

Trends in technological development, societal perception and legal initiatives on artificial intelligence in Latin America and the Caribbean

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Abstract: This document explores the development of artificial intelligence (AI) in Latin America and the Caribbean from four perspectives: (i) through the analysis of global and regional indices that measure the vibrancy of research, development and innovation ecosystems, as well as education and human capital training, and government readiness in terms of public policy, governance, and legal frameworks; (ii) through the identification of notable AI models that have been developed as public and private initiatives; (iii) through the interpretation of surveys that measure societal attitudes that citizens have about AI in order to gain insight regarding the extent to which they understand, accept or reject it and how they perceive it to have an impact on their lives; (iv) through the analysis of established legal frameworks or pending legislative initiatives that make it possible to identify the type of approach proposed in terms of risk management and public policy advocacy. At the end, a series of conclusions are drawn highlighting analysis of gaps, both within the region and with respect to more advanced economies, but also identifying trends in the development of local technology, social perception of AI and the development of legal frameworks.

Table of contents

1.	<i>Levels of AI development in Latin America and the Caribbean</i>	2
1.1.	The view from inside: AI pioneers, adopters, and explorers in Latin America	4
1.2.	Some notable AI models in Latin America	5
2.	<i>Societal perception of artificial intelligence in Latin America</i>	7
3.	<i>Government AI readiness in Latin America and the Caribbean</i>	11
4.	<i>Developments in legislation on artificial intelligence in Latin America</i>	14
4.1.	Countries that already have laws in place	14
4.1.	Latin American countries having draft laws on AI in progress	15
5.	<i>The development of public policies on AI in Latin America</i>	17
6.	<i>The development of infrastructures with potential for AI use in Latin America and the Caribbean</i>	19

7.	<i>Conclusions</i>	22
8.	<i>Bibliografía</i>	26

1. Levels of AI development in Latin America and the Caribbean

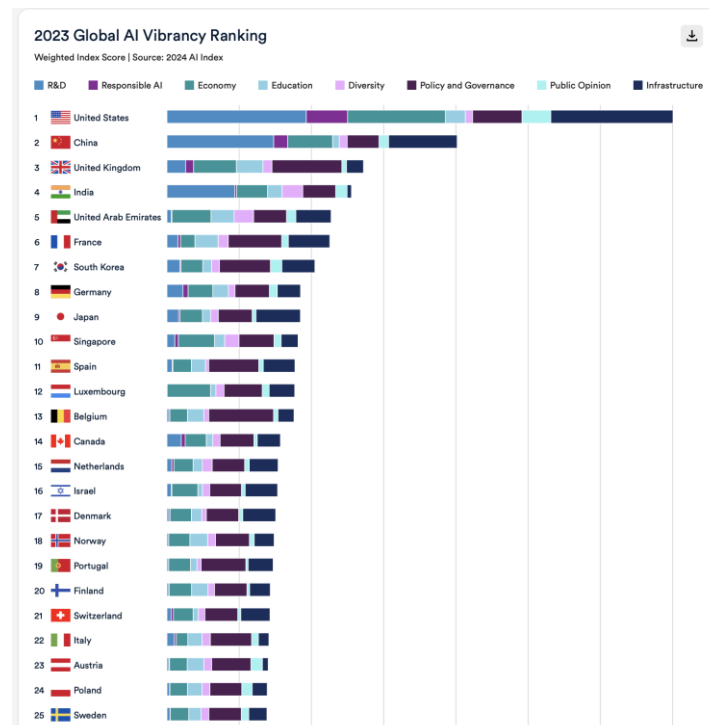
The evolution of artificial intelligence (AI) for countries at a global level can be measured using several international indices. There is, for example, the Global AI Vibrancy Tool developed by Stanford University (Stanford University, 2024), the Government AI Readiness Index from Oxford Insights (Oxford Insights, 2024), or the AI Preparedness Index from the International Monetary Fund (IMF, 2023). At the regional level, there is the Latin American Artificial Intelligence Index (ILIA) developed by the National Center for Artificial Intelligence of Chile (CENIA, 2024). This section explores some of the results obtained from these indices in order to assess how the region stands globally and to gain an understanding of how AI is developing in Latin America.

The Global AI Vibrancy index is defined as the level of activity, development and impact of AI technologies in a country. This assessment provides a comprehensive understanding of the progress that different countries are making in AI, identifying strengths and areas of potential improvement.¹ Published index data includes the 25 most advanced countries as of 2023; the list does not include a single Latin American country. The index shows that the countries with the greatest vibrancy are the United States of America, China, the United Kingdom, India, and the United Arab Emirates. In the case of the country identified as the leader in 2023 the elements of the index that contributed the most to the ranking were: (i) its research and development (R&D) capabilities; (ii) its economy; and (iii) its infrastructure. The top 25 countries in the ranking include 2 from North America, 5 from Asia, 2 from the Middle East, and 16 from Europe.

¹ The index measures eight key dimensions. Each dimension is measured with specific indicators as proxies for that dimension's contribution to the AI ecosystem:

1. **Research and Development (R+D):** Innovation in AI, measured by patents, academic publications, and the creation of new algorithms.
2. **Responsible AI:** Focused on ethics, it includes data governance, fairness, privacy, transparency, and other indicators.
3. **Economy:** Analyses the economic impact of AI, considering investments, infrastructure, applications, and labour market conditions.
4. **Education:** Measures the training of AI professionals and the growth of AI-related study programmes.
5. **Diversity:** Promotes perspectives to reduce biases; includes gender, ethnicity, and socioeconomic status in the development of AI.
6. **Policy and governance:** Defines the framework for AI through national strategies, regulations and legislation.
7. **Public opinion:** Analyses the competencies and concerns of the population in the face of AI.
8. **Infrastructure:** This is critical for AI research and deployment, and includes computational resources, data availability and network connectivity; measured by supercomputers and Internet capacity.

Figure 1.1 Global AI vibrancy ranking, 2023



Source: Figure 1 from (Stanford University, 2024)

The AI Preparedness Index of the International Monetary Fund seeks to assess AI readiness in 174 countries.² The index ranks each country with a number between 0 and 1. The index information for 2023, by regions and classifications, includes an average ranking of 0.72 for the advanced economies of the G7; 0.66 for the European Union; 0.52 for Asia and the Pacific; 0.43 for the emerging market economies; 0.43 for Latin America and the Caribbean; 0.4 for the Middle East and Central Asia; and 0.34 for sub-Saharan Africa. It is evident that the disparities in AI readiness across different regions are substantial.

A significant disparity is also revealed by a comparison of Latin American and Caribbean countries with the five leading countries in the world according to the IMF index (Singapore, Denmark, the United States of America, the Netherlands and Estonia). Chile, ranked 39th globally, is the highest-ranked country in the region, followed by Uruguay (48th), Costa Rica

² The index measures four key dimensions. Each of these is in turn measured by specific indicators:

Digital infrastructure: assesses Internet access, affordability and security, along with the maturity of e-commerce infrastructure and online public services, essential for AI adoption.

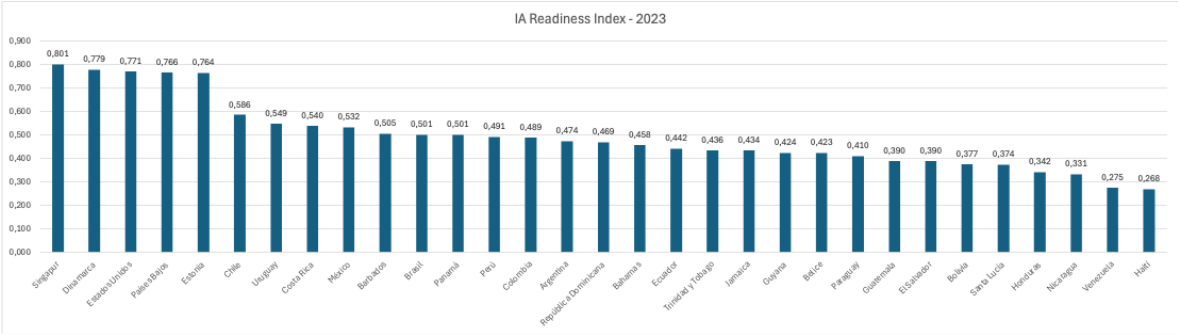
Human capital: Measures educational level, digital skills, labour market flexibility, and social protection policies, key to developing and using AI technologies.

Innovation and economic integration: Analyses R&D investment, preparedness for frontier technologies, and degree of economic integration (including tariffs and mobility of capital and people), to foster innovation in AI.

Legal frameworks: Examines the adaptability of legal frameworks to digital business models and the government's effectiveness in IA regulation and ethics.

(50th), Mexico (55th), Brazil (65th), Panama (66th), Peru (72nd) and Colombia (73rd). At the bottom of the list are Venezuela (ranked 153rd) and Haiti (155th).

Figure 1.2 AI Readiness Index – selected countries + Latin America and the Caribbean 2023



Source: Own elaboration from IMF data (IMF, 2023)

1.1. The view from inside: AI pioneers, adopters, and explorers in Latin America

At the regional level, the Latin American Artificial Intelligence Index (ILIA) developed by the National Center for Artificial Intelligence of Chile (CENIA, 2024) evaluates the degree of preparedness of countries in three key dimensions: facilitating factors; research, development and adoption; and governance.

These dimensions cover technology infrastructure, human talent development, and the governance frameworks needed to integrate AI into national economies. While remarkable progress has been made by the leading countries, the report highlights the challenges the region still faces, particularly in retaining AI talent and building strong governance frameworks that drive innovation. (CENIA, 2024)

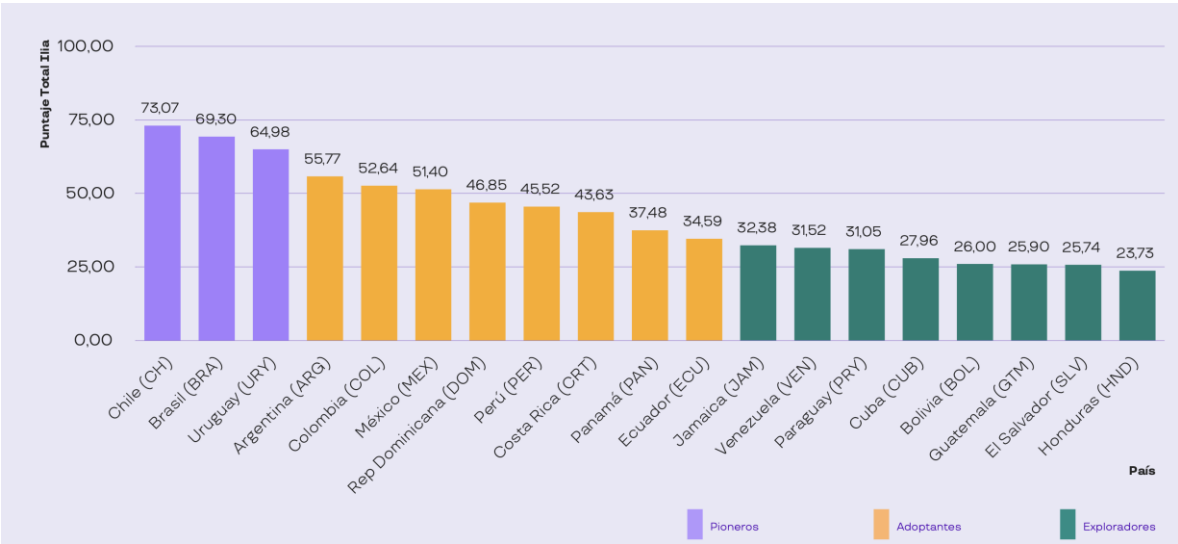
ILIA groups countries into three categories according to their level of maturity:

- **Pioneers** (ranked in the top third): Leading AI countries with advanced technological infrastructure, specialized talent, high scientific productivity, and innovation capacity. They implement AI widely and orient their national strategies to consolidate and expand AI use across sectors.
- **Adopters** (ranked in the middle third): Nations that are beginning to integrate AI into manufacturing, services and public administration. They are making research advances, but not at the level of the pioneers. They develop strategies and policies for investment and collaboration to strengthen their AI capabilities.
- **Explorers** (ranked in the lowest third): Countries at the early stages of AI adoption, with basic capabilities and limited use of the technology. They lack a well-established research community, but are beginning to push for preliminary public policy to foster future AI development.

Under this classification, Latin American countries would be ranked as follows. The leaders are Chile, Brazil and Uruguay; this contrasts with the IMF index ranking, which has

Costa Rica and Mexico ranked higher than Brazil, due to differences in the metrics used by the indices.

Figure 1.3 Latin American Artificial Intelligence Index



Source: Taken directly from (CENIA, 2024)

Among the challenges that the region faces in the AI domain, the ILIA index identified scarcity of talent and retention difficulties. There has also been an explosion in legislative initiatives, a point that is explored below: ILIA identified 38 legal projects on AI in the region under discussion or already approved. ILIA also observed that the creation of new companies (startups) within the private AI ecosystem is in its infancy and is highly concentrated in a small number of countries, reflecting the distribution of private investment in AI. ILIA therefore considers that the scarcity of unicorn companies is not surprising. (CENIA, 2024)

1.2. Some notable AI models in Latin America

Looking beyond the rankings, this paper seeks to identify specific developments and cases of AI applications in Latin America and the Caribbean that have arisen from public and private initiatives alike. To this end, a criterion is first needed to identify such developments.

This was done following the approach of Epoch AI, a research institute dedicated to the analysis of trends in AI. According to the institute's definition, a notable AI model is a machine learning system³ that meets specific notability criteria, designed to capture significant advances in terms of academic, economic, practical or historical impact. (Epoch AI, undated)

³ Understood as algorithms that learn patterns from data through techniques such as neural networks, decision trees or regression, among others. This excludes AI systems as expert systems based on rules or heuristic algorithms, unless they integrate machine learning components.

These criteria include at least one of the following: (1) more than 5 000 citations, (2) training cost over USD 1 million (2023 equivalent), (3) more than 1 million monthly active users, (4) state-of-the-art performance on a recognized benchmark, (5) historical significance, or (6) discretionary notability. (Epoch AI, undated)

However, given that the specific information on citations, costs and users is not documented in public sources for models from Latin America and the Caribbean, the evaluation presented below combines official data with inferences based on the reported impact and the regulatory context under the criterion of discretionary identification. The results of the analysis of some notable models identified as such are presented below.⁴ It includes eight cases from the public sector and seven from the private sector.

By country, two cases are from Argentina, three from Brazil, three from Colombia, two from Chile, and one each from Jamaica, Mexico, Panama, the Dominican Republic and Uruguay.

By sector, two of the cases are from the justice sector, six from the education sector, one from the environmental protection sector, three from the health sector, and one each from e-commerce, from logistics, from marketing and sales, and from the financial sector.

Among the identified AI initiatives from the private sector, three companies of regional importance stand out for their technological and business model innovations: Brazil's NuBank, Argentina's Mercado Libre and Colombia's Rappi.

Table 1.1 Some notable AI models in Latin America

Notable model	Country	Developer/institution	Description and impact
Prometea	Argentina	Public Prosecutor's Office of Buenos Aires and the Artificial Intelligence Laboratory of the University of Buenos Aires	Predictive AI system to streamline judicial processes, improving efficiency and access to justice through case analysis.
Plu	Brazil	SOMOS Educação and Amazon Web Services	AI chatbot for personalized lesson plans and educational tools, reducing teaching load and improving learning.
Gestão Presente	Brazil	Government of Brazil; Letrus	AI programme for school management and feedback to optimize resources and increase student retention.
UmmIA	Chile	Ministry of Education; CENIA	Lesson planner with AI for active learning, improving pedagogy and predictive analytics in school management.
EduIA Lab	Uruguay	Government of Uruguay; ANII	AI Laboratory for Educational Innovation, developing tools for personalized plans and dropout monitoring.
PretorIA	Colombia	Constitutional Court	AI system for judicial decisions with emphasis on explainability, facilitating equal access to justice.
Guacamaya Project	Colombia	Government of Colombia; Microsoft	AI platform for monitoring, conservation and protection of the Amazon, using satellite data for environmental predictions.

⁴ A comprehensive survey would be beyond the scope of this paper, which seeks only to show a sample of cases that can be taken as representative of the work being done in the region.

Notable model	Country	Developer/institution	Description and impact
Mexican National Center for AI	Mexico	Federal Government; CONACYT	AI centre for collaboration between industry, academia and government, developing predictive models in health and education.
AIME (Artificial Intelligence in Medical Epidemiology)	Dominican Republic	Rainier Mallol	AI platform to predict outbreaks of diseases such as dengue with 88.7% accuracy, considering environmental and physical factors, with predictions up to three months in advance.
ML fraud detection and recommendation engines	Argentina	Open market	Private AI systems for real-time fraud detection and personalized recommendations in e-commerce, filtering 98% of fraudulent advertising with an impact on the digital economy.
Nubank AI Credit Scoring	Brazil	Nubank	Private AI model for credit assessment and digital banking, using machine learning to achieve financial inclusion in underbanked populations.
NotCo Giuseppe AI	Chile	NotCo	Private AI platform "Giuseppe" focused on accelerating innovation, removing traditional barriers to R&D, and empowering brands to leverage data and management to transform the branch.
Rappi AI Logistics Optimization	Colombia	Rappi	Private AI system for route and delivery optimization in logistics, improving efficiency in package delivery through real-time predictions.
AI pilot programme for scoring examinations	Jamaica	Ministry of Education, Skills, Youth and Information	AI pilot programme set up in several schools to automatically grade exams, reducing the workload on teaching staff and improving the efficiency of educational assessment.
Dr. ROSA	Panama	National authority for government innovation (AIG)	Chatbot available via WhatsApp for an initial assessment of symptoms based on interrogation and AI algorithms, with automatic referral for professional medical attention as appropriate. It was used during the COVID-19 pandemic as a tool for screening patients.

Source: own elaboration based on: (Ministerio Público Fiscal, undated), (SOMOS Educação, 2024), (Letrus, 2024), (Ummia, undated), (Ceibal, undated), (Corte Constitucional de Colombia, 2020), (Microsoft, 2023), (Secretaría Nacional de Humanidades, Ciencias y Tecnología, 2025), (Mercado Libre, 2025), (Nubank, 2025), (Notco, 2025), (Rappi, 2024), (Patterson, 2025), (OCDE, 2020)

2. Societal perception of artificial intelligence in Latin America

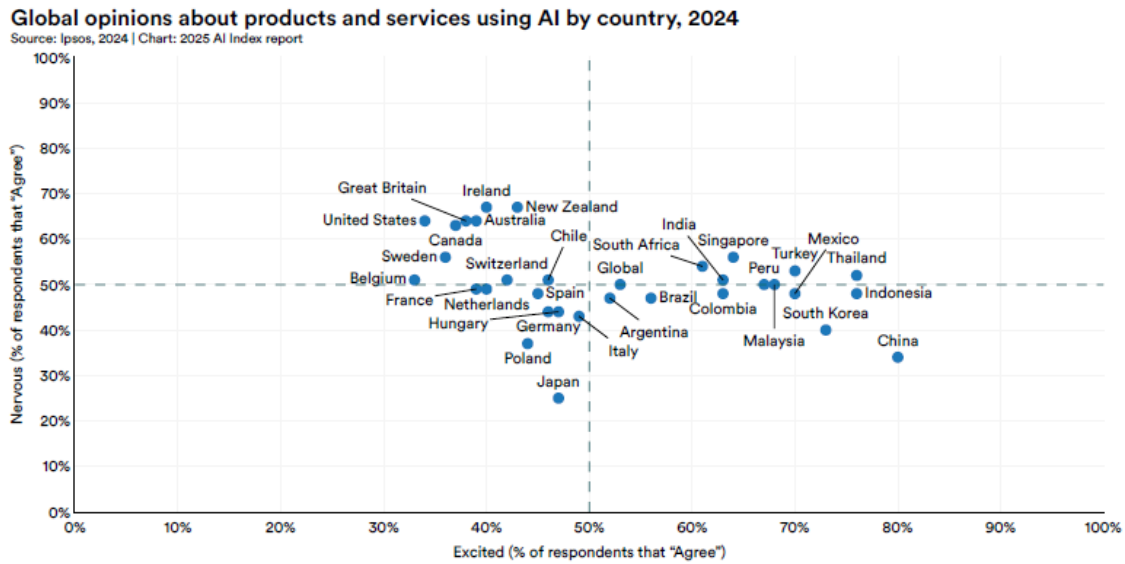
Societal perception of science and technology refers to the set of attitudes, opinions, beliefs and evaluations that society as a whole or different social groups have about science, technology and its actors (scientists, engineers, institutions and companies), and the effects

they have on daily life, the economy, culture and the environment. It refers therefore to the way in which people interpret, accept, reject or trust scientific and technological knowledge, influenced by factors such as education, the media, institutional trust and the cultural context of each country. (Bauer, Shulka, & Allum, 2012)

Whenever a new technology is introduced—such as AI, with its great potential for both economic and social disruption and the uncertainties regarding its positive and negative effects and the assessment of its risks—it is of interest to seek to understand how it is perceived in the different countries of the region. This has been done using data from the Stanford University report on the AI Index, which presents a comparison on a global basis. (Stanford University, 2025)

First, we present the country responses from survey respondents regarding the degree of excitement and nervousness with which they view AI (see Figure 2.1). Globally, many traditionally English-speaking countries, such as the United Kingdom, the United States of America, Canada, Australia and New Zealand, are among those reporting the highest levels of nervousness and the least excitement for AI. In the case of Latin America, the only country that can be placed in the quadrant where nervousness is greater than excitement is Chile, which, as we have already seen, also happens to be the most advanced country in the region in AI. By contrast, several Asian countries, such as China, South Korea and Indonesia, show both greater excitement and less nervousness. Among the Latin American countries that fall into this optimistic quadrant are Brazil and Colombia. Then there is the quadrant of nervous-but-excited, a category where Mexico and Peru are to be found alongside Thailand, South Africa and Singapore. There are no Latin American countries to be found in the quadrant of sceptics: those that are neither particularly excited nor particularly nervous, such as Japan, Germany and Spain.

Figure 2.1 Opinions regarding AI products and services, by country

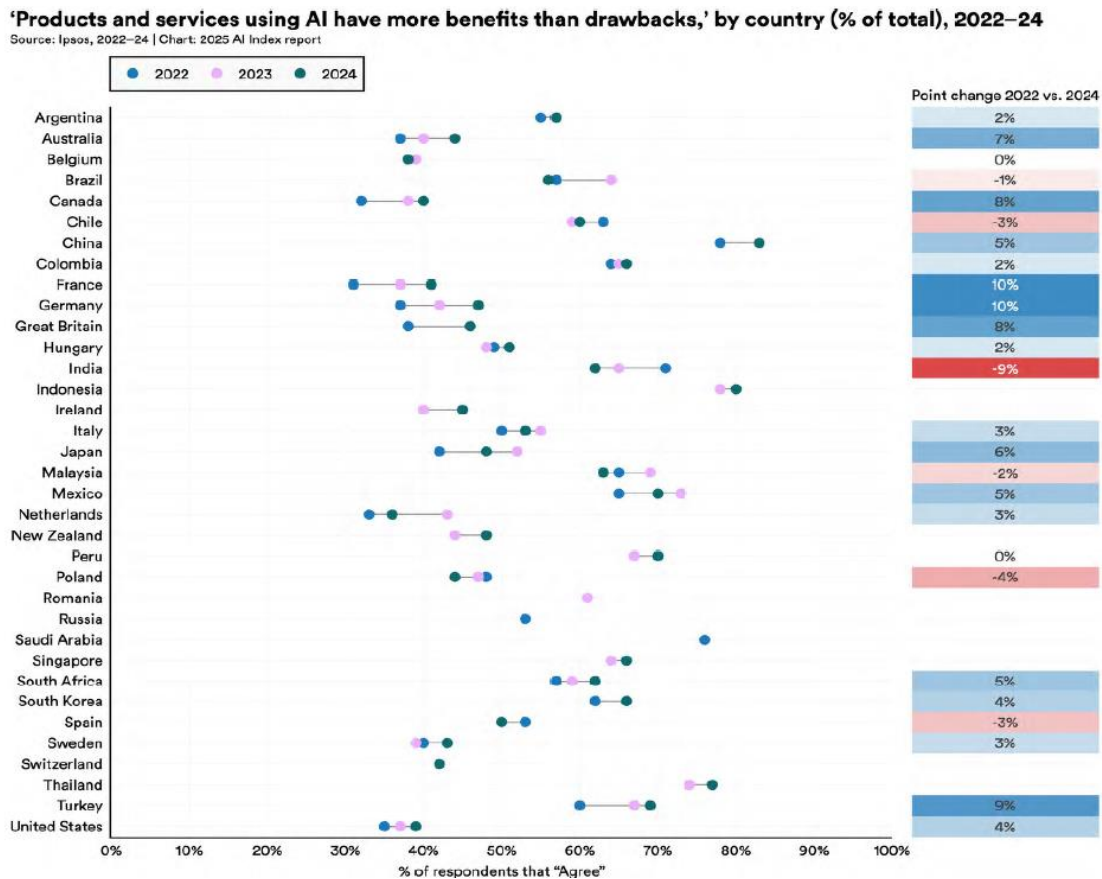


Source: Figure 8.1.4 from (Stanford University, 2025)

The Stanford University report also shows wide variation in individual countries' perceptions of the benefits and drawbacks of AI. Overall, respondents in Asia and Latin America believe that AI will have more benefits than drawbacks: for example, 83 per cent of respondents from China, 70 per cent of those from Mexico, and 62 per cent from India believe that AI products and services are more beneficial than harmful. Likewise, respondents from Argentina, Brazil, Chile, Colombia and Peru consistently reported that, for the three years studied, from 2022 to 2024, they saw more benefits than drawbacks (see Figure 2.2).

In this respect, the region contrasts with Europe and the English-speaking world, where respondents are generally more pessimistic about AI technology, although it should be noted that sentiment has been gradually warming, as can be seen from Figure 2/2.

Figure 2.2 Views on benefits vs drawbacks of AI, by country



Source: Figure 8.1.2 from (Stanford University, 2025)

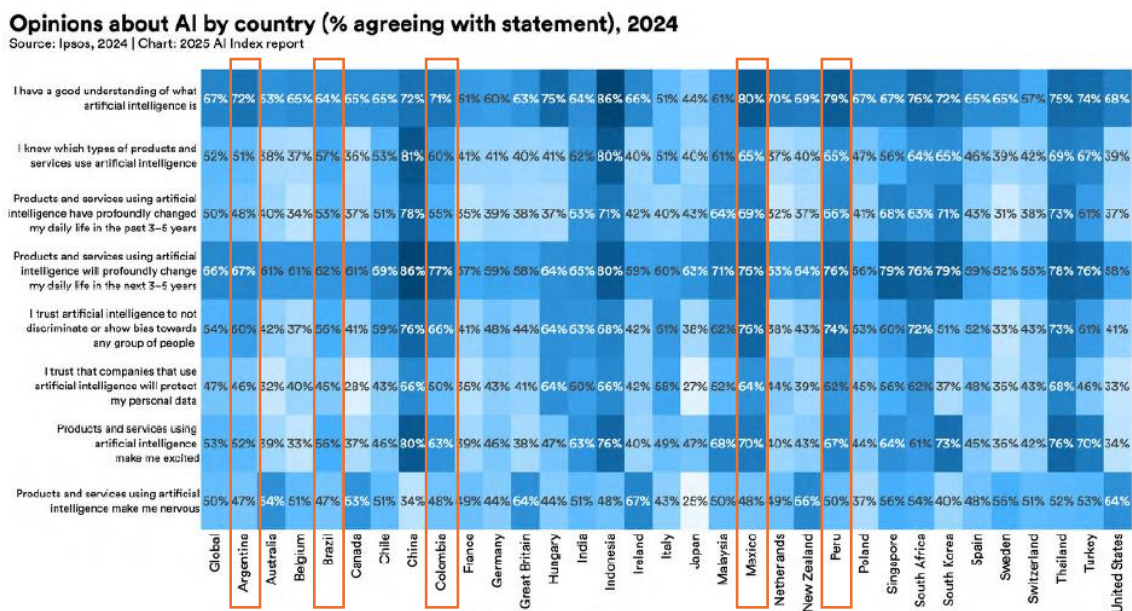
More detailed results of the survey on AI products and services by country are shown in Figure 2.3.

Among Latin American countries, Mexico showed the highest level of awareness, trust, and enthusiasm about the use of AI in products and services: 65 per cent of those respondents knew which products and services use AI, 70 per cent said they were excited about these products and services, 76 per cent trusted that AI would not discriminate or show bias, and overall 76 per cent believed that products and services using AI would profoundly change their daily lives in the next three to five years. Other Latin American countries are also excited, but to a lesser extent. For example, 62 per cent of Brazilian respondents thought AI would profoundly change their lives in the next three to five years, 57 per cent knew which products and services use AI, and 56 per cent said they were excited about products and services using AI.

However, there are concerns about the privacy of personal data. This seems to be particularly so in Argentina, Brazil and Colombia, where fewer than 50 per cent of respondents trust that companies that use AI will protect their personal data.

On the other hand, in none of the Latin American countries surveyed is there any significant concern about AI discrimination against certain groups.

Figure 2.3 Opinions about AI by country – societal perceptions of the technology



Source: Figure 8.1.3 from (Stanford University, 2025)

3. Government AI readiness in Latin America and the Caribbean

The Government AI Readiness Index from Oxford Insights (Oxford Insights, 2024) assesses the AI readiness of 188 countries, in a context where issues such as economic uncertainty and rising inequalities, if they are to be appropriately addressed by the public sector, will require stronger and more innovative capabilities and where AI is expected to play an important role.

The index seeks to understand how governments can leverage AI to improve their performance, by adopting AI effectively and responsibly so that they can deliver better services, optimize operations, and address public challenges with greater accuracy and impact.

In this way, the 2024 index explores readiness by examining 40 indicators under three core pillars: government, technology sector, and data and infrastructure. At its core, the index asks: how prepared are governments to implement AI in the delivery of public services?

The key observations of the report under each of the three pillars are set out in the following. (Oxford Insights, 2024)

Government pillar

- The number of AI strategies launched per year has increased compared to 2023, but the landscape looks more diverse.

- Global publications of AI strategies have generally declined, with fewer strategies attributed to high-income countries. However, this year also saw a notable shift, with one-half of the strategies launched or announced coming from low-income and lower-middle-income countries.

Technology sector pillar

- There is a disparity between high-income countries and others, but some large middle-income economies are closing the gap.
- High-income countries score much higher under this pillar than do countries in any other income group, with the gap between high-income and upper-middle-income countries being larger than the gaps between all other income groups combined in some cases. However, large middle-income countries outperform their income groups and rank in the top 50 globally.

Data and infrastructure pillar

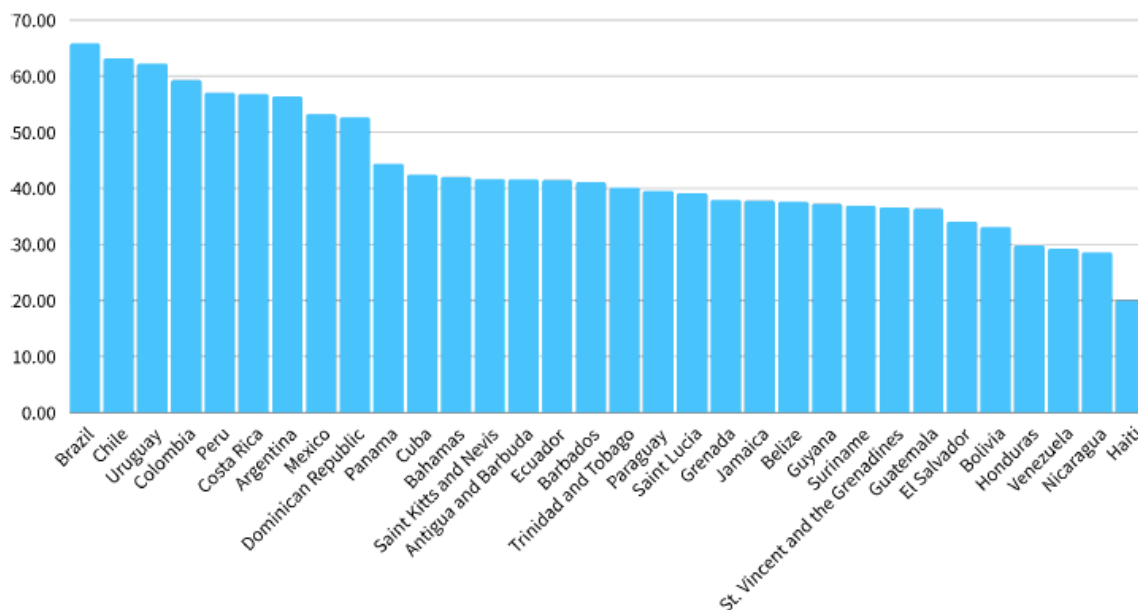
- The digital divide remains a global challenge.
- The data and infrastructure pillar highlights the persistence of digital divides, between income groups and between regions. Although generative AI offers promise for low-income countries, their lack of a solid foundation in data and infrastructure risks creating a reliance on foreign technology. Addressing these challenges is essential to foster fair and inclusive progress in AI readiness globally.

Global governance trends

- Progress on international frameworks for responsible AI increased in 2024 with the Council of Europe's AI Treaty and the Network of AI Safety Institutes.
- In 2024, global collaboration on AI governance continued to gain momentum. Regional collaboration also expanded, with agreements such as the Montevideo Declaration strengthening regional cooperation in AI governance in Latin America.

The results of the index for the countries of the region are presented below.

Figure 3.1 Government AI Readiness index 2024 – regional summary for Latin America and the Caribbean



Source: Figure 6 from (Oxford Insights, 2024)

Latin America and the Caribbean show steady progress in government readiness for AI, led by Brazil (with a score of 65.89), Chile (63.19) and Uruguay (62.21). These three countries are the only ones in the region that appear in the top 50 globally. It is worth pointing out that this coincides with the pioneering countries under the ILIA index. (CENIA, 2024)

Brazil leads the region under the governance pillar (74.51) and under infrastructure and data (78.38), driven by high data availability (84.53) and representativeness (94.6).

Chile follows, with solid results in governance and ethics (83.84), while Uruguay performs well under the government pillar (76.39).

Although the region remains below the global average, the progress of leaders such as Brazil, Chile and Uruguay shows a clear path for others to build on their emerging strengths and advance AI readiness.

However, the technology sector pillar remains a challenge, with a score of just 44.78 for the leader, Brazil, highlighting the need for further investment in technological development. (Oxford Insights, 2024)

Key developments in AI readiness in 2024

Regional collaboration on AI governance is deepening. The Montevideo Declaration, adopted at the Ministerial Summit on Ethics of Artificial Intelligence in Latin America and the Caribbean in October 2024, introduces a two-year AI Ethics Roadmap for the region.⁵

⁵ The Declaration was approved by the representatives of Brazil, Bolivia, Chile, Colombia, Costa Rica, Cuba, Curaçao, Dominica, Ecuador, El Salvador, Honduras, Jamaica, Mexico, Panama, Paraguay, Peru, Dominican Republic and Uruguay.

(Second Ministerial Summit on Ethics of Artificial Intelligence in Latin America and the Caribbean in October 2024, 2024)

It was preceded by the Santiago Declaration, a roadmap establishing priorities and policy initiatives, emphasizing the need to harmonize AI governance approaches between countries.⁶ (Cumbre Ministerial y de Altas Autoridades de América Latina y el Caribe, 2023)

National AI strategies are also gaining momentum. To renew its 2021 vision, Chile has updated its AI strategy. On the other side of the continent, Uruguay has also begun to update its own AI strategy to expand its scope. Some new entrants have also entered the field: in October, Costa Rica published its first AI strategy. (Oxford Insights, 2024)

The focus on digital government initiatives is growing. Governments are prioritizing digital transformation to improve public administration. In Mexico, the new government announced plans to create an agency dedicated to digital transformation and telecommunications (ATDT) to accelerate the digitalization of public services. Chile has launched public consultations for its 2030 digital government strategy. (Oxford Insights, 2024)

Brazil is investing heavily in AI and has committed significant funding: in July the government presented the Brazilian Artificial Intelligence Plan (PBIA), allocating BRL 23 billion (USD 4.07 billion) in public and private investments to boost technological autonomy and competitiveness in the AI sector. (Oxford Insights, 2024)

4. Developments in legislation on artificial intelligence in Latin America

4.1. Countries that already have laws in place

This section identifies countries in Latin America that have adopted laws with a specific focus on artificial intelligence. Laws whose main object is something other than AI are not included even if they possess relevance to AI.⁷

Table 4.1 Latin American countries with general laws related to AI

Country	Title of the law	Year of adoption	Main points
Peru	Law 31814 promoting the use of artificial intelligence for national economic and social development	2023	Promotes the ethical, sustainable, transparent, replicable and responsible use of AI for economic and social development. Adopts an approach to AI that is risk-based, inclusive, and based on ethical development and privacy.

⁶ The Santiago Declaration was approved by Argentina, Brazil, Chile, Colombia, Costa Rica, Cuba, Ecuador, El Salvador, Guatemala, Honduras, Jamaica, Mexico, Peru, Paraguay, Saint Lucia, Saint Vincent and the Grenadines, Suriname, Uruguay and Venezuela.

⁷ For example, in Brazil, Law 15.123 of 2025 amended the penal code to increase the punishment for the crime of psychological violence against women when it is committed through the use of artificial intelligence or other technological resources that alter the image or audio representation of the victim. Likewise, in Peru, Law 32314 amends the penal code and the law on computer crimes to cover the use of AI in the commission of crimes.

Country	Title of the law	Year of adoption	Main points
			<p>Defines artificial intelligence as a general-purpose emerging technology that has the potential to improve people's well-being, contribute to positive sustainable global economic activity, increase innovation and productivity, and help respond to key global challenges.</p> <p>Establishes the presidency of the council of ministers as the national authority, through the secretariat for governance and digital transformation, with functions of technological adoption, training of professionals and development of data infrastructure.</p>
El Salvador	Law for the promotion of artificial intelligence and related technologies (decree 23)	2025	<p>Its approach is that of a development law, promoting development, research and application of AI and similar technologies.</p> <p>Defines AI as systems or models capable of performing tasks that require human intelligence, such as perception, language processing, problem-solving, and learning.</p> <p>Establishes ethical principles of fairness, transparency, responsibility, informed consent, data minimization, inclusion and non-discrimination. Creates a national artificial intelligence agency to promote and develop AI, which will establish a comprehensive risk assessment framework for AI and similar technologies that balances technological innovation with public safety and social welfare.</p> <p>It also stipulates that the activities carried out for research, for experimental purposes or in sandboxes or test environments will not generate any liability for the people who carry them out, even in the event of unintended consequences or errors that derive from them, as long as they are not deployed commercially or directly interfere with the rights of their users.</p> <p>Regarding the use of personal data in the development, research and application of AI or similar technologies, the law stipulates that this must be carried out in accordance with the provisions of the law for the protection of personal data.</p>

Source: own elaboration based on (Congreso del Perú, 2023), (Asamblea Legislativa de El Salvador, 2025)

4.1. Latin American countries having draft laws on AI in progress

The following identifies some Latin American countries with draft laws that establish general frameworks for AI. The list is not intended to be exhaustive, but merely to illustrate cases in which initiatives are in the legislative process, especially when the bill is a government initiative (for example Chile and Colombia) or is already far advanced (for example Brazil). It also includes a parliamentary bill in Argentina.

Table 4.1 Countries with draft laws in progress to establish legal frameworks for AI

Country	Name of the bill	Year of tabling	Main points covered
Argentina	S-1368/2024	2024	<p>Establishes the legal framework for research, development, use and regulation of artificial intelligence in the national territory.</p> <p>Promotes technological innovation while protecting fundamental rights, privacy and non-discrimination.</p> <p>Includes elements on governance, risk assessment and management, data protection and civil liability for damages caused by AI systems.</p>
Brazil	PL 2338/2023	2023	<p>Provides for the development, promotion and ethical and responsible use of people-centred artificial intelligence.</p> <p>Classifies AI systems by risk levels (unacceptable, high, limited, minimal).</p> <p>Establishes users' rights, as well as obligations regarding transparency, impact assessments and oversight mechanisms.</p> <p>(Approved in the senate in December 2024, pending in the chamber of deputies).</p>
Chile	Bulletin 17.048-19 (presidential communication)	2024	<p>Regulates the use of artificial intelligence tools in the public and private sectors for the creation, development, innovation and implementation of artificial intelligence systems, which must address human needs and be respectful of democratic principles, the rule of law and the fundamental rights of people against the risk of harmful effects that certain uses could cause.</p> <p>It categorizes and regulates AI systems by risk type: unacceptable (prohibited), high (mandatory assessment), limited, and minimal.</p> <p>Proposes the creation of a technical advisory council on artificial intelligence on which ministries, agencies, academia and industry will be represented.</p> <p>Focused on establishing principles of ethics, transparency, accountability and protection of human rights.</p>
Colombia	Draft bill 043 of 2025	2025	<p>Draft law to regulate artificial intelligence in Colombia so as to ensure its ethical, responsible, competitive and innovative development.</p> <p>Establishes an approach that is territorial, ethical, inclusive, responsible and sustainable and promotes technological sovereignty and digital autonomy.</p> <p>Includes identification of regulated subjects, operational and governance principles, risk management categorization and risk classification (critical, high, subject to specific transparency obligations, and minimal or none).</p> <p>Establishes a governance mechanism designating the Ministry of Science, Technology and Innovation as the</p>

			<p>competent national authority to guide the implementation of the law and coordinate AI governance in Colombia.</p> <p>Establishes mechanisms to strengthen the AI science, technology and innovation ecosystem as well as training and social ownership of knowledge for AI.</p>
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Source: own elaboration based on: (Avila, 2024), (Federal Senate, 2025), (General Secretariat of the Presidency, 2024), (Government of Colombia, 2025)

5. The development of public policies on AI in Latin America

ITU has identified nine Latin American countries that have developed public policy instruments driven by the executive branch, defining national plans or strategies for the development of AI. Plans have been under development in some countries of the region since 2019, and are currently in place in Argentina, Brazil, Colombia, Costa Rica, Chile, Mexico, Peru, the Dominican Republic and Uruguay.

Each country has defined its own distinctive elements, but there is a set of common elements:

1. Aspects related to the definition of AI and the international situation in terms of the development of the technology and its regulatory elements.
2. Identification of enablers for national AI development:
 - a. qualified human resources
 - b. private and public data
 - c. technological infrastructure
3. Identification of elements associated with governance, regulation and cybersecurity
 - a. governance
 - b. legislation, regulation and ethical use
 - c. cybersecurity
 - d. public safety and security
 - e. risk management
 - f. relevant international standards, (mainly ISO/IEC)⁸
4. Identification of aspects related to the implementation of AI technology and its social impact
 - a. public sector implementation of AI
 - b. private-sector implementation of AI
 - c. impact on the labour market
 - d. digital commerce and consumer relations
 - e. research, development and innovation
 - f. international cooperation
5. Establishment of the structural elements of the plan at the country level
 - a. national vision

⁸ International Organization for Standardization, International Electrotechnical Commission

- b. national objectives
- c. strategic objectives, action lines, human and financial resources, timetables and specific goals
- d. performance metrics

Below is a table identifying the Latin American countries that have established public policies for AI, the direct beneficiaries of such policies, and the year of adoption.

Table 5.1 Latin American countries with public policies in place for AI

Country	Document name	Beneficiaries	Year of adoption
Argentina	National AI plan	Higher education institutes, public research institutes, recognized researchers, businesses, national government, entrepreneurs and civil society	2019
Brazil	Brazilian artificial intelligence strategy	Higher education institutes, public research institutes, private research and development laboratories, postdocs and other early-career researchers, undergraduates and master's students, high school students, doctoral students, professors, companies of any size and age, incubators, accelerators and centres, industry associations, academic societies/academies, international entities, national government, subnational government, entrepreneurs, general workforce and workers	2021
Chile	National AI policy	Higher education institutes, public research institutes, private research and development laboratories, established researchers, postdocs and other early-career researchers, undergraduates and master's students, high school students, doctoral students, professors, companies of any size and age, incubators, accelerators and centres, technology transfer bodies, industry associations, academic societies/academies, national government, general workforce and civil society	2021
Colombia	National policy for digital transformation and artificial intelligence	Higher education institutes, public research institutes, private research and development laboratories, enterprises of any size or age, incubators, accelerators and centres, national government, departmental and municipal governments, entrepreneurs, private investors, general workforce, and civil society	2019
Costa Rica	National artificial intelligence strategy (ENIA)	Private sector organizations, academia and education, civil society.	2024
Dominican Republic	National artificial intelligence strategy	Researchers, developers, academics and scientists, startup incubators and accelerators, universities and research centres, technology companies and different industrial sectors, NGOs with a focus on technology and development, chambers of commerce, government agencies, professional associations and unions, non-profit organizations focused on education and training, research laboratories, technology parks and innovation clusters, investment funds and venture capital, international organizations and communities of practice.	2023
Mexico	Mexican national AI agenda	Public research institutes, private research and development laboratories, enterprises of any size or	2020

Country	Document name	Beneficiaries	Year of adoption
		age, national government, subnational government, general workforce and civil society	
Peru	National AI policy	Higher education institutes, public research institutes, private research and development laboratories, established researchers, companies of any size or age, academic societies/academies, international entities, national government, subnational government, women and workers	2021
Uruguay	AI strategy for digital government	National government	2020

Source: ITU, based on (Presidency of Argentina, 2019) (Ministry of Science, Technology and Innovation of Brazil, 2021) (Ministry of Science, Technology and Innovation of Chile, 2021) (National Planning Department of Colombia, 2019) (Ministry of Science, Innovation, Technology and Telecommunications of Costa Rica, 2024, 2024) (Government of the Dominican Republic, 2023) (IA2030MX Coalition, 2020) (Presidency of the Council of Ministers of Peru, 2025) (Uruguay Agency for E-government, the Information Society and Knowledge, 2020)

6. The development of infrastructures with potential for AI use in Latin America and the Caribbean

As shown by the developments in public policy on AI in Latin America (see chapter 5 above), the main enablers that have been identified for AI are human resources, public and private data, and technological infrastructure. For the latter, the most important points are the existence of data centres, access to processors with AI capabilities (graphics processing units or GPUs) and the availability of energy.

Start with the processors. The supply chains that allow the manufacture of the most advanced chips used for artificial intelligence models are concentrated in a few companies that control fundamental parts of the process. For example, the United States of America has Nvidia, which is a leading company in the design of the advanced GPUs that are used for AI. The Netherlands has ASML (Advanced Semiconductor Materials Lithography), a company that manufactures the machine tools that are used in chip foundries. The final manufacture of the most advanced chips has TSMC (Taiwan Semiconductor Manufacturing Company) as a key protagonist. (Miller, 2024)

The United States has a provision known as the Foreign Direct Product Rule (FDPR) that subjects foreign-made items that are direct products of technology or software of US origin to export controls. In application of this rule, some countries are denied access to the most advanced AI chips. (Department of Commerce of the United States, 2024). Most countries in Latin America are free of general restrictions, as long as they do not deal with restricted entities or prohibited end uses, such as military uses. However, if the chip is produced abroad with US technology, FDPR could apply to any attempt to re-export it to restricted countries.

Next, electrical energy. Currently there is a boom in the construction of data centres for the development and operation of AI. In the United States alone, Meta, Alphabet, Amazon and Microsoft invested a combined total of USD 180 billion in 2024. These investments are in addition to the 11 000 data centres already operating worldwide, collectively consuming 55 GW of power. For an idea of what that means, the installed capacity of Colombia is

20.86 GW. So the power consumption of the world's data centres is 2.6 times as high as the entire installed capacity of a country with a population of 53 million. (The Economist, 2025) (XM, 2025)

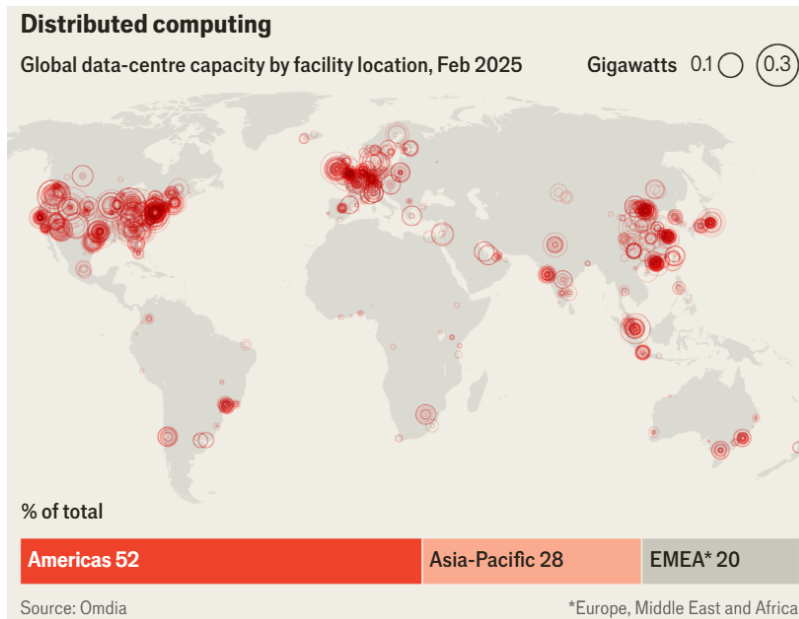
The next point is the distribution of data centres. To give an approximate idea of this point, Figure 6.1 shows global distribution of data centre capacity, using their energy consumption as a proxy. (The Economist, 2025). It can be seen that capacity is concentrated in the Americas region, with 52 per cent of the total, followed by the Asia-Pacific region with 28 per cent and then Europe, the Middle East and Africa with 20 per cent. However, in the Americas, most of that capacity is within the United States. In Latin America, data centres are predominantly to be found in Brazil, with some in Mexico, Chile, Argentina and Colombia.

As a complement to the above information, publicly available data (PeeringDB, 2025) identifying and locating data centres and Internet traffic exchange points (IXPs) was used to generate a map of the potential presence of AI-relevant infrastructure in the Latin America and Caribbean region. The results are depicted in Figure 6.2. It is important to mention that these data are a first approximation, because: (i) they combine data centres and IXP points, and (ii) the information has not been subjected to a detailed review. This map is thus being presented merely as an overview of the development of infrastructure with potential AI relevance in the region.

What can be observed is a situation similar to that shown in the first figure, with the highest concentration of infrastructure in Brazil, Mexico, Argentina, Chile and Colombia. However, potentially relevant infrastructure is also identified in other South American countries (Ecuador, Venezuela, Peru, Bolivia, Paraguay, Uruguay, Suriname and French Guiana), in Central America (Guatemala, Costa Rica and Panama) and in the Caribbean (Dominican Republic, Bahamas, Trinidad and Tobago, Guadeloupe (France) and Curaçao (Netherlands)).

A word of caution: the existence of data centres in the Latin America and Caribbean region does not necessarily mean that the servers are fitted out with AI-capable GPU processors. It only means that there is infrastructure that could be relevant for the development of AI in the region.

Figure 6.1 – Global distribution of data centre capacity based on their energy consumption



Source: (The Economist, 2025)

Figure 6.2 Georeferenced identification of potentially AI-relevant infrastructure in Latin America and the Caribbean



Source: Own elaboration, (PeeringDB, 2025)

Finally, it is worth mentioning that ITU, through its Telecommunication Development Bureau (BDT), Digital Networks and Environment Department (DNE), Future Networks and Spectrum Management Division (FNS), is working on a major project to map the

infrastructure of information and communication technologies. (ITU - BDT/DNE/FNS, 2025) The project focuses on broadband networks, which are of significant importance for AI adoption because, without access to the Internet, the population also has no access to AI technology. Gaps in access to Internet thus become gaps in access to AI, exacerbating the technological divide that already separates those who are connected from those who are not.

7. Conclusions

The following conclusions may be drawn from this analysis.

1. The evidence derived from the international indices shows that **not one of the countries in Latin America and the Caribbean is in a global leadership position for AI development.**
 - a. In particular, the indicators that measure the vibrancy of the research, development and innovation ecosystems, as well as education and human capital training, show that the countries of the region occupy at best an intermediate position in the global rankings. This is the case for the AI vibrancy ranking of Stanford University or the AI readiness ranking of the IMF, for example.
 - b. According to the IMF index, the region of Latin America and the Caribbean, with an average score of 0.43, lags significantly behind the advanced economies of the G7, which have an average score of 0.72, and also behind the European Union, with 0.66, and the Asia-Pacific region, with 0.52.
2. At the regional level, **the Latin American Artificial Intelligence Index identifies three countries in Latin America that are AI pioneers: Chile, Brazil and Uruguay.** A second group consists of the eight countries categorized as technology adopters: Argentina, Colombia, Mexico, the Dominican Republic, Peru, Costa Rica, Panama and Ecuador.
 - a. According to the index, the main difficulties for the development of AI in Latin America are related to the scarcity of talent and difficulties in retaining it, as well as the modest levels of private investment.
3. Despite the above, it is encouraging to note that there are **numerous examples of notable AI models in the region**, with two cases from Argentina, three from Brazil, three from Colombia, two from Chile, and one each from Jamaica, Mexico, Panama, the Dominican Republic and Uruguay.
 - a. These models have emerged from both public initiative (especially in the justice, education and health sectors) and private initiative (e.g. in e-commerce, logistics and banking).
 - i. Among the private initiatives, some of the companies that stand out in the region for their levels of innovation are NuBank from Brazil, Mercado Libre from Argentina and Rappi from Colombia.
4. Based on the Ipsos survey cited in the Stanford University studies, it is observed that **the social perception of AI in Latin America is generally positive with respect to technology**, highlighting the following aspects:
 - a. The only country where the nervousness measure is greater than the enthusiasm is Chile.

- b. All countries included in the survey (Argentina, Brazil, Colombia, Chile, Mexico and Peru) tend to perceive more benefits than drawbacks in AI.
 - c. The biggest concern that AI seems to generate in the surveyed Latin American countries is the privacy of personal data.
 - i. This seems to be particularly so in Argentina, Brazil and Colombia, where fewer than 50 per cent of respondents trust that companies that use AI will protect their personal data.
5. According to the Oxford Insights index, **in recent years the region of Latin America and the Caribbean has seen steady progress in government readiness for AI.**
- a. For this index, the region is led by Brazil (65.89), followed by Chile (63.19) and Uruguay (62.21). These three countries are the only ones in the region that appear in the top 50 globally.
 - b. However, the technology sector pillar remains a challenge for the entire region, with a score of just 44.78 for the leader, Brazil, highlighting the need for further investment in technological development.
6. In terms of legal developments, **only two countries have general laws related to AI (Peru and El Salvador), but at least three others (Brazil, Chile and Colombia) have bills in progress that are either at a very advanced stage or government-initiated.** There are some common elements in these existing or proposed legal frameworks:
- a. In some cases, there are clear messages to promote AI under scientific, technological and innovation considerations.
 - b. In many cases, AI classifications and regulations are established according to the types of risks. Risks are commonly assessed at levels of severity, and the use of the riskiest AI is often prohibited.
 - c. In many cases, national AI governance mechanisms are being proposed.
 - d. There is a common approach towards establishing ethical principles in the development and deployment of AI.
 - e. A common feature is the protection of users' personal data in the development and use of AI.
7. ITU has identified nine Latin American countries that have developed **public policy instruments** driven by the executive branch, defining national plans or strategies for the development of AI.
- a. Plans have been under development in the region since 2019 in some countries, and are currently in place in Argentina, Brazil, Colombia, Costa Rica, Chile, Mexico, Peru, the Dominican Republic and Uruguay.
 - b. Some of the common elements in these planning processes at the national level include:
 - i. aspects related to the definition of AI and the international situation
 - ii. identification of enablers for national AI development
 - iii. identification of elements associated with governance, regulation and cybersecurity
 - iv. identification of aspects related to the implementation of AI technology and its social impact
 - v. establishment of the structural elements of the plan at the country level.

8. For **AI-enabling infrastructures**, three important elements are identified, namely the availability of chips, the availability of energy, and the availability of data centres.
 - a. There are **export controls on advanced GPU processors** that are used for AI, but most countries in Latin America are not subject to general restrictions.
 - b. **Data centres are intensive users of electrical energy.** As of February 2025, there were more than 11 000 data centres collectively consuming 55 GW of power. For comparison purposes, this is 2.6 times as high as Colombia's entire installed capacity.
 - c. **Most data centres are located in the United States.** In Latin America, the biggest concentration of data centres is in Brazil, with some others in Mexico, Chile, Argentina and Colombia.
 - i. At a more micro level, there is evidence of some AI-relevant infrastructure in most countries in Latin America and the Caribbean.
 - ii. A word of caution: the existence of data centres in the Latin America and Caribbean region does not necessarily mean that the servers are fitted out with AI-capable GPU processors. It only means that there is infrastructure that could be relevant for the development of AI in the region.
 - d. **Gaps in access to the Internet become gaps in access to AI**, exacerbating the technological gaps that already separate those who are connected from those who are not.

As a separate matter, although it does not directly correspond to the purpose of this analysis, it is worth mentioning that ITU has important resources that can be leveraged by the countries of Latin America and the Caribbean in the development of their public policies and legislative and regulatory initiatives. Two resources are described in the following.

ITU has a **Digital Regulation Platform**, (ITU, 2025) which includes resources for AI. Here are some of them:

1. An analysis of the challenges of transformative technologies such as AI and regulatory principles.
 - a. The **main challenges for AI technologies** are identified as follows:
 - i. the unpredictable nature of business models that rely on transformative technologies
 - ii. data privacy, security, ownership and control
 - iii. the AI conundrum, which consists of the difficulty of regulating systems that operate as black boxes because they were trained rather than programmed, generating challenges in compliance, security and accountability.
 - b. In turn, **principles are established for AI regulation**, which include:
 - i. Innovative and adaptive: Foster regulatory models that adjust quickly to technological change through trial and error and collaboration, using tools such as policy labs and regulatory testing spaces.
 - ii. Outcome-focused: Establish rules that prioritize measurable and desirable results, giving the private sector flexibility in how to comply and facilitating technological innovation.

- iii. Evidence-based: Use real-time data flows between regulators and companies as well as risk-based approaches to assess compliance, enabling dynamic and automated regulation.
 - iv. Collaborative: Promote cooperation between regulators from different countries and sectors, including public-private partnerships, to foster innovation and protect consumers, involving multiple stakeholders in governance.
2. A **practical roadmap for national AI governance** comprising eight main steps:
- a. Foundational readiness: establish a national understanding of AI and define a shared vision.
 - b. Building the architecture: identify institutions and create coordination mechanisms at the national level.
 - c. Assessing the landscape: evaluate legal, institutional and technical environments to identify gaps.
 - d. Designing the framework: elaborate a national AI governance strategy and a legal framework aligned with international norms and standards.
 - e. Empowering institutions: establish or strengthen institutions and build capacities.
 - f. Activating governance: set up policy instruments and enforcement tools.
 - g. Ensuring adaptability: implement monitoring, evaluation and iteration based on impact analysis.
 - h. Looking ahead: future-proofing and international collaboration – create units for emerging issues, join global alliances and collaborate on international safety protocols.

ITU also has **best practice guidelines for transformational technologies**, the most recent being those that came out of the Global Symposium for Regulators at Riyadh in 2025 (ITU-GSR, 2025). These issue a series of recommendations, including in particular the following:

1. **Empowering regulators as digital ecosystem builders.** Regulators should adapt and embed innovation as a core part of their institutional mission to help shape resilient, future-ready digital ecosystems (ITU-GSR, 2025). This process can advance through a series of directions, including the following:
- a. Empower regulators to give them the tools to deal with the digital realities. This means ensuring that **regulatory mandates** reflect convergence across infrastructure, content and services.
 - b. Strengthen regulatory capacity for **evidence-based and risk-informed decision-making.**
 - c. **Institutionalize experimentation** in order to test regulatory responses before codifying rules in high-risk or high-uncertainty areas by using sandboxes, living labs, simulations and scenario tools.
 - d. Use **regional and international partnerships** to address common challenges and shared priorities, from spectrum coordination to cybersecurity to AI governance.
 - e. Ultimately, **the goal** is to strengthen public trust, credit the specific role of regulators, protect public interests, foster digital development, and reinforce the collective ability to govern a connected, dynamic and interdependent digital world.

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