

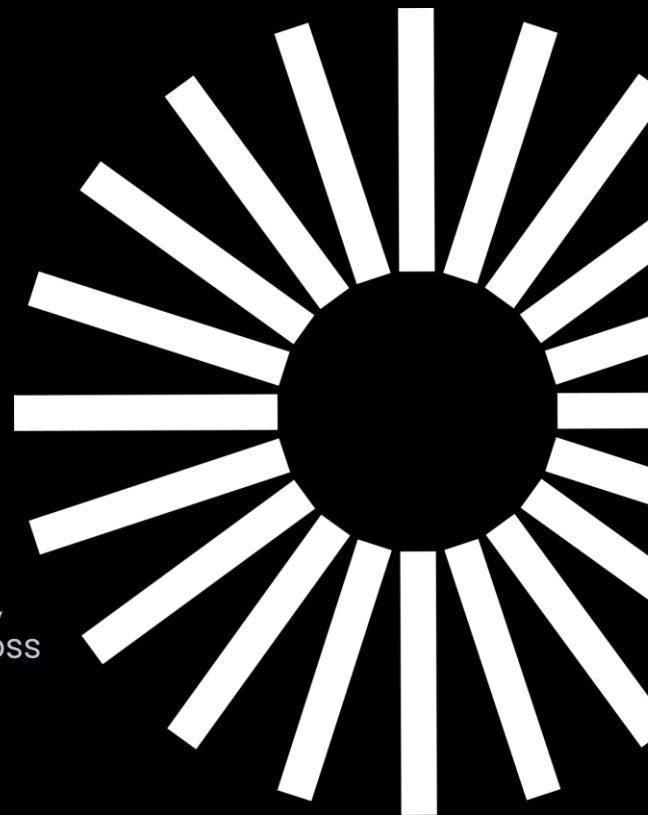
# Who captures value in the AI economy?

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A structural transformation reshaping competitiveness, productivity, labour markets and the distribution of economic opportunity – across every sector, at unprecedented speed.

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# Beyond technology: a structural transformation

The current digital and AI revolution is reshaping competitiveness, productivity, labour markets and the distribution of economic opportunity — simultaneously, across every sector, at unprecedented speed.

## PRODUCTIVITY

**+0.036%**

### GDP growth

In LAC, a 1% increase in AI spending is associated with GDP growth of 0.036%.

## GROWTH

**+US\$5 bn**

### Brazil & Mexico

AI's annual GDP impact is estimated to exceed US\$5 billion in both Brazil and Mexico.

## LABOUR & OPPORTUNITY

**2 – 7%**

### of jobs highly exposed

Between 2% and 7% of the labour force is highly exposed to AI.

THE GAP THAT FRAMES  
THE STAKES

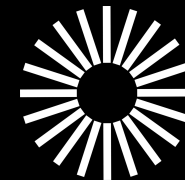
**1/3**

**of OECD labour productivity**

*LAC's productivity gap with OECD has not closed in two decades — and has widened in lower-dynamism economies.*

**WITHOUT ACTIVE POLICY:**

*AI deepens the asymmetries it could resolve.*



# LAC consumes the digital economy — but barely produces it

Without deliberate policy, the structural lag in adoption, exports and AI investment locks LAC into a low-adoption / low-growth equilibrium.

**9.1%**

vs OECD 20.2%

**Enterprise AI adoption**

Denmark 42% · Finland 38%

**1.6%**

vs Europe 48% · Asia 32%  
**Of global ICT-services exports**

LAC totals US\$ 19.5 bn (2024)

**2.6%**

of global AI demand · 6.3% of GDP

**Demand asymmetry**

Spending: US\$ 11.3 bn LAC vs US\$ 251.7 bn NA

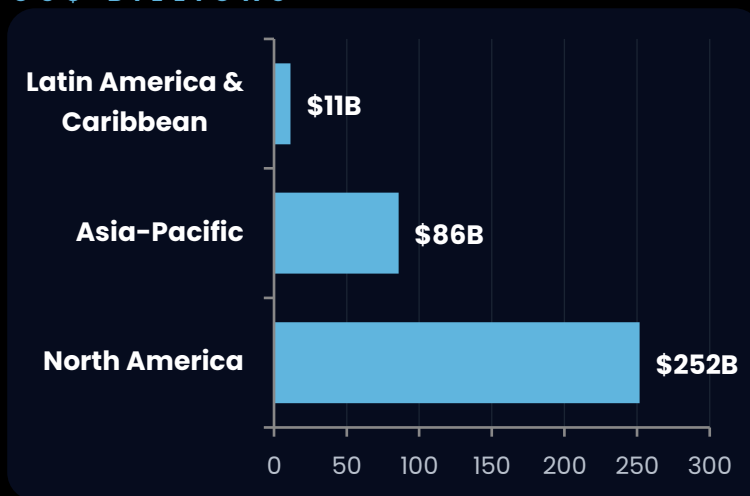
**14%**

of global AI traffic · 11% of users

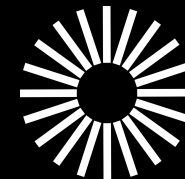
**Consumer, not producer**

High consumption, scarce local value generation

AI SPENDING BY REGION · 2025 · US\$ BILLIONS



LAC captures 2.6% of global AI investment — 3× below the world average per unit of GDP.



# From diagnosis to action: three priorities to seize the opportunity

Adoption alone will not deliver structural transformation. Three policy priorities — drawn from ILIA 2025 — determine whether the region captures the AI and digital opportunity.

1

## Enabling Factors

The digital divide has shifted — skills, data and compute sovereignty are the new gap.

13 / 19

countries lack AI in school curricula

11 / 19

countries with no AI doctoral programmes

*Risk of permanent under-specialisation in regional talent.*

2

## Research, Development & Adoption

Concentrated, but policy-movable. Gen AI shows LAC can leap past industrial constraints.

68%

of AI researchers concentrated in 2 countries

Top 3

globally in Gen AI downloads (15–20%)

3

## Governance

From plan to action — and from rule-taker to rule-shaper.

9 / 19

national AI strategies — most without budget or KPIs

GDC · WSIS+20: barely any LAC representation

*Limited influence on the global rules being written now.*

Close the skills gap, mobilise R&D, shape the rules — **the difference between seizing the crossroads or remaining trapped.**