investment. Additionally, the relative gap in AI talent penetration compared with the global average has widened more rapidly since 2022, leading to an accelerated outflow of talent. While the rest of the world moves toward openness, interoperability, and data availability, the region advances slowly and timidly, often prioritizing regulatory debates that may hinder the development of technology at the service of people.

In light of recent lessons from generative AI, this edition adopts a more critical perspective on robustness and reliability, highlighting the need to rigorously evaluate reasoning stability, reproducibility of results, security, and alignment with human objectives. Consequently, we propose complementing adoption indicators with metrics on quality of use: governance and data openness practices, counterfactual and sensitivity testing of models, traceability and explainability mechanisms, and interoperability standards. This perspective seeks to improve public and private decision-making, avoiding optimistic extrapolations not supported by evidence.

Not all the news is negative. The region shows improvements in basic research ecosystems, which are the foundation for other AI-related structures, reflected in the increase in doctoral and master's programs across most economies. Internet penetration is consolidating, enabling the rapid growth of AI application use, where the region represents between 15% and 20% of the global market. Investment in sovereign and private data centers of various scales has been strongly reactivated this year in the region, with public investments totaling nearly USD 200 million and private announcements exceeding USD 8 billion over the next ten years. These are undoubtedly positive developments that renew hope in the opportunities ahead.

This edition emphasizes adoption and, complementarily, collaboration. The cases presented are the result of transnational and interdisciplinary collaborations. Without those ties, none of the projects described would have existed: from mass training programs for SMEs and public servants, to the development of the region's first major open language model; from a race against the clock to safeguard judicial records during a flood, to the use of AI to reduce motorists' waiting times by millions of hours annually. These examples serve as a beacon, indicating that the bright future of AI in the region requires a formula based on collaboration—one that does not compete for talent, but rather shares it.

We hope this new edition of ILIA will serve as a beacon to guide regional dialogue and decision-making, helping to build a virtuous AI ecosystem for the region and all its citizens.

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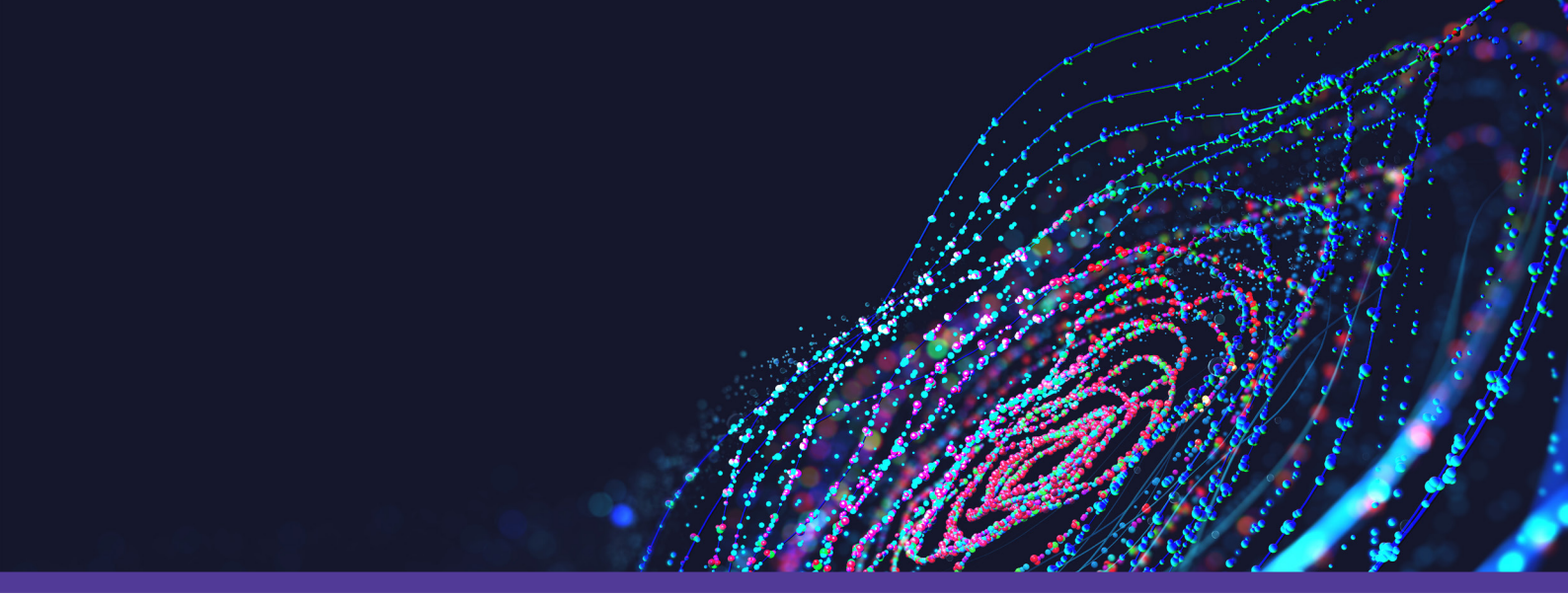


Executive Summary

Latin America and the Caribbean are at a critical juncture. The region faces persistent traps that hinder development: low economic growth capacity, high inequality and limited social mobility, and weak institutional capabilities. In this context, artificial intelligence (AI) emerges as a strategic tool to foster sustainable productive development, diversify the economy, reduce social gaps, and strengthen governance.

The Latin American Artificial Intelligence Index (ILIA) is a pioneering effort to systematically measure AI progress in 19 countries of the region. ILIA seeks not only to monitor levels of readiness, adoption, and governance, but also to disseminate good practices and to serve as an instrument to guide public policies aimed at integrating AI into countries' development models in a comprehensive manner.

The Index is structured around three dimensions: Enabling Factors (digital infrastructure, human talent, and data), Research, Development and Adoption, and Governance. Drawing on more than one hundred sub-indicators, ILIA 2025 provides a detailed overview of progress, gaps, and strategic opportunities in the deployment of AI in Latin America and the Caribbean.

Regional Outlook

The results reflect a heterogeneous scenario: while some countries are consolidating leadership positions, others are progressing at an intermediate pace or remain in early stages. This diversity reveals AI's potential as a driver of development, but also the risk of digital fragmentation that reproduces historical inequalities.

The Index groups countries into three categories according to their level of maturity:

- **Pioneers:** scoring above 60 points, these countries stand out for efforts in technological infrastructure, specialized talent, research, innovation, and governance.
- **Adopters:** with scores between 35 and 60, these countries show intermediate progress but still face critical gaps restricting AI development and adoption, particularly in research and innovation capabilities.
- **Explorers:** scoring below 35 points, these countries have incipient ecosystems and limited capacity to deploy AI.

Eleven key findings from ILIA 2025

i) **The rise of late adopters.** Ecuador, Costa Rica, the Dominican Republic and Guatemala are showing accelerated improvements in connectivity, talent, and AI strategies, narrowing the gap with leading countries and opening new opportunities for regional cooperation.

ii) **Open source: an opportunity for Latin America and the Caribbean.** The strong performance of Honduras, El Salvador and Cuba in open-source software production confirms that this model offers a strategic pathway for developing local solutions, fostering regional collaboration and collective learning, and promoting algorithmic transparency.

iii) **Plenty of data, little availability.** The region generates large volumes of information, but openness and standardization remain limited. This restricts open science, reduces transparency, and hinders the development of local AI solutions.

iv) **Human talent: widespread literacy, limited specialization.** AI literacy rates double those of professional training and quadruple those of specialized talent. While school programmes and postgraduate courses are expanding, a bottleneck in advanced training limits the region's ability to produce its own solutions.

v) **Talent and infrastructure for digital sovereignty.** Brazil concentrates more than 90 per cent of the region's high-performance computing capacity. Although Uruguay, Costa Rica and Colombia perform better on a per-capita basis in terms of Graphics Processing Units (GPUs), more than half of the countries lack critical infrastructure, reinforcing asymmetries. Moreover, 13 out of 19 countries do not integrate early AI skills into school curricula and 11 do not offer AI doctoral programmes. Without strengthening endogenous capacities, the region risks generating AI solutions that are biased and have low local relevance.

vi) **Generative AI: a gateway to democratization.** Generative AI has democratized access and accelerated adoption thanks to its low entry barriers and user-friendly interfaces that allow non-experts to use advanced models. Countries such as Chile, Costa Rica, Peru, Uruguay, Panama and the Dominican Republic stand out in usage, and the region already ranks third worldwide in generative AI application downloads (15–20 per cent). This accessibility acts as a catalyst and, together with software development and open source, offsets computing deficits, opening opportunities across the region.

vii) **AI and citizenship participation: a missed paradigm shift.** While AI could revolutionize digital democracy, its use in most countries remains limited to informational chatbots, rather than tools for consultation, accountability, or public policy co-creation. Colombia, Mexico and Peru show some progress, but eight countries report no applications.

viii) **Limited and concentrated research.** Brazil and Mexico account for 68 per cent of active AI researchers and—together with Colombia, Chile, and Argentina—concentrate 90% of publications. Only seven countries participate in top-tier international conferences, mainly Chile and Brazil. Limited presence in high-impact academic forums reduces visibility and knowledge transfer; overall academic activity remains lagging and needs greater attention in most countries.

ix) **AI governance: many plans, little action.** Nine countries have national AI strategies, but only a few have allocated budgets, defined implementation plans, or established impact indicators. Without execution mechanisms, these strategies risk remaining mere statements. At the same time, while global trends advance in data openness and interoperability, the region progresses slowly, focusing mainly on regulatory and ethical debates. The challenge is to balance regulation with development-oriented policies and effective implementation, ensuring AI generates value without stifling innovation.

x) **Sustainability: an urgent call.** Only four countries (Brazil, Chile, Colombia and Mexico) have robust data centre industries, and just one in five centres meets international sustainability standards. Most AI and digitalization policies overlook environmental impacts, which may conflict with the region's environmental sustainability objectives.

xi) **AI entrepreneurship: an opportunity for the region.** The 19 ILIA countries account for only 1.12% of global AI investment and have unicorn companies in just six countries. Nevertheless, ILIA shows that a complex production structure is not required to foster local AI enterprises and expand AI use in the productive sector. Favorable innovation and entrepreneurship environments, investment, and productive-development policies can ignite innovative dynamics.

Trends by Dimension

Enabling Factors

- Connectivity is improving, but 11 out of 19 countries still score below 50 in digital infrastructure.
- The inclusion of AI in school curricula has grown from 2 to 6 countries, an important step towards building endogenous capacities and greater social equity.
- Costa Rica leads in professional AI skills, demonstrating that well-designed talent policies can transform competitiveness even in medium-sized economies.
- Brazil concentrates computing capacity, while Uruguay and Colombia stand out in GPUs per-capita, opening the door to more distributed development.
- Persistent digital divides limit equitable participation in the digital economy.

Research, Development and Adoption

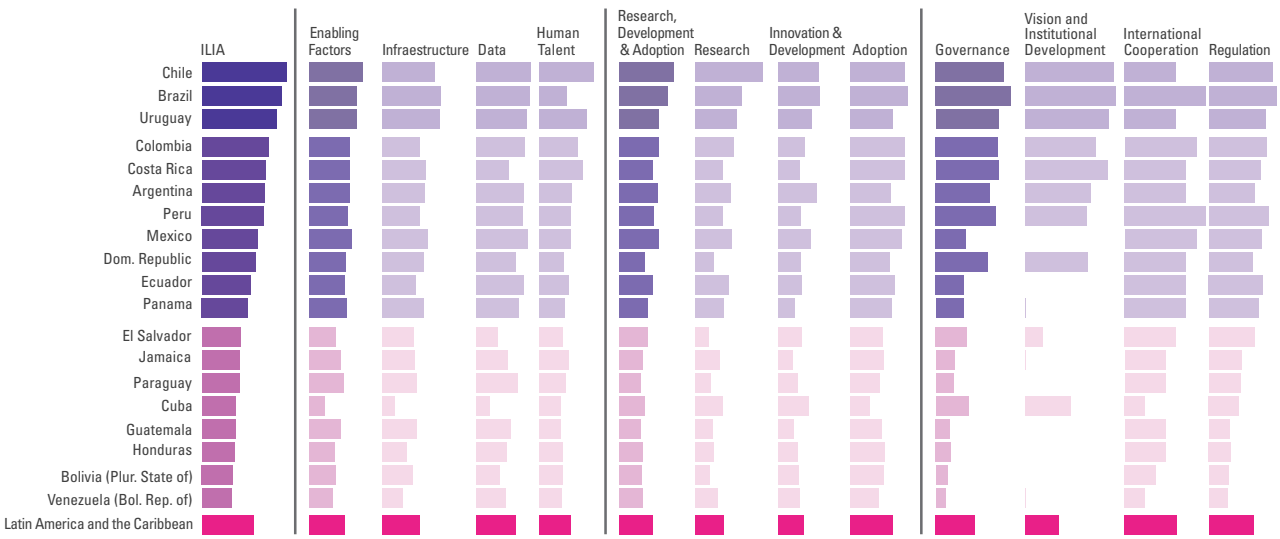
- Women's participation in AI research grew from 19.8% to 23.6%, still far from parity.
- Peru leads in AI usage intensity, showing that adoption can expand beyond the complexity of countries' productive structures.

- Innovation and investment in AI remain concentrated in few countries, with low global weight (1.12% by ILIA countries relative to global investment).
- Generative AI is emerging as a cross-cutting adoption catalyst, particularly in education, public services, and micro-, small- and medium-sized enterprises (MSMEs).
- Open source appears as fertile ground for regional collaboration, cost reduction, and creation of local and inclusive solutions.

Governance

- Two realities coexist: countries with consolidated strategies (Brazil, Chile, Uruguay) and others without defined roadmaps.
- Most national strategies lack effective implementation mechanisms.
- Regional participation in international standard-setting bodies remains limited, constraining influence over global rules.
- In cybersecurity and data protection, legal progress has been made, but technical capacities remain insufficient.
- Sustainability continues to be absent as a guiding principle of AI policies, despite its growing environmental impacts.

Figure 1
ILIA 2025: total score by dimension and sub-dimensions
(Index, base 100)



Source: Own elaboration.

Main Conclusions

ILIA 2025 highlights significant AI progress in the region, generating opportunities for productivity, inclusion and sustainability. Unlike previous technological revolutions, its adoption does not depend on complex production structures, enabling countries of different sizes and economic profiles to benefit.

The challenge is to articulate digitalization policies with productive development policies so that AI translates into productivity, innovation and regional value chains, as well as greater social inclusion, environmental sustainability and institutional strengthening.

Closing gaps in infrastructure, talent and governance — while incorporating sustainability and gender equity considerations, and promoting regional cooperation — will be key for AI to become a driver of structural transformation.

ILIA 2025 thus stands as a guide for shaping development policies that place AI at the service of a more productive, inclusive, and sustainable future for Latin America and the Caribbean.

This 2025 edition of the Latin American Artificial Intelligence Index (ILIA) provides quantitative and qualitative data on progress in artificial intelligence (AI) in 19 countries of Latin America and the Caribbean. ILIA is fundamental for identifying achievements, gaps and opportunities for improvement in the AI ecosystems of countries across the region and an essential reference to address the main challenges of Latin America and the Caribbean in AI and digital transformation.

Led by the National Centre for Artificial Intelligence (CENIA) of Chile and the Economic Commission for Latin America and the Caribbean (ECLAC), with the support of other public and private entities, the index facilitates the development of road maps for regional technological development. It is structured around three dimensions —enabling factors; research, development and adoption; and governance— and allows countries of the region to be classified into three groups according to the maturity of their ecosystems, as pioneers, adopters or explorers, providing a comprehensive view of technological progress. This analysis enables decision makers to design strategies that accelerate AI development, thereby fostering virtuous and competitive growth in the countries of the region.

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