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Economic and Workforce Impacts of AI in Latin America

A Review of Industry, Academic, and Open Source Evidence

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Economic and Workforce Impacts of AI in Latam America

The Latam AI market is currently valued at **US$12.7** billion and growing **28.1%** yearly, with public and private investments and significant adoption across the region.

Small businesses in Latam can leverage advanced open models and tools, **improving margins, innovation, and competitiveness** previously reserved for big firms.

Latam organizations adopting AI report **positive ROI, increased revenue, cost reductions**, and improved **customer satisfaction**.

Many studies show that the majority of Latin Americans have **trust in, optimism for, and openness to AI**, providing fertile ground for advancing investment and adoption.

8-14% of Latin American jobs could experience **significant productivity increases** through AI augmentation.

84% of employers in Latam plan to **upskill their own workforce** to meet the demand for tech talent.

More than one third (38%) of Latam organizations already **use open source AI,** with Mexico (65%) and Brazil (46%) as leaders in the region.

Open source's **cost effectiveness and flexibility** are critical factors for uptake in Latam, where half (50%) of professionals cite cost as a major barrier to AI adoption.

Open source AI powers affordable solutions across agriculture, education, energy, finance, healthcare, and public services, creating **replicable innovations**.

Contents

Executive summary

Artificial intelligence (AI) is rapidly reshaping the global economy and redefining how nations compete, innovate, and deliver public value. For Latin America (Latam), this transformation presents immense opportunities for economic growth, with a unique chance to democratize access to advanced technologies and create more inclusive digital futures. This report offers an evidence-based, comprehensive analysis of the economic, social, and workforce implications of AI for the region. Drawing from industry studies, academic publications, open source community reports, and regional case studies, it examines how open source AI can bridge inclusive economic growth for the region and anchor Latam's position as a co-creator of next-generation technologies.

AI already represents a significant and expanding economic force in Latam. The regional AI market is valued at an estimated US$12.7 billion and is growing at 28.1% annually. Some other projections are even more optimistic, suggesting that AI could add as much as US$1 trillion to Latin America's economy by 2038. Across business functions, organizations are reporting tangible results: more than two-thirds achieve productivity gains, over half see improved customer satisfaction and increased sales, and more than 40% report process optimization and cost reductions. Return on investment figures are striking—95% of medium-large Brazilian enterprises and 83% of Mexican enterprises adopting AI already report positive ROI or breaking even, above the global average of 80%. Public and private sector investment momentum is building, with over a quarter of all IT spending expected to flow toward AI by 2027 and major cloud providers and national governments committing billions to AI infrastructure, training, and research.

Latin Americans show keen cultural readiness and optimism toward the technology. Research indicates significantly higher trust and enthusiasm for AI in Latam than the global average—85% of professionals are ready to integrate AI into their work compared to 62% globally, and usage rates of AI tools already surpass those of many developed markets. This optimism and readiness provide fertile ground for AI adoption.

Open source AI offers a strategic pathway for Latam to capitalize on this momentum. The region has a strong tradition of open source innovation, and extending this to AI provides clear economic and social benefits. Open source AI lowers costs by factors of five to seven, accelerates customization for local languages and regulations, and enables organizations to avoid vendor lock-in. These benefits are especially vital for startups and small and medium-sized enterprises (SMEs), which represent 99.5% of all businesses and roughly 60% of formal jobs in the region. Already, 38% of Latin American organizations use open source AI, with Mexico and Brazil leading usage and contributing actively to model development.

Beyond the positive economic impact, open source AI is also a tool for representation, inclusion, and privacy. It provides the tools to build language-specific and culture-inclusive models that reflect local values and worldviews. It enables community-developed models to run locally and with limited connectivity, bringing advanced capabilities to rural schools, health centers, and local farmers. This democratizing effect is crucial in a region where digital infrastructure and income disparities could otherwise limit AI's benefits. Open source also allows governments and enterprises to maintain control over sensitive data, a major concern in sectors like healthcare, finance, and public administration.

As AI reshapes work, the most pressing challenge for Latam is not mass displacement but closing the skills gap to unlock AI's productivity potential. Between 30% and 40% of jobs are exposed to generative AI, but only a small fraction face high automation risk. The greater opportunity lies in augmentation—making millions of workers more productive. Open models and public codebases provide cost-effective pathways for universities, training programs, and individuals to build cutting-edge skills and showcase them transparently through contributions and portfolios, improving retention and employability.

The economic and workforce impacts are already visible across sectors. In agriculture, AI powers smartphone-based pest detection for smallholder farmers. In energy and environment, it enables predictive maintenance and real-time deforestation monitoring. In education, models support personalized lesson planning in public schools. In finance, SMEs leverage AI tools to expand microloans and financial inclusion. In public services, governments deploy AI to process legal cases, detect fraud, and build smart city platforms. In healthcare, hospitals use models to generate discharge summaries and combat misinformation while preserving patient privacy.

Looking ahead, Latam can capitalize on its collaborative culture, vibrant developer community, and rising AI adoption to become a global leader in open source AI. Policymakers, businesses, and civil society should align around open source AI to democratize access, preserve cultural and linguistic diversity, and drive sustainable, inclusive growth. By formalizing open source AI in national strategies, investing in open datasets and compute resources, and expanding open source training initiatives, the region can close its investment and skills gaps while fostering sovereignty and innovation. With deliberate action, Latam can shift from being an AI consumer to a co-creator, leveraging its enthusiasm and readiness to integrate to shape the next chapter of the global AI economy.

Introduction

Artificial intelligence (AI) is emerging as one of the most transformative technological forces of the 21st century, with the potential to reshape how economies function, how societies interact, and how innovation is distributed. For Latin America (Latam), a region characterized by diverse socioeconomic realities and ongoing efforts to improve digital infrastructure, education, and productivity, AI offers both a challenge and an unprecedented opportunity.[1] If harnessed strategically, AI can drive inclusive development, competitiveness, and sovereignty. The stakes are significant: with 26-38% of Latam jobs potentially influenced by generative AI, the region's approach to AI development will determine its position in the global digital economy.[2]

This report analyzes the economic, social, and workforce impacts of AI in Latam. As enthusiasm for AI adoption grows across the region, there is a need to align this momentum with strategic investments, infrastructure, and policy. Open source AI (see box for definition) offers a key to unlock the technology's full economic potential for the region.

This study synthesizes insights from numerous industry reports, academic publications, and regional case studies to assess both the impact and the untapped potential of AI in Latam, and the role of open source AI to propel this transformation forward. It examines economic opportunities, social applications, sector-specific use cases, and the positioning of the technology in national strategies. The goal is to equip policymakers, technologists, and developers with a clear, evidence-based understanding of how open source AI can catalyze inclusive and sustainable digital transformation in the region.

Definitions

Artificial Intelligence (AI) is defined by the OECD as a machine-based system that, for explicit or implicit objectives, infers, from the input it receives, how to generate outputs such as predictions, content, recommendations, or decisions that can influence physical or virtual environments.[3] According to a SAP survey, the most commonly adopted forms of artificial intelligence in Latam are generative AI, used by 61% of organizations, and traditional machine learning, adopted by 38%.[4]

Generative AI (GenAI) refers to AI systems and models that create novel outputs, such as text, images, audio, video, and/or code, by learning patterns and distributions from training data rather than following explicit programming. Generative AI includes but is not limited to: language models, which enable tasks such as text generation and summarization; vision models, which enable tasks such as image generation and modification; and multimodal models, which are trained on data of multiple modalities, such as text, images, and audio, and accordingly enable the generation of outputs across different modalities, such as text-to-image creation or image-to-text reasoning. Among these, foundation models, which are characterized by their large scale, training on diverse datasets, and adaptability to various downstream tasks, play a crucial role in the development and application of generative AI systems.[5]

Open models are defined in the Generative AI Commons' Model Openness Framework as machine learning models whose architecture, parameters (i.e., pre-trained weights and biases), and documentation are released under permissive licenses that permit their use, study, modification, and redistribution.[5]

Some of the research cited in this report does not distinguish between traditional and generative AI in their reporting.

AI in Latam

A thriving AI market

AI is a significant economic force in Latam, with a market valued at around $12.7 billion and expanding at an annual rate of 28.1%, i.e., nearly doubling every three years.[6,7,8] (see Figures 1 and 2). According to a 2025 Accenture report, generative AI could inject up to US$1 trillion in GDP gains to Latam by 2038, depending on the employee reskilling and redeployment strategies taken by organizations.[9] This rapid expansion and impact signal a profound technological and economic transformation underway in the region.

FIGURE 1

LATAM'S AI MARKET DEMONSTRATES SIGNIFICANT SCALE AND GROWTH POTENTIAL

Latin America AI Market

Market Size, Growth & Economic Impact Overview

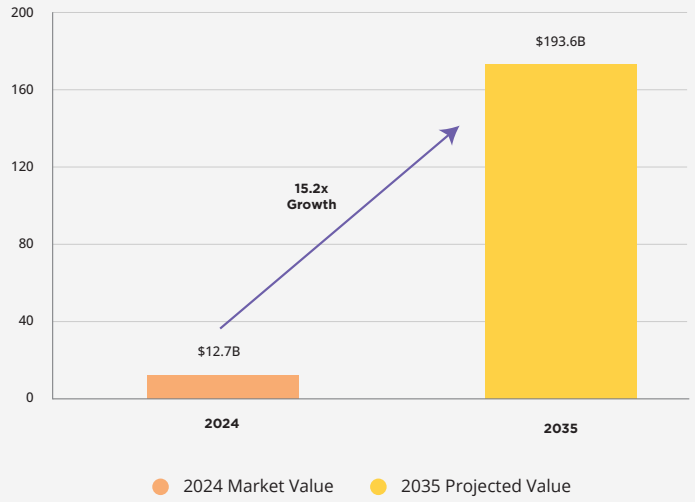
$12.7B	28.1%
Current Market Size	Annual Growth Rate

Sources: (1) The current market size was calculated as an average from estimates found in a variety of sources: IMARC's $4.7B,[6] Statista's $11.8B,[7] and Market Data Forecast's $21.6B,[8] resulting in an average Latam market value of $12.7B. (2) The annual growth was calculated as an average of Compound Annual Growth Rates (CAGR) reported by IMARC (22.9%),[6] Grand View Research (26.2%),[10] Statista (26.3%),[7] and Market Data Forecast (37.1%),[8] resulting in an average Latam CAGR of 28.1%.

FIGURE 2

PROJECTED GROWTH OF LATAM'S AI MARKET FOR 2035

Latin American AI Market Forecast (USD Billions)



Sources: The market value of $12.7B and the CAGR of 28.1% were used to calculate these statistics. The data sources and calculation methodology are provided in Figure 1.

Results are already emerging across the region. As observed in Table 1, companies report significant operational improvements: 68.6% achieve productivity gains, 57% see improved customer satisfaction, 54.3% experience increased sales, and 41.5% optimize their processes.[11] Organizations in Latam expect significant value in areas such as software development (55%), data analysis and reporting (48%), and consumer support (48%).[12] Return on investment figures are particularly impressive, with Brazil leading at 95% of medium-large companies reporting either positive ROI or breaking even, followed by Mexico at 83%—both above the 79% average observed across other major economies.[13] 83% of businesses that have adopted AI in Mexico report increased revenue, at an average increase of 16%.[14] Additionally, 88% say they have already seen significant productivity improvements.[14] After implementing AI solutions, 35% of Latin American companies report cost reductions.[4] 87% of IT leaders in Brazil believe generative AI will soon play a major role in their companies.[15]

TABLE 1

PERCEIVED BENEFITS OF ADOPTING AI

BENEFIT	PERCENTAGE
Productivity	68.6%
Customer satisfaction	57.0%
Increased sales	54.3%
Process optimization	41.5%

Source: NTT DATA[11]

Investment momentum is building rapidly across the region. Over 25% of IT spending is expected to flow toward AI by 2027, promising double-digit increases in innovation rates.[16] This shift is already materializing: Brazil's IT sector investments surged from $49.8 billion in 2023 to $58.6 billion in 2024, driven primarily by AI advances.[17] Generative AI projects are expected to exceed $2.4 billion by 2025, with 87% of Brazilian leaders planning to increase or maintain AI investments.[17] Multi-billion dollar investments have been announced across Latam, focusing on cloud infrastructure, data centers, and AI capabilities that will support the region's digital transformation.[18,19,20,21,22,23,24,25]

Government commitment is also substantial. Brazil is implementing a comprehensive AI strategy, investing approximately US$4 billion through its National AI Plan, including supercomputer infrastructure and skills development.[26] Chile announced a 14 billion-peso investment for the creation of two supercomputing centers dedicated to artificial intelligence.[27]

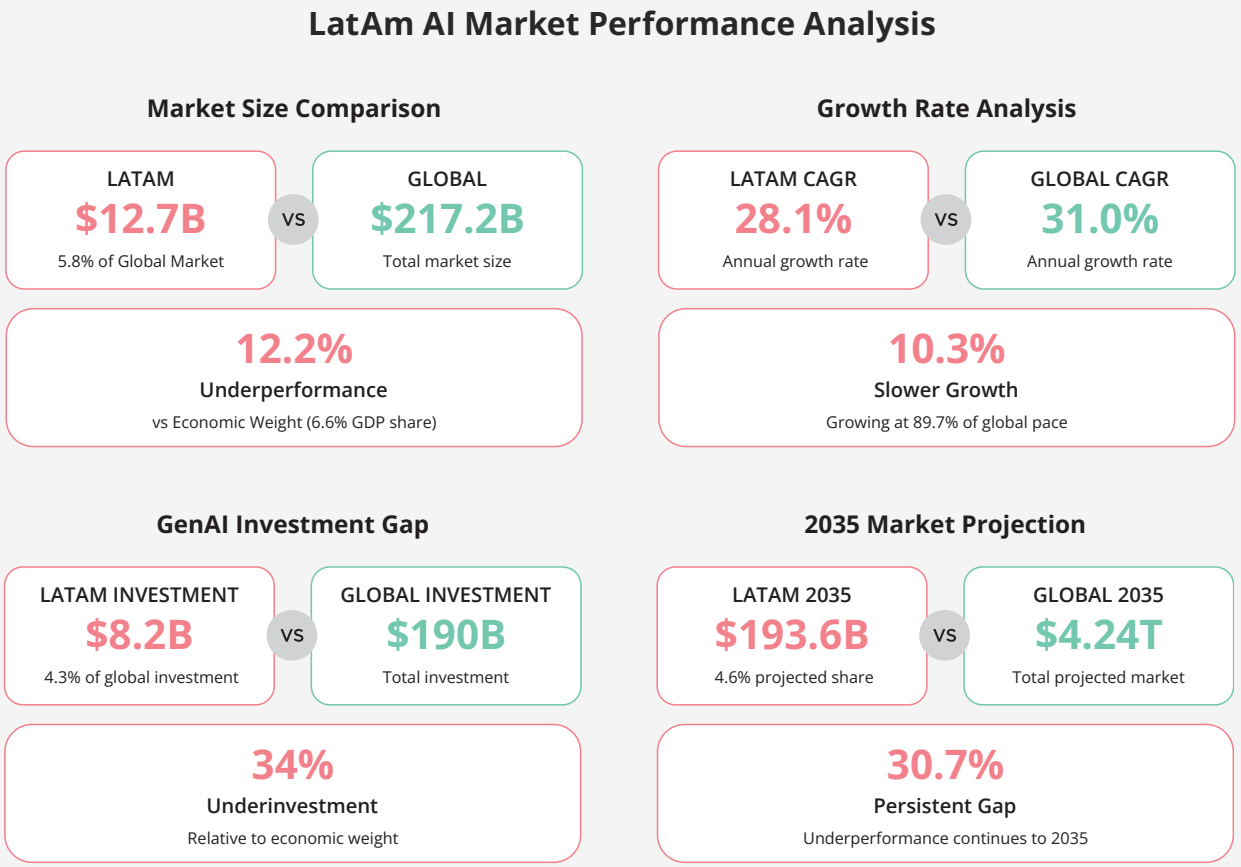
The gap between Latam and global performance

Despite the thriving AI market, Latam faces a significant gap when viewed from a global perspective (see Figure 3). The region's AI market accounts for only 5.8% of the global market, disproportionately smaller compared to its 6.6% contribution to global GDP. This represents an underperformance of 12.2% relative to the region's economic weight, indicating a disconnect between Latam's economic capacity and AI market participation.

More concerning is the trajectory of this gap. While 28.1% annual growth appears impressive, it lags behind the global average of 31% (see Figure 3). This seemingly modest difference compounds over time, meaning Latam is starting behind and falling further each year. The projected 5.4% GDP increase by 2030 appears modest compared to other regions, such as the United States, which projects a 21% net GDP increase from AI by the same timeframe.[28] If this trend continues, the Latam AI market will have a 30.7% underperformance relative to its economic weight by 2035 (see Figure 3).

FIGURE 3

THE LATAM AI MARKET IS UNDERPERFORMING IN RELATION TO THE REST OF THE WORLD



Sources: (1) The Latam market calculation is explained in Figure 1. The current global market size was calculated as an average from estimates found in different sources: IMARC's $115.6B,[29] Statista's $244.0B,[30] Market Data Forecast's $292.0B.[31] The GDP comparison is based on 2024 estimates from the World Bank Group, which place Latam's GDP at $7.3 trillion[32] and global GDP at $111.3 trillion,[33] yielding a regional share of 6.6%. The underperformance was calculated based on the expected value for a 6.6% share (~14.25B) vs. the actual participation (12.7B), yielding a 1.55B difference (12.2% of the current market of $12.7B). (2) The Latam CAGR calculation is explained in Figure 1. The global annual growth was calculated as an average of Compound Annual Growth Rates (CAGR) reported by IMARC (23.6%),[29] Statista (27.0%),[7] Grand View Research (35.9%),[34] and Market Data Forecast (37.4%),[31] resulting in an average global CAGR of 31.0%. Even when analyzed in isolation, each of these sources consistently projects a higher CAGR globally than for Latam (see individual statistics for Latam in Figure 1). The difference in growth is 2.9%, which means that Latam would need to increase its growth rate by 10.3% of its current rate (which equals 2.9 percentage points) to match the global average. (3) Investment in GenAI is based on data cited by JPMorgan.[35] Based on Latam's 6.6% share of global GDP, the region should attract $12.5 billion in GenAI investment, but it only receives $8.2 billion—a shortfall of $4.3 billion, which is 34% less than the expected amount. (4) The projected AI market size (2035) assumes Latam's AI market grows at 28.1% CAGR and the global market at 31% CAGR from a 2024 baseline, with underperformance measured as the gap between Latam's actual market size versus the 6.6% share it should capture based on its current proportion of global GDP.

These performance gaps reflect deeper issues in the region's current AI foundations. The AI readiness index published by Oxford Insights, which aggregates indicators of government strategy, data infrastructure, and technology, reveals concerning structural gaps (see Figure 4).[36] Latam averages 42.99 points, below the global average of 47.59 and significantly below North America's 82.60 and Western Europe's 69.56. The region ranks 7th among the regions, only above South and Central Asia (42.28) and Sub-Saharan Africa (32.70). Even the region's top performers struggle to compete globally: Brazil (65.89), Chile (63.19), and Uruguay (62.21) score below the average of other developed regions.

FIGURE 4

LATAM AI READINESS LAGS BEHIND THE REST OF THE WORLD

Source: Data from Oxford Insights (2024).[36] The AI Readiness Index is scored out of 100.

Latam also faces a significant investment shortfall (see Figure 3). Combined investment in GenAI development across all of Latam totals just $8.2 billion—only 4.3% of the global $190 billion, despite representing 6.6% of world GDP.[35] This investment gap constrains the region's ability to develop AI capabilities and compete effectively in global markets and can help explain the performance gap.

Nevertheless, the region has an immense untapped potential. Countries embracing AI are projected to achieve 25% higher economic growth than those that lag behind.[37] The economic opportunity is substantial: even in 2022 before the GenAI boom, a Google study found that realizing the full potential of digital technologies could generate $1.37 trillion across the region's six largest economies by 2030, equivalent to 23% of their

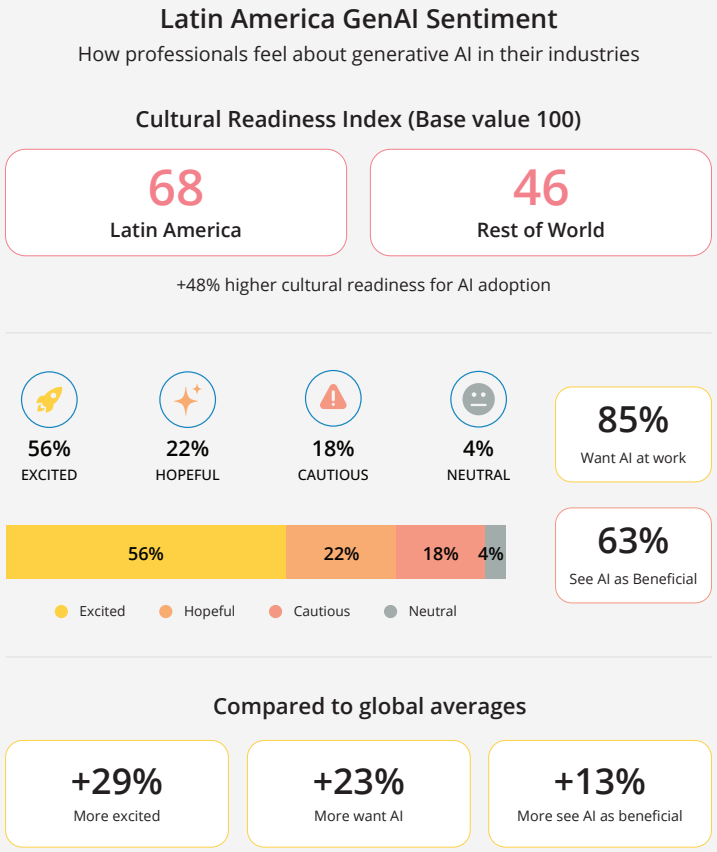
combined GDP.[22] JPMorgan identifies a $100 billion opportunity specifically in AI-enabled knowledge services exports over the next decade, with transformative implications for the entire region.[35] For example, Brazil could accelerate from 3.2% to 4.1% annual growth, while Colombia could reach 4.5% instead of 3.7%, representing meaningful economic improvements for millions of people.[37]

Latam's cultural readiness for AI transformation

Latam possesses an invaluable asset that can help accelerate AI adoption and impact: Latin Americans hold exceptional optimism and cultural readiness* for AI-driven transformation that significantly exceeds global averages (see Figure 5). Therefore, while Latam lags in market share and readiness scores, its human capital demonstrates unmatched enthusiasm that could compensate for infrastructure gaps.

FIGURE 5

LATIN AMERICANS ARE MORE POSITIVE TOWARDS GENAI THAN THEIR GLOBAL COUNTERPARTS



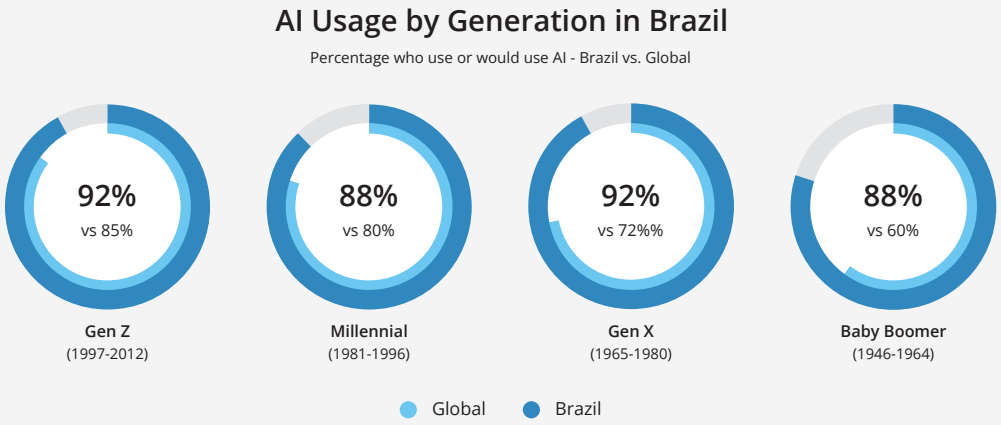
Sources: Thomson Reuters[38] (excitement and want AI at work) and Ipsos[39] (see AI as beneficial), Cautious = Hesitant (10%) + Concerned (5%) + Fearful (3%), Latam average based on Ipsos data: Mexico (70%), Peru (69%), Chile (63%), Colombia (58%), Brazil (58%), and Argentina (57%) = 63%. The global average is 50% when considering all other non-Latam countries. Thomson Reuters sample size = 1,702 (233 in Latam), Ipsos sample size = 23,216 (2,500 in Latam). Cultural readiness was calculated as an average of excitement (56% vs. 27%), willingness to use AI at work (85% vs. 62%), and perception of benefits outweighing risks (63% vs. 50%).

* We define cultural readiness as the level of excitement with the technology, willingness to use AI at work, and perception of benefits outweighing risks.

Excitement levels demonstrate the depth of this enthusiasm: 56% of Latin Americans are excited about AI integration versus just 27% globally.[38] Interestingly, only 18% express caution about AI adoption, suggesting low resistance to transformation.[38] Brazil is cited in research from KPMG as one of the countries that show the most enthusiasm for AI.[40] Brazil also exemplifies the region's cross-generational AI enthusiasm, with usage rates consistently exceeding global averages across all age groups (see Figure 6).[41] This broad-based acceptance across generations suggests that AI adoption will not be constrained by age-related resistance, a common barrier in many markets.

FIGURE 6

GENERATIONS WHO USE OR WOULD USE AI IN BRAZIL



Data source: Salesforce (2024)[41]

This optimism extends towards professional settings. An overwhelming 85% of Latam professionals express readiness to fully embed generative AI into core operations and strategic planning, compared to the global 62%.[38] Moreover, 63% of Latin Americans view AI as more beneficial than harmful compared to only 54% in the rest of the world.[39] In Brazil, 81% (vs. 71% globally) say generative AI makes them more productive at work, and 82% (vs. 58% globally) say generative AI makes them more engaged at work.[42]

Latin Americans also demonstrate greater trust in AI than their global counterparts: for example, in KPMG's 2023 survey, Brazil ranks in the top four countries willing to trust AI, with 56% of Brazilians trusting the technology versus 38% in other countries.[40] Data from Salesforce shows that 76% of consumers in Brazil and 73% in Mexico trust AI agents in financial services, compared to 52% in the rest of the world.[43] Research consistently indicates that the region's population is more open to the technology than their global counterparts.[40,44]

This perception advantage represents a unique competitive asset. While other regions grapple with AI skepticism, regulatory hesitancy, and implementation resistance, Latam offers fertile ground for rapid scaling. As noted by a consulting firm, *"Latin America may currently trail in adoption, but this is not a setback—it's an invitation."*[45] Cultural readiness could accelerate implementation timelines and reduce change management costs significantly.

Rapid adoption in practice

Companies across the region are already transforming this enthusiasm into adoption. An impressive 47% of companies are already implementing AI solutions (5 percentage points higher than the global average) and another 37% actively experimenting.[44] A 2025 International Data Corporation study reveals even higher penetration in Latam, with 65% of Latin American companies having adopted AI technology and an additional 25% planning implementation within the year.[46] Brazil leads the region with 63% of companies actively using AI and 33% initiating more than 20 AI pilots in 2024.[13,47] This momentum

extends to consumers, with 76% of consumers in Brazil and 70% in Mexico reporting using GenAI tools, compared to a global average of 66%.[48]

The pace of implementation is equally striking. Two-thirds of regional organizations (67%) have accelerated their AI rollout compared to just 59% worldwide, while 95% are either implementing or evaluating natural language processing applications.[44] Looking ahead, 38% plan to implement GenAI, with half expecting deployment within the next year.[38] Mexico alone projects a 31% AI adoption growth rate.[14]

Investment commitments reinforce this trajectory. Among regional decision-makers, 52% expanded their AI implementation strategies in 2024, with 55% planning increased investment compared to the previous year.[4] Brazil and Mexico lead future spending intentions, with 78% and 69% of companies, respectively, planning AI investment increases in 2025. These markets also demonstrate superior execution: 49% of Brazilian pilots and 50% of Mexican pilots achieve full launch, both exceeding the 46% global conversion rate.[13]

The open source AI ecosystem in Latam

Latam's exceptional enthusiasm for AI adoption, combined with decades of open source expertise and a collaborative development mindset, positions it uniquely to leverage open source AI.

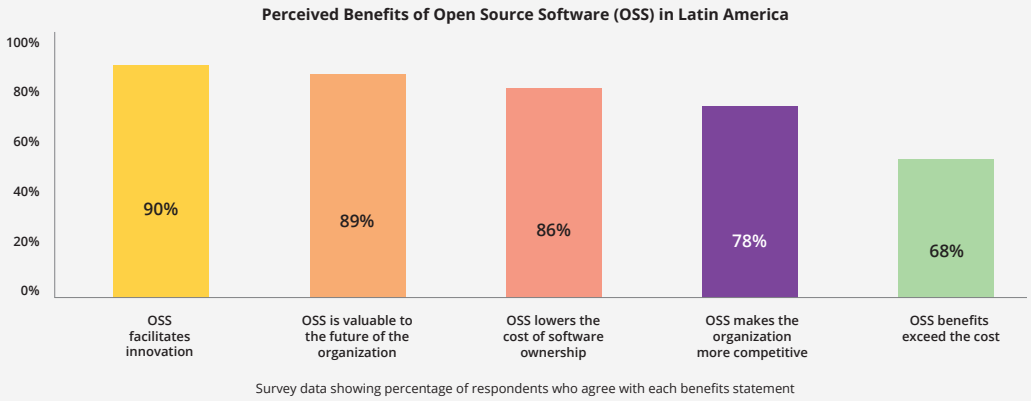
Latam's open source excellence

Latam's open source community has deep roots and broad applications. The region's open source services market generated $3.9 billion in 2023 and is projected to grow at a 16.5% CAGR through 2030, reaching $11.4 billion by decade's end.[49] Government agencies have embraced open source solutions as a pathway to digital sovereignty while increasing public sector efficiency.[50] Organizations are also largely adopting open source, with 71% increasing open source usage, primarily to enhance productivity and reduce costs.[51] A survey from the Federation of Industries of São Paulo indicates that 70% of small to medium-sized enterprises (SMEs) are shifting to open source software (OSS) to minimize expenditure without compromising quality.[52] The Linux Foundation's (LF) 2025 survey results confirm that Latin American professionals overwhelmingly view OSS as a driver of innovation (90.2%), cost efficiency (86%), and long-term competitiveness (78%) (see Figure 7).[53]

Beyond use, Latam is also making substantial contributions to open source.[50,54,55] The region has experienced one of the most significant relative increases in global OSS contributor share in recent years, with Brazil ranking among the world's top countries for open source contributors.[56] GitHub data reinforces this momentum, identifying Brazil as one of the fastest-growing developer communities globally (27% YoY) and ranking it 4th worldwide in contributions to open source projects, with expectations of reaching 3rd place by 2028.[57,58,59] The region's mature ecosystem of contributors provides fertile ground for the next frontier: open source AI development.

FIGURE 7

LATIN AMERICAN ORGANIZATIONS BENEFIT FROM OPEN SOURCE SOFTWARE



Source: 2025 World of Open Source, filtered by respondents in Mexico, Central America, the Caribbean, and South America; Q18, Q28, aggregating 'often' and 'sometimes', Sample Size = 56, DKNS excluded[53]

Open source AI in Latam

Open source AI delivers the core advantages of OSS while addressing unique challenges in AI development. These benefits include reduced costs, broader access to AI technologies, culturally inclusive datasets, decreased dependence on foreign platforms, and enhanced regional cooperation.[60] These benefits lower innovation barriers for both advanced and emerging economies, enabling cross-border learning while fostering effective localized solutions.[61]

Open source AI adoption rates are strong across the region. According to the 2025 LF survey, 38% of Latin American organizations** are already using open source AI.[53] In Brazil, 46% of organizations regularly use open source AI models, while Mexico reports even higher usage rates at 65%.[62,63] A study from IBM shows that 44% of companies in Brazil and 50% in Mexico base the majority of their AI solutions or platforms on open source AI.[13] A significant proportion of companies in these countries plan to increase open source adoption to optimize AI implementations in 2025 (45% in Mexico and 50% in Brazil).[13]

The region's open source AI community continues to expand through various projects, events, and supporting organizations. The Llama Impact Pan-Latam Hackathon exemplifies this momentum, engaging more than a thousand participants in 2024 across 114 teams who developed 48 AI applications.[64] Major regional conferences, including Nerdear.la, Khipu, DeveloperWeek Latam, America Digital, and Open Source Summit Latin America, explicitly feature open source AI content.[65,66,67,68,69] Academic gatherings such as the Mexican International Conference on Artificial Intelligence (MICAI) and the IEEE Latin American Conference on Computational Intelligence (LA-CCI) facilitate open dataset sharing and scientific knowledge exchange.[70,71] Supporting organizations also play crucial roles in nurturing regional talent and open source initiatives. LatinX in AI (LXAI), Tribu IA (Chile), and C4AI (Brazil) provide support for community development and collaboration.[72,73,74] Latam is also an active contributor to open source AI development, with a strong presence on GitHub: Brazil ranks among global communities creating the most generative AI projects on the platform,[59] with more than 50,000 AI-related code contributions between 2012 and 2023, followed by Mexico at over 11,500, Colombia at over 10,000, and Argentina at over 5,000.[75]

This combination of strong adoption rates, community engagement, and increasing development positions Latam as both a strong market for open source AI solutions and an active contributor shaping the technology's future. This transformation from consumer to co-creator generates substantial value for the region itself, building local expertise, reducing technology costs, and creating new economic opportunities across multiple sectors. The path forward is clear: rather than trying to match Silicon Valley's investment levels, Latam can leverage its unique combination of AI enthusiasm, cultural readiness, and OSS traditions to become a global leader in open source AI innovation. Formalizing the adoption of open source AI at the national level is a critical next step on this path as governments mobilize to foster artificial intelligence development.[76, 77] Prioritizing open source in the region's current AI strategies—which currently lack open source references beyond open data (see Table 3 in the Appendix)—will help Latam close the innovation gap through community-driven development.

The path forward is clear: rather than trying to match Silicon Valley's investment levels, Latam can leverage its unique combination of AI enthusiasm, cultural readiness, and OSS traditions to become a global leader in open source AI innovation.

** In the survey, organizations include nonprofits, academic/research institutions, government, and private sector (IT vendors, consulting firms, service providers).

Economic benefits of open source AI

As described above, open source AI delivers a variety of economic benefits, including cost savings in implementation and operation and enhancements in productivity and innovation.[78,79] These benefits are particularly critical for Latam, where 50% of professionals cite cost as a major barrier to AI adoption and 53% of companies consider natural language processing technologies too expensive.[38,44]

Cost savings and return on investment (ROI)

In countries with high informality and scarce capital, including those in Latam, proprietary technology costs are prohibitive for many small enterprises, causing most businesses to abstain from immediate implementation.[80] Global studies indicate that companies would need to spend 3.5 times more on software if open source didn't exist, with cost-benefit ratios exceeding 1:4.[78,81,82] Organizations using open source AI are 24% more likely to report positive ROI compared to those relying solely on proprietary solutions.[83] For Latam specifically, 61% of professionals identify cost reduction as open source's primary benefit to their industry.[53] Cost savings derive from multiple factors:

- **Direct cost reductions:** Estimates show that open source AI models can cost 5 to 7 times less than proprietary alternatives.[84,85,86,87]
- **Implementation and maintenance savings:** Organizations report lower costs related to implementation (60%) and maintenance (46%) with open source AI by allowing developers to build on existing, community-vetted foundations.[62]
- **Specialization:** Open models can achieve up to 30-fold reductions in AI inference costs.[88] Brazil's Sabiá-3 model matches frontier LLM performance at three to four times lower cost per token through domain specialization, with strong performance on Portuguese and Brazil-related tasks.[89]
- **Open innovation and knowledge sharing:** Open source models make advanced AI development accessible to data- and resource-constrained organizations and countries.[90]

Productivity and efficiency gains

Some estimations indicate that Latam is 4 times less productive than the United States, a gap that has worsened from 2.5 times in earlier decades.[91,92] However, the IMF notes that AI's productivity potential in Latam's formal sector is comparable to that in advanced economies, suggesting that effective AI adoption could help narrow this disparity.[1]

2024 research from McKinsey estimates that 60-70% of work activities in Latam are exposed to some degree of automation.[93] The productivity multiplier effect is particularly pronounced in knowledge work, including coding, content creation, data analysis, and customer service. By automating routine tasks, AI allows skilled professionals to focus on higher-value, strategic work, increasing overall efficiency. This leads to more efficient development processes and faster time-to-market for new products and services. This helps to explain why 63% of Latin American companies expect AI to have a significant industry impact, especially in Mexico (72%).[4] After implementing AI solutions, 64% of regional companies already report greater efficiency and productivity.[4]

Innovation acceleration and market responsiveness represent less quantifiable but equally important productivity benefits of open source AI. The open source development model enables

rapid iteration and improvement cycles, by tailoring open models to automate internal processes and share updates. A lack of vendor lock-in allows companies to pivot strategies or improve their product internally as needed. Companies using open source AI demonstrate greater organizational agility, being 46% more likely to launch AI pilots and 12% more likely to increase AI investments compared to those using only proprietary systems.[13]

Innovation and competitive advantage for small businesses

By leveraging AI tools, many small and medium-sized enterprises (SMEs) are able to enter the market and maintain competitiveness once launched. Open source AI allows smaller businesses to access state-of-the-art technology without expensive licensing fees. Given that SMEs comprise 99.5% of businesses and approximately 60% of formal jobs in Latam, their adoption of AI has broad economic implications.[94]

SME AI adoption rates reveal rapid technology uptake despite resource constraints. In 2025, 54% of Latin American SMEs are already using some form of AI, with 49% specifically using generative AI.[94,95] In a study from Microsoft, the majority of SMEs (70% of those surveyed) plan to increase AI investments in 2025, aiming to boost productivity and innovation.[94,95] Over 70% cite process optimization as a key gain, around 60-66% report time savings, nearly 43% see reductions in human errors, and over 50% note improved customer experience from AI integration.[94,95] This trend is also confirmed by a 2025 study from Morning Consult/Meta, which showed strong interest in the use of generative AI (Mexico 89%, Brazil 88%, Colombia 80%, and Argentina 79%), with more than half of companies already using this technology.[96] AWS and Strand Partners estimate that adoption of AI by SMEs in Mexico is experiencing a 32% annual growth rate and that 53% of startups in Brazil say they are leveraging AI in some way throughout their business.[14,97] By leveraging AI tools, many SMEs experience productivity and operational efficiency: 88% of SMEs in Brazil report that AI makes their operations more efficient, 89% say AI helps them scale services, and 84% state that AI improves margins.[98] These numbers are even higher in Mexico: 94%, 93%, and 89%, respectively.[98] This translates to faster innovation and greater market impact, allowing small businesses to reach the market faster.

A significant opportunity remains. Only 18% of Latin American SMEs allocated budget for AI adoption in 2023, which could indicate that a majority of small businesses may lack resources for AI implementation.[8] Open source AI's cost advantages could enable the remaining 82% to access transformative technologies previously available only to large corporations. Market democratization effects are particularly pronounced in the open source AI ecosystem. Traditional barriers to AI development—access to training data, computational resources, and algorithmic expertise—are substantially reduced when entrepreneurs can build upon community-developed models and tools. They can leverage, for example, one of the 85,000+ Llama derivatives published on Hugging Face to develop specialized applications ranging from medical diagnosis to agricultural optimization without reinventing core algorithms and collecting data themselves.[99]

AI startups in Latam

Latam is a highly entrepreneurial region.[100] The region has experienced remarkable startup growth, with $4.2 billion in total investment across the region in 2024, a 27% increase from 2023.[45,101] The growth of investments in Latam startups outperforms Europe's and Southeast Asia's growth.[102] There is strong governmental and venture capital investment in the region.[103,104] The rising rate of tech startups valued at more than US$1 billion, known as 'unicorns', is a testament to this boom.[105] In Mexico alone, the number of AI companies has grown 965% between 2018 and 2024.[106]

AI startups attracted more investment than any other sector in Latam in 2024, representing 34% of all funding rounds, which indicates strong investor confidence in the sector's growth potential.[107] 45% of the 2,252 emerging tech startups in Latam are focused on AI, and these startups attracted 60% of the seed funding (US$3.8 billion).[108,109] Brazil leads regional AI development with 74% of Latam's AI startups, especially in the generative AI area.[8,109]

Societal impacts of open source AI

Open source AI holds transformative potential for Latam, extending far beyond economic gains to address fundamental societal challenges. Open source AI provides the region with powerful tools to preserve cultural identity, democratize access to the technology, and promote data privacy.

Culturally relevant and language-inclusive AI

A persistent criticism of dominant global AI models is their heavy bias toward English-language data and North-Western perspectives.[110] This overrepresentation creates systems that misrepresent or entirely erase the nuances of other societies. The bias manifests in concrete, measurable ways. Studies show that popular generative AI models were incorrect in 46% of cases when prompted in Indigenous languages.[111] Even when the models generated accurate information, the answers were four times shorter and included Anglo-Saxon cultural references rather than culturally relevant context.[111] The predominance of English content on the internet has introduced a linguistic bias in AI models, which are typically trained on English data and consequently perform better in that language.[111,112,113]

Language is a vehicle for worldviews and culture; for AI to serve Latin American communities equitably, AI tools must be both linguistically and culturally appropriate to their users' contexts.

The linguistic underrepresentation does not affect only indigenous languages. Spanish and Portuguese, the world's 4th and 8th most spoken languages with 559 million and 267 million speakers respectively, occupy just 2% and 1% of open source AI training datasets, compared to English's dominant 59%.[114,115] Language is a vehicle for worldviews and culture; for AI to serve Latin American communities equitably, AI tools must be both linguistically and culturally appropriate to their users' contexts.[116]

Open source as a solution for cultural sovereignty

Open source AI offers a direct path to addressing these challenges. The technology enables Latin American communities to develop AI systems that authentically reflect their languages, values, and worldviews, aligning with the principles of diversity of cultural expressions promoted by UNESCO.[117] Open source provides the means to preserve and strengthen this cultural foundation through technology rather than being displaced by it.

The Latam-GPT project exemplifies this culturally-grounded approach.[118] In a collaboration led by Chile's CENIA involving over 30 institutions across multiple countries, this project is building an open source model specifically trained on the region's diverse linguistic landscape, including Spanish, Portuguese, and indigenous languages like Quechua, Nahuatl, Mapudungun, and Rapa Nui. By mid-2025, the project processed over 2.6 million documents from regionally sourced data, drawing from books, academic archives, libraries, and historical collections across 10 countries.[118,119] The project is a deliberate act of cultural preservation, enabling the model to better understand local history, values, examples, slang, and cultural references while reducing dependence on foreign AI platforms. As Chile's Science Minister observed: *"[The project] could be a democratizing element for AI,"* noting its potential use for local schools and hospitals that need technology reflecting their own cultural and linguistic reality.[120] As project leaders explain, *"It's important that we*

develop capabilities in the region to have independence and make decisions about how this technology impacts society."[121]

The Latam-GPT project exemplifies the open source approach at multiple levels: it builds upon Meta's Llama 3 open source model as its technical foundation, demonstrating how existing open technologies can be leveraged and enhanced for regional needs.[120] The initiative embodies collaborative effort around open source development in a partnership involving 30 institutions across 12 countries, including Chile, Mexico, Argentina, Colombia, Ecuador, Peru, and Uruguay.[122] The project's commitment to open source principles ensures that its resulting models will be freely accessible to developers throughout the region, enabling applications across education, public policy analysis, environmental research, and countless other domains.

Latam-GPT is an example of how language inclusivity is a foundational pillar to democratize AI's economic and social impacts. Other open source language initiatives, such as Portuguese-specific adaptations of Llama open datasets of phrases in native languages, as well as Meta's No Language Left Behind initiative, demonstrate the value of open source for grassroots AI model development.[123,124,125,126,127,128]

Democratizing AI access and promoting digital inclusion

Latam faces a critical challenge in the AI revolution. As one of the world's most unequal regions, Latam risks becoming more unequal if AI development follows traditional patterns that concentrate power and benefits among urban elites and multinational corporations.[129,130] The stakes are particularly high given the region's existing infrastructure gaps—only one in four rural inhabitants has access to broadband coverage.[105] The World Bank estimates that up to half of the 17 million jobs that could benefit from AI in Latam won't be able to access it due to inadequate digital infrastructure.[129] Moreover, under current dependency models, projections indicate that only 3% of the global AI's economic benefits will reach the region.[131] This reality creates the need for a fundamentally different approach that prioritizes democratization and ensures advanced technologies serve people across diverse socioeconomic levels.

Open source's accessibility and cost savings foster more equitable opportunities to benefit from AI advancement. Some specialized open models can even be downloaded and run locally, addressing connectivity challenges.[132] For instance, Solo Tech uses Meta's Llama to provide offline AI support for underserved rural communities with limited internet access.[133] Local communities can download, modify, and deploy AI models to address regional or local challenges. Open source development enables this customization while simultaneously building technical expertise within regional institutions. Such approaches could extend AI-assisted diagnosis or education in local language and culture, especially where doctors and teachers are scarce. As described by Constanza et al. (2020), AI has a great potential for social good, but only when the technology is accessible, adaptable, and aligned with local needs and contexts.[130] Open source AI makes this vision achievable across Latam.

Latin American initiatives exemplify this ethical approach to open source AI. Argentina's open source IA^2 cooperative explicitly focuses on responsible AI in alignment with human rights principles, demonstrating how regional values can be embedded in development practices.[134] Similarly, Latam-GPT's team includes not just engineers but also humanities scholars and community representatives to ensure fair representation of minorities.[118]

Promoting privacy through open source

While access remains important, AI democratization also depends on addressing fundamental privacy, ethics, and fairness concerns. In Latam, where 47% don't think companies protect their personal data,[39] 56% express concerns about data privacy and security,[130] open source AI offers a compelling alternative to proprietary "black box" systems. Indeed, only 49% of Latin American companies take adequate actions to safeguard data privacy throughout the entire lifecycle, creating particular risks when data is transmitted to external companies, who may use it for model training.[44] Multiple studies show that data privacy concerns pose a major challenge to the Latin American AI market.[8,38]

Open source AI fundamentally changes this dynamic by enabling on-premises deployment, allowing organizations to maintain complete ownership and control of their data. This local control is especially valuable in sensitive sectors like healthcare, finance, and government services, where data sovereignty is paramount.

The impact of AI on Latam's workforce

The integration of AI into Latam's economy represents one of the most significant workforce transformations in the region's modern history. While public discourse often centers on fears of mass job displacement, emerging evidence reveals that the primary challenge lies not in immediate automation risks, but in the urgent need for comprehensive upskilling and reskilling to capture AI's transformative productivity potential.[78]

AI's augmentation of the workforce

Analysis by the World Bank indicates that between 30% and 40% of all jobs in Latam have some level of exposure to generative AI.[80,129] The World Bank projects that while only 2-5% of jobs in the region face a high risk of full automation, 8%-14% could experience significant productivity increases through AI augmentation.[129] This productivity potential is substantial: in Chile alone, incorporating generative AI tools into the workflows of the country's top 100 job categories could accelerate tasks of 5.69 million workers and raise GDP growth by 1.21 percentage points, adding approximately $3.38 billion to the economy.[135] About 20% of employment in Latin American countries falls into the category of high exposure and high complementarity.[1] In these jobs, AI makes workers more productive without replacing them.

The impact is not the same across all sectors. Sectors with the largest potential gains from AI include education, trade, finance, real estate, IT, government, and health, where over 50 percent of the workforce is significantly exposed to AI and benefits from high complementarity.[1] One example is doctors: AI can sharply reduce the time they spend on administration and allow them more time to spend on patients. On the other hand, the jobs most at risk of being lost are those where AI can execute most of the tasks and replace workers (high exposure and low complementarity), such as call center workers.[1] About a quarter of jobs in the Latam countries fall into this category.[1] Finally, some sectors like mining and manufacturing will experience more limited AI integration due to lower workforce exposure to AI-compatible tasks.[1]

The benefits and risks of AI adoption are also not equally distributed across the demographics. Women are, on average, twice as likely as men to hold jobs at risk of automation by generative AI, reflecting existing occupational segregation patterns.[129,136] As women represent only approximately 37% of STEM graduates in Brazil[137] and similar or lower percentages in other Latin American countries, this underrepresentation can widen the existing gap.

The skills gap challenge

Despite concerns about job replacement, the most significant threat facing Latam is economic stagnation due to skills deficits across industries, technologies, and job types. The World Economic Forum says that Latam has the biggest skills gap in the world, with three in four companies saying they have problems filling vacancies, despite the availability of candidates.[138] This shortage is bigger among large companies of more than 250 employees, where it affects four in five.[138]

The most significant threat facing Latam is not job displacement, but economic stagnation due to skills deficits.

The growing demand for AI skills can exacerbate this general skills gap. A PwC study found that Brazil's demand for AI skills quadrupled in just three years, with job numbers in AI-exposed occupations growing 264% since 2021, including positive growth across all occupation types.[139] Indeed, of the jobs that could be augmented by AI, up to half—representing approximately 17 million workers—will be unable to leverage these potential benefits due to inadequate digital infrastructure and lack of necessary skills.[129] The skills gap represents the economic cost of inaction: the failure to capture immense productivity gains that could transform the region's economic trajectory.

The AI skill gap in engineering fields in Latam can be up to five times greater than in industrialized nations.[135] Furthermore, 77% of Latin American professionals report lacking generative AI training from their employers, which is 13 percentage points higher than the global average.[38] Lack of skills was reported as the major barrier for AI adoption in Mexico, with 55% of businesses saying it prevents them from adopting or expanding their AI use.[14]

These deficits are compounded by fundamental educational challenges. UNESCO notes that in some countries, 75% of students lack basic math proficiency, creating a weak foundation for building an AI-ready workforce.[140] Brazil, one of the region's most developed markets, has only 12,000 professionals with advanced AI and machine learning skills, and few universities across Latam offer specialized postgraduate degrees in AI.[8] Some estimates say that Latam has 48 percent fewer IT specialists than demand requires.[141] Latam also faces a complex talent retention challenge that threatens its AI development potential. Most countries in the region experience net outflows of AI specialists to higher-paying opportunities in North America and Europe.[142]

Current training and upskilling initiatives

The response to growing AI skills demand is gaining momentum across the region. 84% of employers in Latam plan to upskill their own workforce to meet rising demand for digital and tech talent, according to the World Economic Forum's Future of Jobs Report 2025.[143] Brazilian companies lead current AI training investment, with 62% already investing in upskilling, followed by Colombia at 53%.[4] Overall, 50% of Latin American companies are investing in AI training, with an additional 46% planning to begin such investments in 2025.[4]

Government initiatives are also scaling rapidly, with several Latin American countries having launched official AI training initiatives. Brazil's National AI Plan explicitly dedicates one of its five strategic pillars to "Diffusion, Training, and Capacity Building in AI," including scholarship programs, professional qualification initiatives, and investments in research centers to foster AI talent nationwide.[144] In Mexico, the Ministry of Labor launched a free online AI training course in 2025 titled "AI for Life and Work", offering accessible education to workers and businesses.[145] Colombia allocates around US$120 million toward enhancing research, infrastructure, ethical AI adoption, governance, and the development of AI capabilities, including the creation of a Faculty of Artificial Intelligence at the University of Manizales as part of the educational component.[146,147] The World Bank's Vincula LAC program offers 5,000 free AI and digital skills training opportunities across Latam, facilitated through partnerships with platforms like Coursera.[148]

Future workforce evolution

The trajectory toward 2030 suggests AI will become as ubiquitous in work environments as computers and internet access are today. 15% of Latin American professionals report that their organizations are currently using generative AI, 38% say their organizations plan to implement it, and another 20% are still evaluating its use.[38] That's over half of organizations either already using generative AI or preparing to adopt it. By 2030, this could approach universal adoption in skilled sectors.

According to a study from the World Economic Forum, the skills that are expected to increase in importance in the region include AI (100%), creative thinking (94%), technological literacy (88%), design (81%), and curiosity and lifelong learning (81%).[143] It is noticeable that the demand for AI-related skills will continue to soar. The fastest-growing jobs in the region include data analysts and AI and machine learning specialists, with roles expected to grow more than 50% by 2030.[143]

Open source AI as a workforce development engine

The open source AI ecosystem presents a uniquely powerful and cost-effective solution for addressing talent and retention challenges.

Accessible learning infrastructure: The availability of open source models and public source code repositories provides a training ground for students, developers, and professionals. This removes financial barriers to accessing state-of-the-art technology and allows universities and training programs to integrate cutting-edge AI into their curricula without expensive licenses.

Verifiable skill development: Open source contributions create transparent portfolios where developers can demonstrate real-world competencies through publicly accessible code and project contributions.[12] With 87.8% of hiring managers in Latam reporting difficulties in finding professionals with open source-related skills, candidates with these skills are in high demand and enjoy strong employability prospects.[149] Indeed, 81% report that experience with open source AI tools is highly valued in their field.[62]

Enhanced career satisfaction and retention: 66% of developers report that working with open source AI tools is important to their job satisfaction and 84% of hiring managers find open source culture highly effective for talent retention.[12,62]

Sectoral transformation through AI

From revolutionizing agriculture to improving efficiency in retail services, AI is providing practical solutions to real-world problems across Latam. By leveraging open models, Latam is finding affordable, locally-adapted, and reproducible AI solutions to long-standing problems, leading to increased efficiency, better outcomes, and cost reductions.

TABLE 2

AI APPLICATIONS ACROSS KEY SECTORS IN LATAM

SECTOR	CHALLENGE	THE AI OPPORTUNITY	EXAMPLES
AGRICULTURE	Agriculture contributes nearly 7% of Latam's GDP and employs tens of millions of workers, while facing pressures from climate change, resource scarcity, and feeding the global population.[150,151,157]	Irrigation optimization, crop yield prediction, early detection of pests, precision advice to farmers.[158,154]	**Kilimo:** analysis of weather and soil data for irrigation optimization; achieved 20% water savings while maintaining yields, 72 billion liters conserved.[155] Brazil's research agency **Embrapa** used open tools to develop a pest identification model that smallholder farmers access through smartphone apps.[156]
DISASTER PREVENTION	190 million people in Latam were affected by 1,534 disasters from 2000–2022: hurricanes, earthquakes, floods put millions of lives and billions in economic activity at risk.[157]	Early warning system enablement, vulnerability mapping, and real-time hazard detection.[158]	**BluEye:** a mobile app powered by Meta's Llama model that provides personalized hurricane preparedness guidance, real-time warnings, and interactive maps that function even with limited connectivity.[159]

SECTOR	CHALLENGE	THE AI OPPORTUNITY	EXAMPLES
EDUCATION	3+ million additional teachers are needed in Latam, and one-size-fits-all approaches do not serve linguistically and socioeconomically diverse student populations.[160,161]	Intelligent tutoring systems, automated grading, and adaptive learning platforms.[162,163]	**AlfaTutor:** powered by Meta's llama to help public school teachers create personalized lesson plans that work even with limited internet connectivity.[164] Uruguay's **Plan Ceibal** has systematically integrated AI-powered coding tutors into the national curriculum.[165] 370 teachers and 5,300 students developed the open **HESEIA** dataset to capture regional contexts and avoid cultural biases.[166]
ENERGY AND UTILITIES	Expanding renewable capacity creates challenges around balancing variable sources, managing aging infrastructure, and ensuring reliable power delivery.[167,168,169]	Demand forecasting, grid optimization, and predictive maintenance.[170]	**Codelco** leverages AI integration to increase annual profits by $80 million while extracting 8,000 additional metric tons of copper through optimized processing and predictive maintenance.[171]
ENVIRONMENT	Traditional environmental surveillance struggles to cover the Amazon's 5.5 million square kms, creating blind spots for illegal logging, mining, and land conversion.[172]	Real-time forest monitoring, deforestation detection, and biodiversity tracking.[173]	**Guacamaya project:** an open platform for scientific institutions to share data and coordinate monitoring efforts. Uses open source models to analyze satellite imagery, detect deforestation patterns, and track environmental changes in real-time.[135]

SECTOR	CHALLENGE	THE AI OPPORTUNITY	EXAMPLES
FINANCIAL SERVICES	Many adults in Latam lack access to formal banking.[174]	Alternative credit scoring, real-time fraud detection, automated customer service, and personalized financial products.[175]	**Kueski:** analyzes alternative data to approve microloans in minutes for customers excluded by traditional banks.[176] **Afluenta:** a credit scoring model that assesses risk for underbanked individuals and provides collaborative loan solutions.[177]
GOVERNMENT AND PUBLIC SERVICES	Traditional manual operations create bottlenecks, increase costs, and limit citizen access to essential services, while corruption and lack of transparency erode public trust.	Automated document processing, intelligent fraud detection, predictive analytics for resource allocation, 24/7 citizen service chatbots.[178,179,180]	**PROMETEA** reduces legal case processing times from 174 days to 45 days with 96% accuracy.[181,182] **GOV BR**, a Llama-2 instance fine-tuned on Portuguese government documents to assist with audit analysis and anti-corruption efforts.[179] Smart city platform **Exati** uses Llama-powered AI to help over 700 municipalities across Latam manage infrastructure more efficiently.[183] Argentina's **MIA** chatbot, built on Meta's Llama, provides SMEs and citizens faster and secure access to government services.[184]
HEALTHCARE	Rural communities often lack healthcare specialists; urban hospitals struggle with overcrowding and resource constraints.	Automated diagnostics, intelligent triage systems, telemedicine platforms, predictive analytics.[185]	**NoHarm.ai** uses Meta's Llama model to automatically generate hospital discharge summaries in Portuguese.[186,187] **Brazil's conversational assistant** achieved 95.7% accuracy in combating health misinformation.[188,189]

SECTOR	CHALLENGE	THE AI OPPORTUNITY	EXAMPLES
RETAIL AND E-COMMERCE		Demand forecasting, personalized recommendations, customer service automation, sentiment analysis	**Mercado Libre** leverages semantic search and LlamaIndex to enhance product recommendations and build a production-grade RAG stack.[190,191] **Magalu** in Brazil has deployed a conversational AI agent for customer support.[190]

Conclusions and recommendations

This comprehensive analysis presented in this report reveals that open source AI represents a strategic opportunity for Latam to leverage its unique advantages and address persistent development and socioeconomic challenges. The region demonstrates exceptional cultural readiness for AI transformation, which combined with Latam's tradition in open source software development, positions the region to fully embrace its potential in the AI-driven economy.

Understanding the combined economic and societal impacts of open source AI is a nascent area of study, particularly in Latin American economies. We recommend further research in this area to better understand how Latam is capturing value from the adoption and implementation of open models and tools. Some directions of research include how the region supports the growth and development of local ecosystems and the use of open source AI in supporting AI adoption.

This research has revealed significant economic and policy opportunities for Latam economies when it comes to AI. To help propel responsible and sustainable adoption and integration of the technology in these economies, the following strategic activities are recommended:

A clear national vision for open source AI that prioritizes the use of, contribution to, and participation in AI, open source, and open data. Policies should **incentivize sector-specific AI adoption** through government funding schemes, incentives, and top-down mandates, and specific **funding should be allocated for R&D** across the AI software and infrastructure value chain. To encourage open source AI and open data, the vision should also include a **reform of national procurement practices** to prioritize open source AI adoption, contribution, and participation. The sustainability of these activities relies on establishing **open source program offices (OSPOs)** at the agency or ministry level to support deployment of open source maintainers and contributors.

When developing regulatory frameworks, these should be forward-looking, pro-innovation, and encourage responsible development of AI. Taking a **collaborative, multistakeholder, and proportionate approach to AI regulation** ensures that society can benefit from innovation while protecting rights and freedoms, by addressing real, tangible risks without imposing broad restrictions that could limit the benefits of new technologies for businesses, entrepreneurs, and society at large. Government, industry, civil society, and academia stakeholders should be involved in driving the digital transformation of Latam.

Local workforce development and upskilling throughout the region that leans on open source projects and training and encourages the **responsible and secure use of open models and tools**. Curricula should integrate open source AI practices as well as community-led training initiatives, hackathons, and certification programs.

Investment in Latam-wide open source ecosystems to formalize regional practices for the development, adoption, monitoring, security, and evaluation of open source artificial intelligence in ways that encourage Latam developer contributions. These ecosystems should involve collaborations across the **private and non-profit sector, academia, and government**, combining the public sector's reach and ability to shape regulatory frameworks with the private sector's capacity for innovation, investment, and technical expertise. These ecosystems should focus on model and tool development as well as complementary activities around AI, such as compute resources and open datasets. In particular, partnerships with academia should be enhanced and encouraged to support dataset growth, localized model development, and other open and collaborative initiatives.

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Appendix

1. Country snapshots

Table 3 presents some statistics for Brazil, Mexico, Argentina, and Chile. For additional information about each country, we refer the reader to studies from **UNESCO** (statistics and detailed readiness assessment reports for Brazil, Mexico, Chile, and other countries in Latam), **CENIA** (most Latam countries), **Morning Consult/IBM** (Brazil and Mexico), **IPSOS/Google** (Brazil and Mexico), **Chamber and Partners** (Brazil and Mexico), and **KPMG** (Brazil).

According to **Grand View Horizon** research, Latam's total generative AI-related revenue was $348.4 million in 2024. Brazil made up 31.5% of this revenue, Argentina 20.9%, Chile 24.6%, and using the available 2023 data, Mexico made up 22.4%.

TABLE 3

COMPARATIVE METRICS OF AI ADOPTION IN LATIN AMERICAN COUNTRIES

	BRAZIL	MEXICO	ARGENTINA	CHILE
AI readiness[1]	65.89 (1st)	53.29 (4th)	56.40 (3rd)	63.19 (2nd)
Adoption score[2]	90.27 (2nd)	94.56 (1st)	73.36 (3rd)	72.66 (4th)
Data openness score[3]	69 (2nd)	76 (1st)	59 (4th)	67 (3rd)
Organizations view AI positively[4]	79% (3rd)	85% (1st)	81% (2nd)	79% (4th)
Expected impact of AI in the industry[4]	76% (2nd)	85% (1st)	69% (4th)	75% (3rd)
Organizations see results from AI[4]	52% (1st)	43% (2nd)	43% (2nd)	28% (4th)

	BRAZIL	MEXICO	ARGENTINA	CHILE
Organizations increasing AI investments[4]	62% (1st)	55% (2nd)	53% (3rd)	45% (4th)
Organizations already investing in AI training[4]	62% (1st)	45% (3rd)	48% (2nd)	37% (4th)
Areas that use AI[4]	1. Customer service (59%) 2. Marketing (40%) 3. IT (43%)	1. Customer service (64%) 2. Marketing (44%) 3. Operations (37%)	1. Customer service (69%) 2. Marketing (42%) 3. Human resources (28%)	1. Customer service (57%) 2. Human resources (39%) 3. Marketing (35%)
Main barriers[4]	1. Integration (29%) 2. Lack of AI talent (28%) 3. Business priorities (22%)	1. Integration (40%) 2. Lack of AI talent (27%) 3. Security concerns (24%)	1. Integration (30%) 2. Business priorities (22%) 3. Lack of AI talent (21%)	1. Integration (36%) 2. Lack of AI talent (29%) 3. Business priorities (22%)

(1) Source: **Oxford Insights**, values out of 100, (2) Source: Latin American Artificial Intelligence Index [**ILIA**], score out of 100, take into consideration industry and government adoption, (3) Source: **ODIN**, overall score, data last updated July 21, 2025, (4) Source: **SAP**, organizations view AI positively is the aggregate of those who answered 'absolutely' and 'Yes, although I have reservations' to the question 'Do you perceive Artificial Intelligence in a positive way?', the ranking is based on total positive responses, with 'absolutely' used as a tiebreaker, expected industry impact is the aggregate of 'little impact' and 'significant impact' to the question "To what extent do you believe Artificial Intelligence will impact your industry?", organizations see results from AI is those who answered "We are already seeing results" for the question "How long do you estimate it will take for Artificial Intelligence to impact your business efforts?", sample sizes: Brazil (300), Mexico (300), Argentina (200), Chile (200).

TABLE 4

EXAMPLES OF NATIONAL STRATEGIES IN LATAM AND THEIR STANCE ON OPEN SOURCE AI

COUNTRY	STRATEGY NAME	OPEN SOURCE AI STANCE
ARGENTINA	**Plan Nacional de Inteligencia Artificial** (2019)	- Emphasizes the need for high-quality open data, citing the country's **open data portal** and a **national plan for open government**
BRAZIL	**Estratégia Brasileira de Inteligência Artificial (EBIA)** (2021) **AI for the good of all: Brazilian Artificial Intelligence Plan (PBIA)** (2024)	- Discusses the importance of open data, citing Brazil's Open Data Policy (**Decreto 8.771/2016**). - Mentions **Brazil's Public Software Portal**, which provides a catalog of OSS for the government. - Mention the need to specify and develop a national software stack for AI, aiming to be interoperable and integrated with existing free and open software stacks, in order to optimize performance and promote technological independence.
CHILE	**Política Nacional de Inteligencia Artificial** (2021) **Action Plan: National Artificial Intelligence Policy** (2024)	- Discusses the importance of open data and mentions Chile's **portal of open data** - Proposes initiatives to update and consolidate an appropriate data governance that promotes data availability and quality - Encourages the open registry of publicly used algorithms, allowing their reuse within the government, replicating successful cases.
COLOMBIA	**National Artificial Intelligence Policy** (2025)	- Discusses the importance of open data, citing current challenges and strategies

COUNTRY	STRATEGY NAME	OPEN SOURCE AI STANCE
COSTA RICA	**National Artificial Intelligence Strategy (ENIA)** (2024)	- Emphasizes the importance of open data
MEXICO	**Agenda Nacional Mexicana de Inteligencia Artificial** (2020)	- Discusses the importance of open data, citing the country's **open data implementation guide**. - Proposes the development of open source materials for education. However, a new law prioritizes OSS solutions for the government [**Ley Nacional para Eliminar Trámites Burocráticos**], and other law proposals are under discussion [**El Economist**].
URUGUAY	**Estrategia Nacional de Inteligencia Artificial** (2024)	- Promote the creation and use of open data platforms, enabling companies, researchers, and public entities to access relevant information for developing and testing AI solutions. - Promotes the creation, improvement, and use of open source AI systems as a means to strengthen the ecosystem and open innovation, contributing to the development of various sectors and the benefit of society as a whole. - Promotes that AI solutions and platforms used by the State prioritize the adoption of international standards, with open and interoperable specifications that contribute to digital public goods as part of the digital public infrastructure. - Promotes transparency and cites the national **AI Observatory** and the **action plan for open government**. - Cites **existing law** that establishes open source as a priority and encourages the use of open AI models as elements to ensure the transparency and explainability of the systems developed, used, and acquired by the State.

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