



UNLOCKING CHILE'S AI POTENTIAL 2026

The next wave of AI is here

Chile's AI journey has reached a defining moment. **45%** of businesses across the country now use AI, and AI is becoming a mainstream capability across the Chilean economy, helping businesses compete more effectively, invest with greater confidence, and unlock new opportunities for growth. This rapid progress places Chile in a strong position to harness the next generation of AI technologies and their transformative economic potential.

[Unlocking Chile's AI Potential 2025](#) showed that AI adoption was accelerating rapidly, but relatively few organisations had progressed to AI's most advanced and transformative applications. The 2026 research finds that this trend has remained and evolved. As AI adoption becomes increasingly widespread and tools become increasingly capable and innovative, the focus now shifts beyond who is using AI to how organisations can realize its full potential.

As the next generation of AI, including agentic AI and physical AI, begins to emerge, businesses will need more than access to the technology alone. Success will depend on their ability to build the foundations needed to deploy advanced AI at scale: measuring business value, accessing trusted and flexible cloud and AI ecosystems, developing workforce capability, providing clear leadership, and preparing for sophisticated AI technologies. Businesses are already realizing value from AI, but those that strengthen these foundations will be best placed to accelerate innovation and capture the full economic benefits of the next wave of AI.

These foundations are being built within an evolving regulatory environment. As Chile's AI Bill moves through the Senate, businesses are looking for the clarity and stability needed to invest with confidence; **74%** say clarity on regulation is very or critically important to their adoption and innovation with AI. At the same time, the cost of compliance is rising. Businesses now allocate an average of \$21 of every \$100 of technology spend to regulatory compliance, up from \$19 last year, and **66%** expect this proportion to increase further over the next three years. A clear, innovation-friendly regulatory environment will therefore be central to sustaining Chile's AI momentum.

This year's research looks beyond AI adoption to examine the capabilities that will shape Chile's next phase of AI-driven growth. It explores readiness for next-generation AI technologies, choice and flexibility in the AI landscape, workforce capability, leadership and organisational readiness, and the growing importance of measuring AI's value. The question is no longer simply how many businesses are adopting AI, but how Chile can build on today's momentum to unlock its full economic potential.

Key findings

- AI adoption has reached a new milestone, with **45%** of businesses now using AI, up from **35%** last year, a year-on-year growth rate of **29%**
- Adoption is accelerating in volume terms: around 220,000 businesses in Chile adopted AI in the last year – more than one every three minutes, and ahead of last year's intake of around 171,000 – bringing the total number of firms using AI to more than 990,000¹
- Many businesses are not yet ready for the next generation of AI. Only **18%** feel ready to adopt technologies such as agentic AI, rising to **39%** among startups
- A digital divide persists. Only **17%** of adopters have reached the most transformative stage of AI integration, against **46%** of startups
- Cloud has become a critical foundation for AI adoption, with **72%** of Chilean businesses now using cloud technologies
- Businesses are seeing value from AI, but many struggle to measure it. Only **14%** are very confident in their ability to accurately measure AI ROI
- Skills remain one of the biggest barriers to AI adoption. **48%** of businesses cite shortages in AI and digital skills as a barrier to adopting or expanding AI
- Businesses want AI regulation that builds trust and provides certainty without slowing innovation. **74%** say clarity on AI regulation is important to supporting their AI adoption and innovation, yet only **24%** feel confident enough in its stability to make business plans, as compliance costs continue to rise

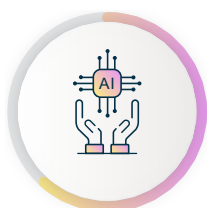




Tracking Data: AI adoption in 2026

AI adoption in Chile continues to accelerate. **45%** of businesses now report using AI, up from **35%** in 2025, a year-on-year growth rate of **29%**. Cloud adoption stands at **72%**, reflecting continued investment in the digital foundations needed to support AI.

Businesses are placing AI at the centre of their long-term strategy:



62% identify AI adoption as a top or high priority, above all other technologies



69% of adopters say AI plays a critical or important role in their overall business strategy

Investment is growing as organisations move from experimentation toward longer-term deployment: **82%** of adopters say their AI investment has increased over the past year, and **47%** now have a dedicated AI budget. Among those with a dedicated budget, an average of **13%** of the overall IT budget currently goes to AI, rising to an expected **21%** within three years.

Investment is translating into business value. Among adopters, **92%** report productivity gains, with **58%** describing these as transformative or significant. Gains are strongest in financial services (**97%**), followed by information & communication (**96%**) and retail (**94%**). Looking ahead, **87%** say their AI adoption is very or somewhat likely to increase their growth in the next year.

Adoption varies across the economy. Startups lead the way, with **64%** leveraging AI in some way across their business, up from **52%** last year, compared with **43%** of SMEs and **56%** of large businesses. By sector, information & communication leads (**68%**), followed by financial & insurance activities (**61%**) and professional, scientific & technical activities (**57%**).

While adoption is widespread, many organisations remain at the early stages of their AI journey: among adopters, **44%** describe themselves as exploring or experimenting with AI, while only **9%** say AI is fully integrated, embedded in their operations and at the centre of their strategies for growth and innovation.

The ongoing digital divide

While **45%** of businesses have now adopted AI, celebrating adoption figures alone risks masking an underlying trend. The gap identified in last year's report has widened: looking deeper into how businesses are implementing AI, from initial adoption to advanced use for transformation, most organisations still remain at the earlier stages:

Basic AI adoption

58% of adopters remain focused primarily on more basic uses of AI and on incremental gains – using publicly available chatbots or basic AI tools for routine tasks, or purchasing ready-made AI solutions from external suppliers – rather than innovation. The construction sector remains concentrated at the basic stage of AI adoption (**70%**), followed by the transport & logistics sector (**66%**), and the manufacturing sector (**63%**)

Intermediate AI adoption

25% have advanced to the intermediate stage, integrating AI into products or services they are offering to their customers

Advanced AI adoption

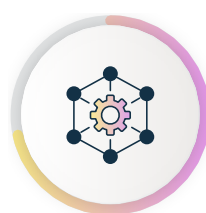
17% of adopters have reached the most transformative stage of AI integration (up from **13%** last year) – utilising advanced AI systems that combine multiple models or tools for complex tasks, creating their own custom AI systems or apps, or deploying agentic or autonomous AI systems that plan and act with limited human oversight. Startups lead the way with **46%** at this stage, contrasted by **14%** of SMEs and **19%** of large enterprises. By sector, financial services leads advanced AI uptake (**26%**), followed by information & communication (**24%**), and retail (**20%**)

This suggests that for many organisations, AI adoption remains concentrated in pilots, productivity tools, or isolated use cases rather than driving broader business transformation – demonstrated by the fact that only **24%** of adopters have launched new AI-driven products or services.

At the same time, appetite for further adoption is strong:



58% of all businesses expect to be consistently using AI tools in twelve months' time, up from **45%** today



72% believe AI will completely transform their industry or transform large parts of it in the next five years – recognizing the value the technology holds

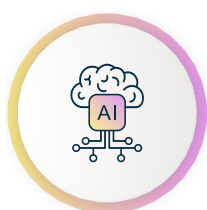
Despite this ambition, fewer organisations have established the structures needed to scale AI effectively. Just **18%** report having a formal and comprehensive AI strategy, and only **16%** describe their business as having a strong AI skillset.

For businesses across Chile, progress toward AI's advanced use cases, and the transformative innovation that comes with them, is not as fast as it could be. With next-generation AI emerging rapidly and compressing innovation timelines, it is more critical than ever that businesses be empowered to move beyond AI's most basic use cases.



Building the foundations for advanced AI adoption

The findings suggest that technology itself is no longer the primary constraint on AI adoption. Many businesses already have access to AI tools, are investing in them, and recognise their strategic importance. The next phase of AI adoption will depend on whether organisations can build the capabilities needed to deploy increasingly advanced technologies at scale.



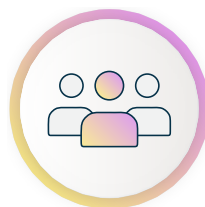
Readiness for the next generation of AI, ensuring organisations can move beyond today's productivity tools and adopt more advanced AI systems as they emerge



Choice and flexibility in the AI landscape, enabling businesses to access the technologies, cloud infrastructure, and providers best suited to their needs while maintaining resilience and security



The ability to demonstrate business value, giving organisations the confidence and evidence to scale AI investment



Workforce capability, equipping employees with the AI and digital skills needed to deploy, manage, and work alongside AI

These foundations reinforce one another. Organisations that can measure value are better able to justify further investment. Skilled workforces are better positioned to adopt increasingly advanced AI technologies. Trusted technology landscapes provide the flexibility to innovate while maintaining security and resilience. Strengthening these capabilities will become even more important as businesses adopt the next generation of AI and operate within an evolving regulatory landscape, underscoring the need for an enabling policy environment that supports innovation alongside responsible AI adoption.

The sections that follow examine each of these foundations in turn, starting with readiness for next-generation AI.

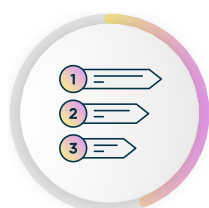


Growing readiness for the next wave of AI

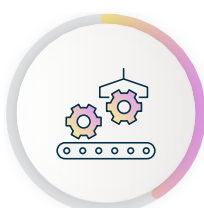
The next generation of AI, particularly agentic AI, physical AI and advanced robotics, creates a significant opportunity for Chile to build on its adoption momentum. Readiness for these technologies is the first of the foundations this research examines, and the findings show both how early Chile is in that journey and how much room there is to grow.

Awareness of agentic AI is increasing, but a significant gap remains between familiarity and use. Fewer than four in ten businesses (**37%**) have heard of agentic AI. Among those that have, only **6%** have fully deployed it and **21%** are experimenting or piloting; a further **34%** have plans to use it or are considering it, while **31%** have no plans to adopt it. Awareness is spreading faster than deployment, leaving most businesses aware of the technology but yet to put it to work.

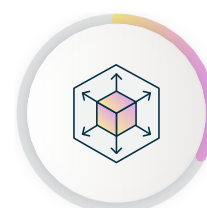
Early adopters are already seeing the benefits. Among businesses using or piloting agentic AI:



44% report faster decision-making and execution



41% report increased operational efficiency or productivity



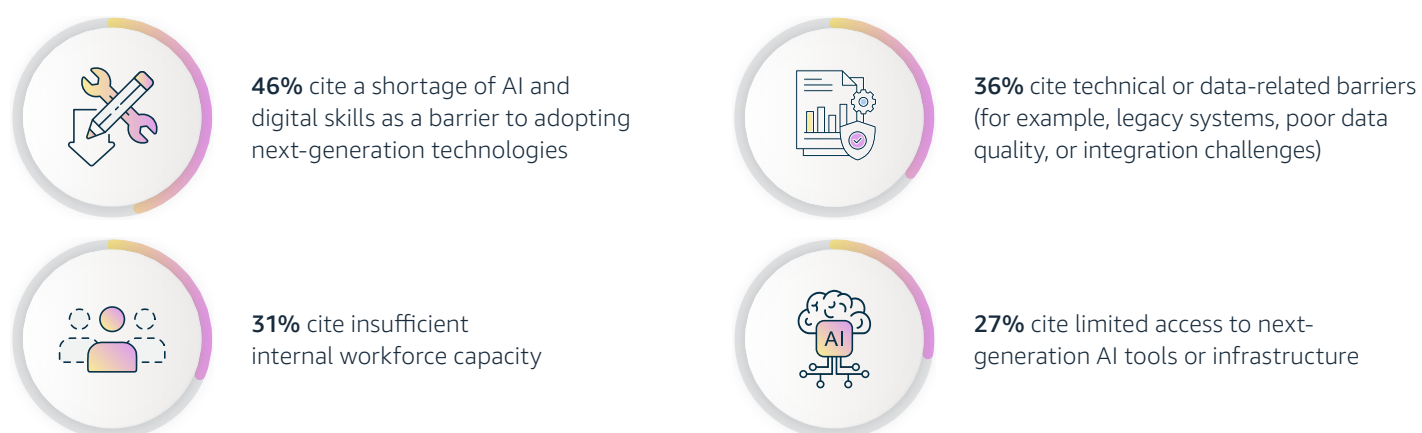
33% report improved scalability of operations

These gains point to why closing the readiness gap matters: the value is real for those who reach deployment.

Next-generation AI is also not hypothetical in Chile. The country's mining sector already operates some of the world's largest autonomous haulage fleets. The readiness question is therefore one of diffusion, whether these capabilities spread from a handful of flagship industries into the wider economy.

The majority of businesses do not feel ready to adopt these emerging technologies, but startups are a bright spot. Only **18%** of businesses say they feel ready to adopt next-generation AI technologies such as agentic AI – contrasted by **39%** of startups. **33%** of all businesses say they are only somewhat ready, and **44%** say they are slightly ready or not at all ready.

Businesses point to persistent constraints that prevent them from moving from readiness to real deployment of next-generation AI:



These constraints aren't fixed. Skills can be developed, data and systems modernised, and access to tools widened. Strengthening these foundations would allow agentic and physical AI to spread beyond flagship sectors, converting today's strong intent into deployment across the wider economy.



Case study: IPS ChileAtiende drives State modernization through Artificial Intelligence to strengthen citizen services



The Instituto de Previsión Social (IPS), through its ChileAtiende service network, which delivers services and benefits to millions of people across the country, launched during 2026 a strategic technology modernization initiative aimed at strengthening operational continuity, the sustainability of its platforms, and the quality of the digital services citizens receive.

The project addressed the transformation of a critical institutional application, built on technologies with more than a decade of operation and which concentrated much of its business logic in highly coupled components. This scenario, common across many public institutions in Latin America, creates significant challenges for the evolution of digital services, increasing dependence on obsolete technologies and hindering the incorporation of new capabilities required by citizens.

To accelerate this transformation and preserve the institutional knowledge accumulated over years, IPS worked alongside AWS Professional Services to implement an innovative model based on Agentic Artificial Intelligence. Using Kiro, Amazon Bedrock AgentCore, and AWS Transform, it automated much of the work of analysis, documentation, development, validation, and modernization of software components, making it possible to more efficiently tackle complex, highly critical systems.

The initiative made it possible to evolve a monolithic architecture toward a modern solution based on microservices, APIs, and decoupled components, significantly improving the platform's maintainability, scalability, and ability to integrate with the IPS digital ecosystem. Likewise, the automated generation of technical documentation, requirements traceability, and validation mechanisms helped strengthen technology governance and reduce the risks associated with knowledge management.

Beyond the technological transformation, this project represents a concrete step forward in building institutional capabilities to meet the challenges of modernizing the State. The incorporation of artificial intelligence was not limited to code generation; it strengthened the entire software engineering cycle, facilitating knowledge transfer, reducing implementation times, and enhancing internal teams' ability to maintain and evolve strategic systems.

The experience developed by IPS demonstrates that Artificial Intelligence can become an effective tool to accelerate the digital transformation of the public sector, allowing institutions to focus greater effort on what truly creates value for people: the timely, secure, and efficient delivery of benefits and services. This model serves as a reference for other State organizations facing similar processes of technological renewal and the pursuit of greater operational efficiency.

For IPS, this initiative is part of a broader strategy of technological modernization and institutional strengthening, aimed at building digital platforms that are more resilient, interoperable, and prepared to respond to the present and future needs of citizens, thereby contributing to the institutional purpose of bringing the State closer to people through simple, reliable, and high-quality services.



Businesses value choice and flexibility in the AI and cloud landscape

As Chile builds its next phase of AI-driven growth, access to a competitive and flexible technology landscape is emerging as a key enabler. Businesses want the freedom to choose the tools, infrastructure, and providers best suited to their needs, and that flexibility is closely tied to their ability to innovate and scale.

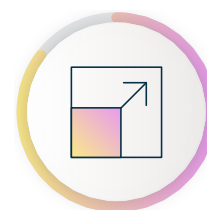
Access to global technology providers matters most, particularly as businesses look to grow beyond the country, a defining condition for a market of Chile's size, where international scale is the growth path.



84% of businesses say access to global technology companies is important to their business's AI adoption and use



81% say it is important to their business's innovation



86% say it is important for Chilean businesses that aim to scale quickly and offer products or services internationally

When selecting technologies, businesses prioritize speed, scalability, resilience, security, and the ability to make the right choices based on customer needs. To meet these priorities, many operate across mixed ecosystems rather than relying on domestic providers alone: **57%** currently use a mix of providers from different regions. This openness is an asset, giving Chilean businesses access to the best capabilities wherever they originate.

The ability to choose and switch between providers reinforces this. **71%** of adopters say they have adequate choice to select and switch between different providers of AI technologies, and **68%** say this choice is extremely or very important to supporting their adoption of AI.

For businesses that use AI tools from providers based outside Chile, the top reasons are:



Perceived technological leadership or advanced capabilities (**44%**)



Better scalability, performance or integration options (**39%**)



Strong data security and governance (**36%**)

Maintaining this openness will be central to Chile's continued AI progress. A landscape where businesses can draw on world-class technology and switch freely between providers gives them the flexibility to innovate, scale internationally, and compete, positioning Chile to make the most of the next wave of AI.

Businesses define sovereignty through trust, security, and choice

Digital sovereignty is a broad and evolving concept, and there is no single agreed definition across businesses and policymakers. For Chilean businesses, though, a clear emphasis emerges: sovereignty is understood less in terms of where technology providers are based, and more in terms of who controls the data and under what rules. It is about owning and governing data securely, not where that data physically sits.

Reflecting this, when asked which option best captures what digital sovereignty means to them, businesses most commonly point to legal control, data protection, and governance rather than provider nationality:



Chile has already demonstrated this model of sovereignty in practice. [LatamGPT](#), the region's first open large-scale language model, launched in February 2026, was built by a Chile-led regional coalition on global cloud infrastructure, treating sovereignty as a matter of capability and trust rather than localism.

This emphasis carries through to where businesses want public investment to go. Rather than prioritizing local infrastructure for its own sake, they favour the foundations that support successful AI adoption. When ranking their top five priorities for public investment in tech and innovation, only **19%** include government-supported or Chile-based cloud infrastructure, and only **26%** include AI-specific infrastructure such as compute capacity, data, and HPC for AI development. By comparison, **58%** include skills development, reskilling, and workforce training; **47%** business adoption of digital and AI technologies; **44%** cybersecurity and digital resilience; and **38%** research and innovation funding.

For Chilean businesses, then, sovereignty rests on trust, security, and choice, a combination they see as critical to supporting long-term AI competitiveness.





Businesses are investing in AI, but many still struggle to prove value

As AI investment grows, Chilean businesses face a critical question: how do they know whether AI is actually delivering value? The research suggests that while organisations are becoming more sophisticated in their approach to measurement, many still lack confidence in their ability to evaluate success.

Many businesses report positive returns:



56% say returns have surpassed their initial AI investment



92% report productivity gains from AI



86% say the adoption of AI has led to an increase in their business's revenue

But confidence in measurement remains much lower than confidence in adoption.

Nearly half of organisations (**46%**) are not confident in their ability to measure AI ROI – saying ROI is difficult to measure in practice, that they do not have a reliable way to measure ROI, or that they do not attempt to measure it at all. Just **14%** are very confident, with clear, reliable ways to measure ROI, and only **17%** have a framework for measuring the success of AI projects that is well-defined and consistently applied.

Even among organisations that measure AI performance, the focus is often on activity rather than outcomes. Based on what they include when measuring success, **41%** track only activity and usage measures – such as adoption and usage by employees, or integration into existing workflows or systems – while **23%** include business outcome measures such as revenue growth or new revenue streams and customer outcomes; **30%** track a mix of both.

Measurement is not always being used to drive decisions. While **28%** of organisations say metrics directly determine whether AI projects are scaled or discontinued, **39%** say metrics inform decisions but are not consistently applied, and **24%** say metrics are tracked but rarely influence decisions or are not used in decision-making.



Many businesses still lack the digital skills they need, while AI redefines the future of work

Skills are becoming the defining constraint on Chile's AI ambitions

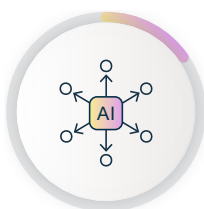
As AI adoption continues to expand across Chile, the challenge facing many organisations is no longer whether to adopt AI, but whether they have the workforce capability needed to scale it successfully. Skills are quickly becoming the sharpest constraint on that ambition, with **48%** of businesses citing a shortage of AI and digital skills as a barrier to adopting or expanding their use of AI technologies.

These challenges extend well beyond specialist AI roles. Businesses report that it takes an average of five months to find an employee with the right digital skills for a position, a delay that slows adoption across the wider organisation. At the same time, they increasingly recognise that talent will be central to future competitiveness: **88%** say access to skilled AI talent and training programmes is important for supporting growth in their business and their industry.

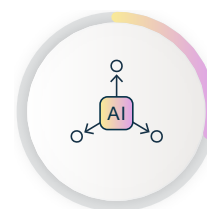
The gap between ambition and readiness is particularly striking:



71% of organisations expect AI skills to be very important in their industry over the next five years



Only **16%** currently describe their business as having a strong AI skillset



29% say they are just beginning to develop AI skills

Many businesses therefore see the importance of AI talent clearly but have yet to build the capability to match.

This points to a growing consensus that talent may become the defining factor determining which organisations successfully capture value from AI in the years ahead. Reflecting this, **58%** rank skills development, reskilling, and workforce training among their top five priorities for public investment in tech and innovation, more than any other area.

Case study: Universidad San Sebastián redefines higher education in Chile with AI powered by AWS



Universidad San Sebastián (USS), one of Chile's leading higher education institutions, decided not to wait for the debate over artificial intelligence in the classroom to be settled: it chose to bring AI in with purpose and on its own terms. In April 2026, it inaugurated its Artificial Intelligence Center and established a strategic partnership with Amazon Web Services (AWS) to develop projects on world-class cloud platforms, with a clear goal: to use technology to strengthen students' learning and critical thinking, without replacing the act of thinking itself.

The center's first major initiative took shape as Tutor Seba IA, a virtual tutor integrated into Blackboard and available 24 hours a day. Unlike a general-purpose chatbot, it was designed with a pedagogical, Socratic approach: it does not provide direct answers, but rather guides the process of discovery based on the official bibliography and course materials for each subject. The pilot began in nearly 219 sections of large-enrollment courses and expanded to nine subjects in areas such as Education, Veterinary Medicine, and Basic Sciences, with a view to an institution-wide rollout during 2027.

The partnership with AWS also opened new opportunities for students: USS was selected to implement Kiro for Students, joining institutions such as NYU, the University of Toronto, and Arizona State University in the first global wave of adoption of this technology. This is complemented by an internal competitive fund that finances AI innovation projects across six areas.

USS's commitment extends beyond its classrooms: in September 2026, it joined as a strategic partner in the launch of AWS Entrena Chile, an initiative that aims to train 300,000 people free of charge in artificial intelligence and cloud computing by 2028. In this way, the university projects to the country the same logic it applies internally: closing the digital skills gap that today limits students, entrepreneurs, and workers, establishing itself as a benchmark for how Chilean higher education can lead the responsible adoption of AI.

AI is becoming more accessible across the economy

While skills remain a major constraint, businesses view AI itself as becoming more accessible. The emergence of cloud-based AI services, user-friendly tools, and intuitive interfaces is lowering barriers to adoption: **66%** of organisations agree that AI technologies are accessible to businesses in their industry – suggesting that for many firms the challenge is no longer access to technology itself, but how to use it effectively.

When asked what is driving this growing accessibility, businesses most commonly point to the availability of affordable AI solutions, the presence of user-friendly AI platforms, advances in cloud computing and AI infrastructure, and widespread availability of training and support.

This shift is changing expectations across the workforce: **54%** of organisations say employees are expected to be familiar with basic AI tools, and **43%** say employees are expected to be comfortable using basic AI tools.

Businesses also view AI as a force for democratising economic opportunity:

- **63%** agree that AI is enabling smaller businesses in Chile to scale faster
- **58%** agree that AI is enabling smaller businesses in Chile to compete more effectively on the international stage
- **67%** agree that Chile's startup ecosystem will play a key role in driving Chile's competitiveness in AI
- **38%** say AI has helped their business expand operations or services to international markets

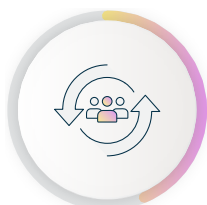
As AI becomes more accessible, a wider range of organisations can reach advanced capabilities that were once reserved for large enterprises, widening participation in Chile's AI economy and helping smaller firms compete at greater scale.

AI is reshaping jobs, skills, and opportunity

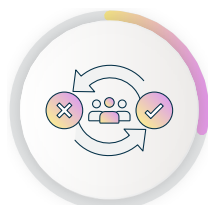
The long-term impact of AI on Chile's workforce is likely to be defined less by job replacement and more by job transformation. **61%** agree that AI tools could increase access to economic opportunities for people living outside Chile's largest cities, and **59%** agree that AI will increase economic opportunities in underserved regions of Chile over the next five years.

More broadly, **66%** agree that AI tools are making advanced digital technologies accessible to a wider range of businesses and workers, while **62%** believe AI-powered digital tools could make it easier for self-employed workers and small businesses to participate in the formal economy.

Rather than anticipating widespread job displacement, organisations are more likely to expect workforce evolution:



44% say AI will mostly create new roles or significantly reshape existing ones over the next 3 to 5 years



29% believe AI will both create and displace roles, with a net neutral impact

The jobs that emerge are expected to look different from those of today. Businesses most commonly anticipate the creation of new hybrid roles combining domain expertise with AI or data skills, greater emphasis on supervising, guiding, or validating AI systems, and existing roles becoming more strategic, analytical, or decision-focused.

These changing expectations are already influencing hiring plans:



Businesses estimate that **46%** of new jobs over the next three years will require AI literacy and **22%** will require AI expertise



Employers also indicate they are willing to pay a premium for these capabilities, with salary offers increasing by an average of **14%** for candidates with strong AI skills

AI is reshaping the skills that workers need, changing the nature of many jobs, and creating new pathways to economic participation. For Chile, ensuring workers can access the skills needed to participate in this transition may be one of the most important determinants of long-term AI competitiveness.





Recommendations: Unlocking Chile's AI future

Chile has built strong momentum in AI adoption. The challenge is now ensuring that more businesses can move beyond experimentation and capture the full economic benefits of advanced AI technologies. The following recommendations set out practical actions to accelerate Chile's next phase of AI-driven growth in a way that benefits citizens and businesses alike.

1. Accelerate AI readiness by helping businesses move beyond experimentation

Focus public and private sector support on helping businesses move from experimentation to transformation through AI readiness programmes, cloud and data modernisation, technical enablement, and support for next-generation AI adoption. Particular focus should be placed on SMEs, which are significantly less likely than startups to report readiness for advanced AI deployment – **14%** of SME adopters have reached the most advanced uses of AI, against **46%** of startups, and **18%** of all businesses feel fully or very ready for next-generation AI, against **39%** of startups.

2. Make the public sector Chile's flagship AI adopter

The public sector has an opportunity to act as both a catalyst and demonstration case for AI adoption across the economy: **52%** of businesses say they are much or somewhat more likely to increase their AI adoption when public sector organisations adopt the technology.

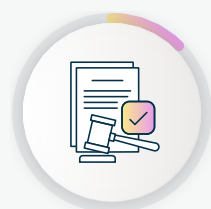
Chile already has strong digital foundations – it retained the top spot in the Latin American Artificial Intelligence Index (ILIA) 2025. The next step is to build on these strengths through an AI-first approach across government, embedding AI into public services, government operations, and citizen-facing services.

By positioning the public sector as Chile's leading AI adopter, the government can demonstrate responsible AI deployment, create demand for digital skills, build confidence in AI technologies, and accelerate adoption across the wider economy.

3. Foster an innovation-friendly environment for AI growth

Businesses want AI regulation that provides clarity and builds trust, while avoiding unnecessary barriers to adoption and innovation. **74%** say clarity on regulation is very or critically important to their adoption and innovation with AI.

Yet awareness of the current legislative process remains mixed:



Only **12%** of businesses are very familiar with the debate and proposed legislation to implement an AI Bill and know how it would operate



19% are familiar with the debate but could not explain how it would operate



38% have not heard of either the debate or the proposed legislation



Only **24%** agree they have enough confidence in the stability of AI regulation to make plans for their business

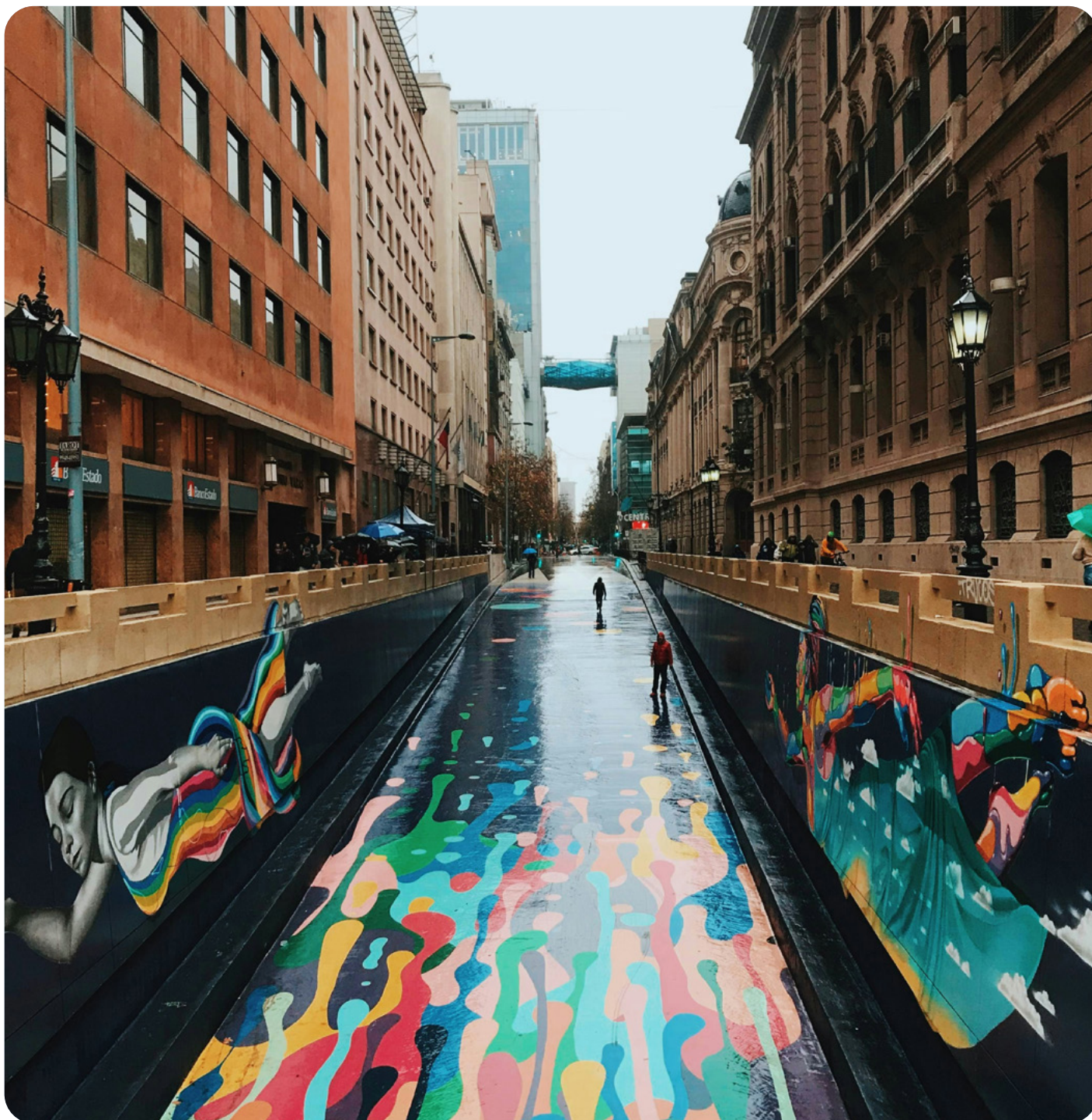
This matters because compliance is already a significant part of technology investment. Businesses currently allocate an average of \$21 out of every \$100 of their tech spend to compliance with national and international regulation (up from \$19 last year) – and the rise businesses predicted last year has materialized: in 2025, **73%** expected compliance costs to increase; this year, **69%** report that their compliance-related tech spend has significantly or somewhat increased over the past three years. Looking ahead, **66%** expect the proportion of tech spend associated with regulatory compliance to increase further in the next three years.

As the AI Bill moves through the Senate, Chile has a window to lock in a clear, stable, and innovation-friendly regulatory environment that gives businesses confidence to invest, while maintaining safeguards around privacy, security, and responsible AI use. Regulation should prioritize enabling AI adoption and innovation, minimise unnecessary compliance burdens, and ensure businesses of all sizes can access and benefit from emerging AI technologies.

4. Build Chile's AI skills pipeline for long-term competitiveness

To drive growth and innovation through AI, Chile can scale national AI skills and workforce training programmes, with a focus on practical AI literacy, developer talent, and upskilling for SMEs. Chile should prioritize partnerships between government, industry, education providers, and technology companies to ensure workers and businesses can access the skills needed to adopt, scale, and benefit from AI.





Building the foundations for Chile's AI future

Chile has reached a defining moment in its AI journey. Nearly half of businesses are using AI, investment continues to grow, and organisations are increasingly embedding the technology into their operations to drive productivity, innovation and growth. As the next generation of AI begins to emerge, sustained success will depend on the capabilities businesses build to adopt, scale and realize value from AI over the long term. Readiness for advanced AI, access to trusted and flexible cloud and AI ecosystems, workforce capability, effective leadership, and the ability to measure business value will help organisations deploy AI with confidence and accelerate innovation. By continuing to strengthen these foundations while fostering an environment that supports skills, responsible AI adoption and innovation, Chile is well placed to build on today's momentum and unlock the next generation of AI-driven growth, boosting productivity, competitiveness and long-term economic prosperity.

Appendix

Methodology

The fieldwork for this study was undertaken by Strand Partners' research team for Amazon Web Services. This research has followed the guidance set forth by the UK Market Research Society and ESOMAR. For the purposes of this study, business leaders are defined as founders, CEOs, or members of the C-suite in organisations.

'Citizens' are nationally representative members of the public based on the latest available census.

For inquiries regarding our methodology, please direct your questions to: polling@strandpartners.com.

In Chile:

- We conducted a survey targeting 1,000 nationally representative members of the public, ensuring representation based on age, gender, and region.
- Additionally, we surveyed 1,000 business leaders, representative by their business size, sector, and region.

Sampling:

Our sampling process used a mix of online panels that are recognised for their validity and reliability. These panels are carefully curated to ensure diverse representation across various demographics. For the business leaders, the panels are selected with a consideration for organisational size, sector, and position within the company. Our objective with the sampling strategy is to achieve an optimal mix that mirrors the actual distribution of our target populations in the respective markets.

Weighting Techniques:

Post-data collection, we applied iterative proportional weight to correct any discrepancies or over-representations in the sample.

Survey:

This study was designed with the objective of delving deep into the digital landscape:

- **Usage Patterns:** This survey gauges the evolving patterns of digital technology usage. We are particularly interested in examining the adoption and implementation levels of technologies, focusing on cloud computing and artificial intelligence.
- **Perceptions and Attitudes:** The survey seeks to unearth the prevailing perceptions and attitudes towards digital technologies, understanding the perceived benefits, challenges, and potential ramifications of both present and emerging tech solutions.
- **Barriers and Opportunities:** The survey scrutinises the predicted challenges and potential avenues that both businesses and individuals anticipate on their digital trajectory. This involves pinpointing challenges, from skill deficits to regulatory complications, and recognising opportunities for growth, innovation, and market development.
- **'Size of the Prize':** The survey shed light on the economic repercussions and growth prospects linked with digital transformation. By elucidating the 'size of the prize', we aspire to stress the importance of digital transformation and foster further investments and technology adoption.

References

1. Based on a recent estimation of the total number of registered businesses in Chile: infobelpro.com/companies/chile