



UNLOCKING MEXICO'S AI POTENTIAL 2026

The next wave of AI is here

Mexico's AI adoption continues to accelerate. More businesses than ever before are investing in AI, embedding it into day-to-day operations, and reporting measurable improvements in productivity, innovation, and growth. The Unlocking Mexico's AI Potential 2026 research tracks this continued momentum, showing that AI is becoming an increasingly important driver of business competitiveness across Mexico.

[Unlocking Mexico's AI Potential 2025](#) identified an important trend: although AI adoption was growing rapidly, only a small proportion of organisations were using AI in its most advanced and transformative ways. The 2026 research moves beyond measuring adoption alone to examine why this gap persists. Rather than asking simply who has adopted AI, this year's study explores whether organisations are building the foundations needed to translate adoption into long-term transformation.

The findings suggest that the next phase of Mexico's AI journey will be determined less by access to AI technologies than by organisational readiness. As next-generation AI technologies such as agentic AI emerge, businesses increasingly recognise that success depends on having the right capabilities in place: clear AI strategies, skilled workforces, trusted digital infrastructure, effective governance, and the ability to measure and demonstrate return on investment. While adoption is becoming widespread, many organisations have yet to establish these foundations, limiting their ability to deploy AI at scale or realise its full economic value.

The research therefore identifies a new readiness gap. A small group of organisations are progressing towards next-generation AI, while many businesses remain focused on experimentation, isolated use cases, and incremental productivity gains. This gap is no longer simply about technology adoption; it reflects differences in organisational capability, investment confidence, and preparedness for the next wave of AI innovation.

Alongside this deeper analysis of organisational readiness, the report continues to track Mexico's AI adoption over time and examines the conditions needed to sustain future growth. It explores how businesses view trusted AI ecosystems, provider choice and digital sovereignty, the growing importance of ROI measurement, the role of the public sector¹ in accelerating adoption, workforce readiness, and the sectoral opportunities emerging across the Mexican economy. These findings move the conversation beyond adoption towards a broader question: how can Mexico build the foundations needed to unlock the next generation of AI-driven growth?

Key findings

- AI adoption in Mexico is accelerating, with **48%** of businesses now having adopted AI, up from **38%** last year. This means that the number of AI-adopting businesses has now reached over 2.5 million – with around 550,000 new AI adopters in the last year – approximately one new AI adopter every minute²
- Businesses are preparing for the next generation of AI, but readiness remains limited. Only **22%** of organisations feel fully or very ready to adopt next-generation AI technologies such as agentic AI, despite strong interest and clear evidence of business benefits among early adopters
- Many businesses are not yet harnessing agentic AI: fewer than four in ten businesses (**37%**) say they have heard of agentic AI, and of those familiar with the technology, only **6%** report having fully deployed the technologies
- Although most AI adopters report productivity gains (**88%**) and positive returns (**86%**), almost half (**46%**) say they lack a reliable way to measure AI's return on investment (ROI)
- Skills remain the single greatest enabler of Mexico's AI ambitions. More businesses prioritise investment in skills, reskilling, and workforce training (**57%**) than any other national technology priority, recognising workforce capability as fundamental to unlocking AI's full economic potential
- Public sector leadership could accelerate AI adoption across the wider economy: while government AI adoption currently lags behind the private sector, **53%** of businesses say greater AI adoption in the public sector would make them more likely to increase their own use of AI, while **58%** of citizens say it would make them view AI more positively





Tracking adoption: The annual benchmarks

Mexico's AI journey continues to gather pace. Businesses are adopting AI at record rates, increasing investment, and embedding the technology more deeply into their operations. Compared with last year, AI is no longer viewed as an emerging technology by many organisations, but increasingly as a strategic capability that underpins productivity, innovation, and long-term competitiveness.

AI adoption has increased from **38%** to **48%** over the past year, representing a year-on-year growth rate of **26%**. Adoption has increased across businesses of all sizes, with startups continuing to lead the way (**52%**), followed by large businesses (**49%**) and SMEs (**47%**). Momentum is also being driven by leading sectors, particularly information and communication (**68%**), financial services (**61%**), and professional services (**56%**).

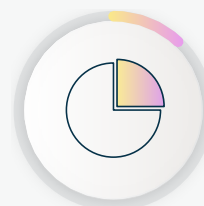
This growing adoption is being matched by growing investment.



Nearly two-thirds of organisations (**63%**) say their AI investment has increased over the past year



Almost half (**44%**) now operate with a dedicated AI budget



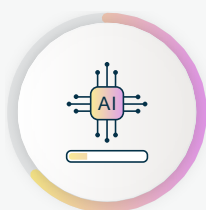
Among organisations with dedicated budgets, AI already accounts for **12%** of total IT spend, with businesses expecting this to almost double to **21%** within the next three years

Businesses are also increasingly recognising AI as central to future competitiveness. Nearly two-thirds (**62%**) describe AI adoption as a high or top organisational priority, while **67%** say AI now plays a critical or important role in their overall business strategy. Alongside AI, cloud adoption continues to strengthen, rising from **63%** to **71%**, providing many organisations with the digital infrastructure needed to support increasingly sophisticated AI applications.

Businesses are realising tangible value from these investments. Among AI adopters, **88%** report productivity improvements, while **84%** expect AI to contribute to business growth over the coming year.

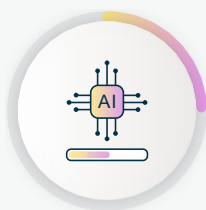
The ongoing digital divide

The 2025 report uncovered an emerging trend: looking deeper into how businesses are implementing AI, from initial adoption to advanced use for transformation, most organisations remain at the earlier stages of adoption. Although a larger share of AI adopters are harnessing advanced AI, the 2026 data shows that this trend persists:



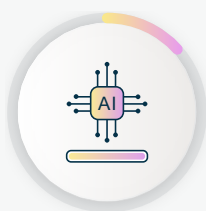
Basic AI adoption:

63% of businesses remain focused primarily on more basic uses of AI and on incremental gains (e.g. driving efficiencies and streamlining processes), rather than innovation (e.g. developing new products or disrupting industries). These businesses are using publicly available chatbots for routine tasks or purchasing ready-made AI solutions. This is down from **72%** last year



Intermediate AI adoption:

24% have advanced to the intermediate stage of AI adoption. These companies are integrating AI across multiple business functions, resulting in efficiency improvements and more innovative customer experiences



Advanced AI adoption:

Only **13%** of businesses have reached the most transformative stage of AI integration, using advanced AI systems, combining multiple models, creating custom AI systems, or deploying agentic or autonomous AI – compared to **7%** last year. Startups lead the way with **32%** at this stage, contrasted by **11%** of SMEs and **9%** of large enterprises

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 **18%** of AI adopters have launched a new AI-driven product or service. At the same time, appetite for further adoption is strong, **78%** expect their use of AI to increase over the next 12 months, and **70%** of businesses say they believe AI will transform their industry in 5 years – recognising the value the technology holds.

Although AI use is becoming widespread, fewer organisations have established the structures needed to scale it effectively. Just **24%** report having a formal and comprehensive AI strategy, and only **23%** believe their workforce has strong digital skills.

For businesses across Mexico, 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.



The foundations for AI readiness

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.

Across the research, five foundations consistently emerge as shaping long-term AI competitiveness:



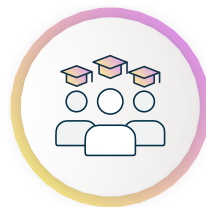
Readiness for the next generation of AI, ensuring organisations can move beyond today's productivity tools and adopt more advanced AI systems as they emerge



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



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



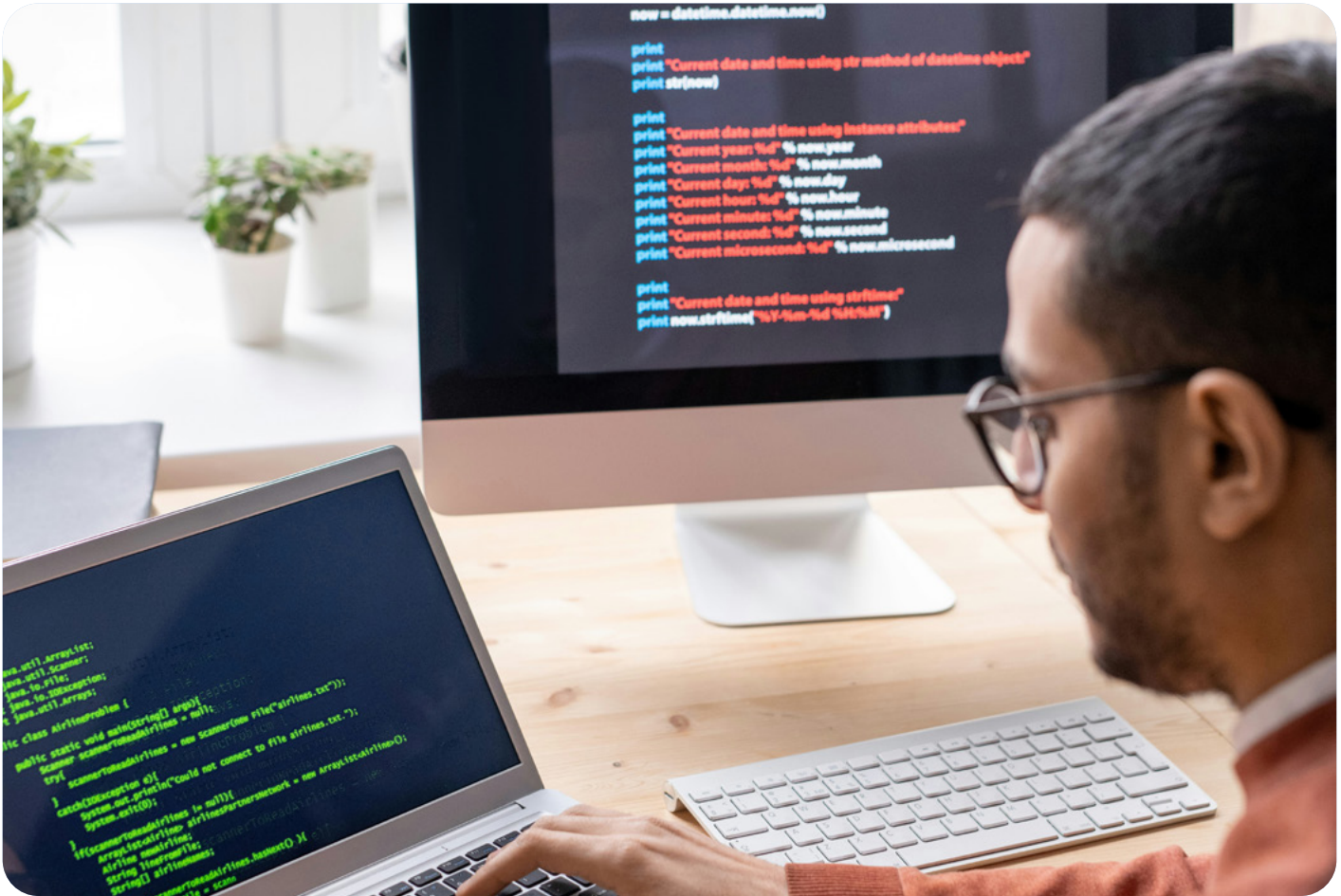
Workforce capability, equipping employees with the AI and digital skills needed to deploy, manage, and work alongside AI



Leadership and organisational readiness, including clear strategies, governance, and the internal capability required to move from isolated pilots to organisation-wide transformation

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. These capabilities play key roles in determining how successfully organisations can move beyond experimentation and unlock AI's full economic potential.

The chapters that follow examine each of these foundations in turn, exploring where businesses are making progress, where capability gaps remain, and the actions that could help more organisations capture the next wave of AI-driven growth.



Businesses are preparing for the next generation of AI – but many do not yet feel ready

The emergence of next-generation AI technologies marks the beginning of a new phase in AI adoption. Technologies such as agentic AI have the potential to automate increasingly complex tasks, coordinate workflows, and support higher-value decision-making. For many organisations, however, the opportunity is arriving faster than their ability to adopt it.

Awareness of agentic AI is increasing, but the gap between familiarity and deployment remains significant. Fewer than four in ten businesses (**37%**) say they have heard of agentic AI. Of those familiar with the technology, only **6%** report having fully deployed agentic AI, while **28%** are experimenting or piloting it. When the technology is explained, a further **42%** say they have plans to use agentic AI or are considering it, while **24%** say they have no plans to adopt it.

Those that have adopted agentic AI are realising benefits across their business: **55%** report faster decision-making and execution, **51%** report increased operational efficiency or productivity, and **38%** report improved scalability of operations.

The majority of businesses do not feel ready to adopt these emerging technologies, but startups and leading sectors are a bright spot:



Only **22%** of businesses say they feel fully or very ready to adopt next-generation AI technologies such as agentic AI – contrasted with **39%** of startups

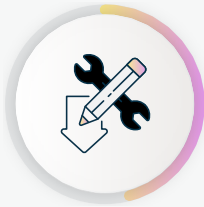


41% of all businesses say they are only somewhat ready

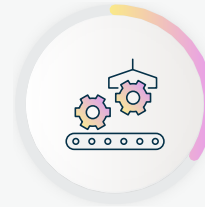


37% say they are slightly ready or not ready at all

Businesses also identify a number of practical constraints that continue to slow progress from interest to deployment. The most commonly cited barriers include:



46% report shortages of AI and digital skills



36% cite technical or data-related challenges



33% point to insufficient internal workforce capacity



29% report limited access to next-generation AI tools or infrastructure

This reinforces a broader theme emerging throughout the research – building the foundations for AI transformation extends beyond adopting today’s technologies. It also requires organisations to prepare for the technologies that are already beginning to reshape how businesses operate. Those that strengthen their skills, technical capabilities, and organisational readiness today will be better positioned to capture the benefits of the next generation of AI as adoption accelerates.

Case study: Nauphilus



[Nauphilus](#) is a Mexican behavioural AI startup transforming financial inclusion and mass recruitment across Latin America. Powered entirely on AWS, its platform leverages advanced AI services to process real-time digital interviews – reducing validation times by **99.7%** and enabling up to 10x growth in credit placement for unbanked populations. By converting behavioural data into precise, scalable business decisions, Nauphilus mitigates critical risks such as fraud and early attrition. The company serves leading enterprises in telecommunications, finance, retail, and private universities.

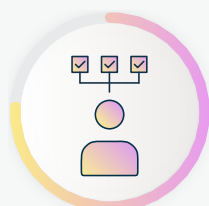


Choice and flexibility underpin AI transformation

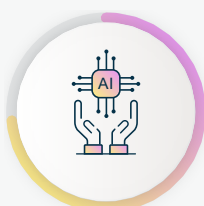
As businesses move towards more advanced AI adoption, the technologies they choose – and the flexibility to choose between them – become increasingly important. Organisations consistently emphasise the importance of being able to access the technologies, capabilities, and expertise that best meet their needs as AI becomes more sophisticated and business-critical.

Access to global technology providers is widely viewed as an important part of this ecosystem. More than four in five businesses (**84%**) say such access is important for their AI adoption, while **81%** believe it supports innovation and **76%** say it is important for scaling quickly.

When businesses are selecting their technologies, their priorities are speed, scalability, resilience, security, and the ability to make the right technology choices based on customer needs. As a result, rather than relying exclusively on domestic providers, many organisations operate across mixed ecosystems, selecting technology partners based on capability and performance.



68% of businesses say they have adequate choice to select and switch between different providers of AI technologies



74% say having this ability to choose and switch is extremely or very important to supporting their adoption of AI



62% report that they currently use a mix of providers from different regions, rather than working primarily with providers from their home country

When organisations choose technology providers based outside of Mexico, their decisions are driven primarily by capability rather than cost. Businesses most commonly cite competitive pricing or favourable commercial terms (**47%**), a wider range of features or product offerings (**44%**), and better scalability, performance and integration options (**38%**).

Businesses define sovereignty through trust, security, and choice

Questions around AI and digital sovereignty are becoming increasingly important as countries seek to strengthen their digital capabilities and reduce strategic vulnerabilities. The research suggests Mexican businesses recognise these concerns. Many identify resilience against geopolitical disruption, stronger security, and greater control over critical digital infrastructure as legitimate priorities for the years ahead.

At the same time, businesses do not see sovereignty and openness as competing objectives. Instead, they tend to view resilience as being strengthened through trusted technology landscapes and the ability to choose the technologies that best meet their needs.

When asked what digital sovereignty means to them, businesses most commonly identify:

- Ensuring Mexican laws apply regardless of provider nationality **(54%)**
- Strong data protection, privacy, and cybersecurity standards **(52%)**
- Control over how and where Mexican data is stored and processed **(46%)**
- Clear rules on who can access data and under what conditions **(43%)**
- Resilience against geopolitical, economic, or supply-chain disruptions **(36%)**

Notably, these priorities focus on how technology is governed, secured, and managed rather than where providers are headquartered. Businesses appear to associate sovereignty with confidence that data is protected, legal requirements are upheld, critical services remain resilient, and organisations retain the flexibility to build technology environments that best support their objectives.

This perspective is reflected in businesses' priorities for future investment. Organisations place considerably greater emphasis on strengthening the capabilities that enable AI adoption than on developing exclusively Mexico-based AI or cloud infrastructure.

Among the areas businesses believe should be prioritised nationally are:

- Skills development, reskilling and workforce training **(57%)**
- Supporting business adoption of digital and AI technologies **(54%)**
- Cybersecurity and digital resilience **(51%)**
- Research and innovation funding **(43%)**

By comparison:

- **26%** prioritise investment in Mexico-based AI infrastructure such as data centres and compute capacity
- **22%** prioritise investment in Mexico-based cloud infrastructure

Businesses see trusted providers, resilient digital infrastructure, strong cybersecurity, skilled workforces, and access to advanced technologies as complementary foundations for long-term AI competitiveness. Rather than viewing sovereignty as a choice between domestic and international technologies, organisations favour an approach that combines security, resilience, and regulatory oversight with the flexibility to access the capabilities needed to innovate and compete.





Demonstrating value to scale AI adoption

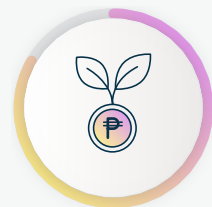
As businesses invest more heavily in AI, the ability to measure its impact becomes an increasingly important organisational capability. Demonstrating clear business value helps organisations prioritise investment, build internal confidence, and identify which AI initiatives should be expanded across the business.



Many businesses report positive returns from AI adoption (**86%**)



Productivity gains from AI deployment (**88%**)



Revenue growth attributable to AI (**84%**)

Yet confidence in how these outcomes are measured remains much weaker than confidence in the outcomes themselves.

Nearly half of organisations (**46%**) say they lack a reliable way to measure AI ROI, making it one of the most significant barriers to scaling investment. Only one in three (**33%**) reports being confident in their ability to accurately measure ROI from AI projects. Just **25%** say they have a clearly defined and consistently applied framework for what constitutes a successful AI deployment.

Even among organisations that measure AI performance, the focus is often on activity rather than outcomes. **45%** say they primarily track activity and usage metrics such as adoption rates, queries processed, or time saved, while only **23%** primarily track business outcome metrics such as revenue impact, cost savings, or customer satisfaction; **32%** track a roughly equal mix of both.

Measurement is not always being used to drive decisions. While **31%** of organisations say AI performance metrics directly determine whether projects are scaled or discontinued, **47%** say metrics inform decisions but are not consistently applied, and **22%** report that metrics rarely or never influence decisions.

Without consistent approaches to measuring AI's impact, organisations may find it more difficult to justify further investment, expand successful projects, or move beyond isolated deployments. Building robust approaches to evaluating AI performance therefore represents another important foundation for organisations seeking to deploy AI at greater scale.



Public sector spotlight: The untapped AI opportunity

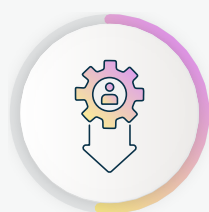
The public sector has a significant opportunity to use AI to modernise services, improve delivery, and demonstrate responsible adoption at scale. The research shows that **41%** of public sector organisations have adopted AI, compared with **48%** of private sector businesses. This places public sector adoption at roughly the level reached by the private sector a year ago (**38%**), suggesting government is approximately one year behind the wider economy in its AI adoption journey.

However, as with the wider economy, adoption does not yet always mean transformation. **70%** of public sector AI adopters are using basic AI tools or ready-made external solutions, while **22%** are at the intermediate stage, integrating AI into products, services or multiple functions. Only **8%** have reached the most advanced stage, using advanced AI systems, custom AI applications, or agentic or autonomous AI. In addition, only **17%** of public sector organisations report having a formal AI strategy. This suggests that beyond skills and infrastructure, institutional governance and strategic planning represent a foundational gap that, if addressed, could accelerate public sector AI maturity significantly.

Public sector organisations using AI are already seeing tangible benefits. **82%** report productivity gains from AI adoption, including **29%** transformative or significant gains. These gains are being seen across businesses, including automation of routine tasks (**57%**), data analysis and reporting (**48%**), customer or citizen service improvements (**44%**), compliance and regulatory adherence (**31%**), and IT and cybersecurity (**27%**).

AI is also contributing to wider organisational impact. **61%** of public sector AI adopters say AI has enhanced automation and efficiency, **52%** say it has improved decision-making and insights, **47%** say it has streamlined processes, and **43%** say it has improved customer or citizen experience.

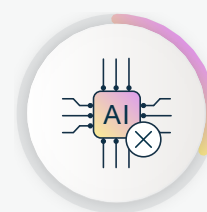
Yet barriers remain, with the top three being:



51% of public sector organisations cite a shortage of AI and digital skills as a barrier to adopting or expanding AI



44% cite lack of skilled personnel



31% difficulty integrating with existing systems

Strengthening public sector AI adoption could also accelerate wider business adoption. **53%** of private sector businesses say adoption of AI by public sector organisations would make them more likely to increase their own AI adoption. Among citizens, **58%** say public sector adoption of AI would make them view the technology more positively.

This suggests public sector adoption can play a dual role: improving government productivity and services directly, while also building public trust and encouraging wider AI adoption across Mexico's economy.

Case study: Picaio



[Picaio](#) closes the fiscal data gaps that every large Mexican enterprise carries. The ERP closes the books; the tax authority works from different records. In between sit missing documents, unmatched payments and numbers that never quite line up, and tax teams spend every month closing that distance by hand in spreadsheets.

Picaio fills those gaps. The Mexico-born company trains proprietary AI models specialised in fiscal data, reconciling invoices, payments, bank statements and accounting records into a monthly IVA determination with the working papers behind it. It works on the data itself and does not issue fiscal opinions, which is why it makes tax teams stronger than ever. Built on AWS and powered by Amazon Bedrock, Picaio's cloud-native architecture is enabling a new generation of enterprise fiscal intelligence.



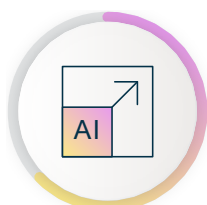


AI is reshaping work, creating new opportunities, and raising demand for new skills

The impact of AI on Mexico's workforce is likely to be defined less by replacing jobs than by changing how work is carried out. As AI becomes embedded across more industries, businesses increasingly expect employees to work alongside AI systems, undertake higher-value tasks, and develop new combinations of technical and domain expertise.

Many organisations also believe AI has the potential to broaden economic participation by making advanced digital capabilities available to more workers and businesses across the country.

Businesses expect AI to create opportunities in several ways:



63% believe AI will expand access to digital jobs beyond traditional technology hubs such as Mexico City



60% believe AI can improve employment and economic participation in underserved regions



65% believe AI-powered tools will make it easier for self-employed workers and small businesses to participate in the formal economy

Businesses also expect AI to make technical work more accessible. Nearly two-thirds (**62%**) believe new AI tools will enable a wider range of workers to undertake activities such as coding, software development, and technical problem-solving. More broadly, **69%** agree that AI is making advanced digital technologies accessible to a wider range of businesses and workers.

These changing capabilities are also reshaping expectations of the labour market. Rather than anticipating widespread job displacement, organisations more commonly expect existing roles to evolve and entirely new roles to emerge.

- **46%** believe AI will primarily create new jobs or significantly reshape existing ones over the next three to five years
- **34%** expect AI to create and displace jobs in roughly equal measure

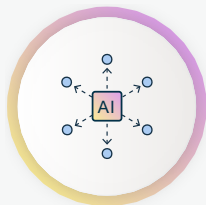
Businesses expect demand to grow for hybrid roles that combine sector expertise with AI capabilities, alongside employees who can supervise, validate, and effectively deploy AI systems. Strategic thinking, judgement, and decision-making are also expected to become increasingly valuable as routine tasks become more automated.

These changing expectations are already influencing recruitment. Businesses estimate that almost half of future hires (**49%**) will require AI literacy, while **19%** will require specialist AI expertise. Employers also report offering an average salary premium of **35%** for candidates with strong AI capabilities.

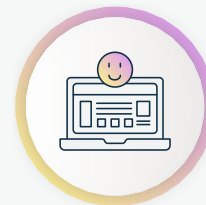
AI is lowering barriers to adoption across the economy

As AI tools become easier to access and use, more organisations believe the technology is becoming available to businesses beyond traditional technology sectors.

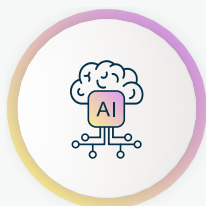
More than two-thirds of organisations (**68%**) agree that AI technologies are now accessible to businesses in their industry. Businesses most commonly attribute this to:



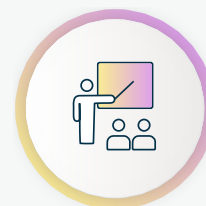
Affordable AI solutions becoming more widely available



User-friendly AI platforms and interfaces



Advances in cloud infrastructure



Greater access to training and technical support

This greater accessibility is also changing baseline expectations across the workforce:

- **66%** say employees are now expected to be familiar with basic AI tools
- **54%** expect employees to use AI as part of their day-to-day work

Businesses also believe these developments are making it easier for smaller firms to compete. Seven in ten (**70%**) say AI is helping smaller businesses scale more quickly, while **65%** believe AI is improving their ability to compete internationally by giving them access to capabilities that were once available only to much larger organisations.

Building the workforce needed for the next generation of AI

Although AI is becoming easier to access, developing the workforce capable of deploying it effectively remains one of the most important foundations for long-term AI competitiveness.

Businesses consistently identify skills shortages as one of the principal barriers to adopting and expanding AI.



49% cite a lack of skilled personnel as a barrier to AI adoption



42% struggle to recruit workers with the necessary digital skills



Only **31%** believe they have sufficient access to the technical and developer talent required to deliver their AI plans

Businesses recognise that these capability gaps are likely to become more significant as AI adoption accelerates. While **72%** expect AI skills to become very important within their industry over the next five years, only **23%** currently describe their organisation as having a strong AI skillset. A further **44%** say they are only beginning to build these capabilities.

The importance businesses place on workforce development is reflected in their wider priorities for Mexico's AI future. More organisations identify investment in skills, reskilling, and workforce training (**57%**) as a national priority than investment in domestic AI or cloud infrastructure.

The findings point to a broader shift taking place across Mexico's economy. AI is creating new forms of work, expanding access to advanced technologies, and lowering barriers to innovation. Realising these opportunities, however, will depend on whether organisations can equip workers with the skills needed to adopt, manage, and build the next generation of AI technologies.





Recommendations: Unlocking Mexico's AI future

1. Accelerate AI readiness by helping businesses move beyond experimentation

While AI adoption has reached **48%**, **63%** of businesses remain focused on basic AI applications and only **13%** have reached the most advanced stage of AI adoption. Public and private sector support should therefore focus 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.

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

With **41%** of public sector organisations having adopted AI, compared with **48%** of private sector businesses, government has an opportunity to accelerate its own AI transformation while encouraging wider adoption across the economy. Only **17%** of public sector organisations currently report having a formal AI strategy, suggesting there is significant scope to strengthen organisational readiness. Building on Mexico's strong digital foundations, government can embed AI across public services, internal operations, and citizen-facing services. This matters beyond government itself: **53%** of businesses say they would be more likely to adopt AI if the public sector did so, while **58%** of citizens say greater public sector adoption would make them view AI more positively.

3. Foster an innovation-friendly landscape for AI growth

Businesses are seeking a policy environment that builds trust and confidence in AI adoption while preserving the conditions for innovation, investment, and growth. **71%** say clarity on AI regulation is very or critically important to AI adoption, yet awareness of current legislative proposals remains mixed: **14%** say they are very familiar with ongoing proposals in Mexico's Congress to regulate AI, **45%** have heard of the proposals but could not explain them in detail, while **41%** have not heard of them at all.

Businesses also want regulation to support responsible AI use without slowing progress. **56%** say the most important aims of AI regulation should include protecting privacy and data security, **51%** cite ensuring AI is used ethically and responsibly, and **44%** cite encouraging innovation while maintaining safeguards. However, organisations are also concerned about unintended consequences: **47%** say regulation should avoid creating excessive barriers that slow down AI innovation, **42%** say it should avoid imposing unnecessary costs on businesses and startups, and **38%** say it should avoid restricting access to AI technologies for smaller companies.

This matters because compliance is already a significant part of technology investment. Businesses currently allocate an average of **18%** of their technology spend to compliance with national and international regulations, and **58%** say this spend has increased over the past three years. Looking ahead, **69%** expect the proportion of technology spend associated with regulatory compliance to increase further over the next three years.

Mexico can create a clear, stable, and innovation-friendly landscape that gives businesses confidence to invest, while maintaining safeguards around privacy, security, and responsible AI use. Regulation should prioritise 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 Mexico's AI skills pipeline for long-term competitiveness

The research consistently identifies workforce capability as one of the greatest constraints on AI adoption. Only **23%** of organisations believe they currently have a strong AI skillset, while **49%** cite a lack of skilled personnel as a barrier to adopting or expanding AI. At the same time, **72%** expect AI skills to become very important over the next five years.

Mexico can strengthen its long-term competitiveness by scaling national AI skills and workforce training programmes, with a particular focus on practical AI literacy, developer talent, and upskilling for SMEs. Partnerships between government, industry, education providers, and technology companies will be critical to ensuring workers and businesses can adopt, scale, and benefit from AI.



Building the foundations for Mexico's AI future

Mexico has reached an important moment in its AI journey. Adoption is accelerating, investment is growing, and businesses increasingly recognise AI as a strategic capability that will shape future competitiveness. Yet the next phase of AI will be defined by how businesses use AI – not simply by how many organisations adopt the technology. Readiness for next-generation AI, the ability to demonstrate business value, choice and flexibility in the AI landscape, workforce capability, and strong organisational leadership will increasingly distinguish those organisations that move beyond experimentation from those that transform. By investing in these foundations, and by continuing to foster an environment that supports innovation, skills, and responsible AI adoption, Mexico has the opportunity to unlock the full economic and societal benefits of AI, strengthening productivity, competitiveness, and inclusive growth in the years ahead.



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 Mexico:

- 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.

In addition to our sample of private sector businesses, we also surveyed 250 public sector organisations.

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. In this research, "public sector" refers broadly to publicly funded organisations, including government ministries and agencies, state and local government, public healthcare and education institutions, public safety organisations, state-owned enterprises, public utilities, and independent public bodies and regulators.
2. Calculated based on recent estimates for the total number of businesses in Mexico, which in 2023, [El Instituto Nacional de Estadística y Geografía estimated to be around 5.5 million](#).