

AI IN THE SICA REGION 2026

How adoption, skills and competitiveness
changed in one year

From AI awareness to AI competitiveness

Evolution of the 2025 presentation | Cenpromype | April 2026

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Centro Regional de Promoción de la MIPYME



The 2026 shift: from pilots to three speeds

The most visible leap was institutional learning, not only technology.

2025

Pilots, interest and first strategies

2026

Three speeds across the region

What changed in one year

Structured leaders
Costa Rica + Dominican Republic
Strategy, stronger index positions
and clearer adoption signals.

Accelerators
Panama + El Salvador
More workplace use or regulatory
momentum, but still with gaps.

Fragmented ecosystems
Guatemala, Honduras, Belize +
Nicaragua. More training and public
conversation; less scale and
governance.

The strategic test

Will SICA use AI to build productivity, inclusion and stronger MSMEs — or remain a consumer of tools designed elsewhere?

Why talk about AI in SICA now?

AI is now a competitiveness, productivity and public-policy variable.

88%

of surveyed organizations
use AI regularly in at least
one function

+425%

growth in GenAI course
enrollments in Latin America
in 2025

US\$11.7T

projected tourism
contribution worldwide in
2025



The conversation changed

It is no longer only about whether SICA
joins the AI wave. It is about speed, value
capture and productive transformation.



The gap has changed

The divide is no longer “AI vs. no AI”; it is
productivity users vs. tool consumers.

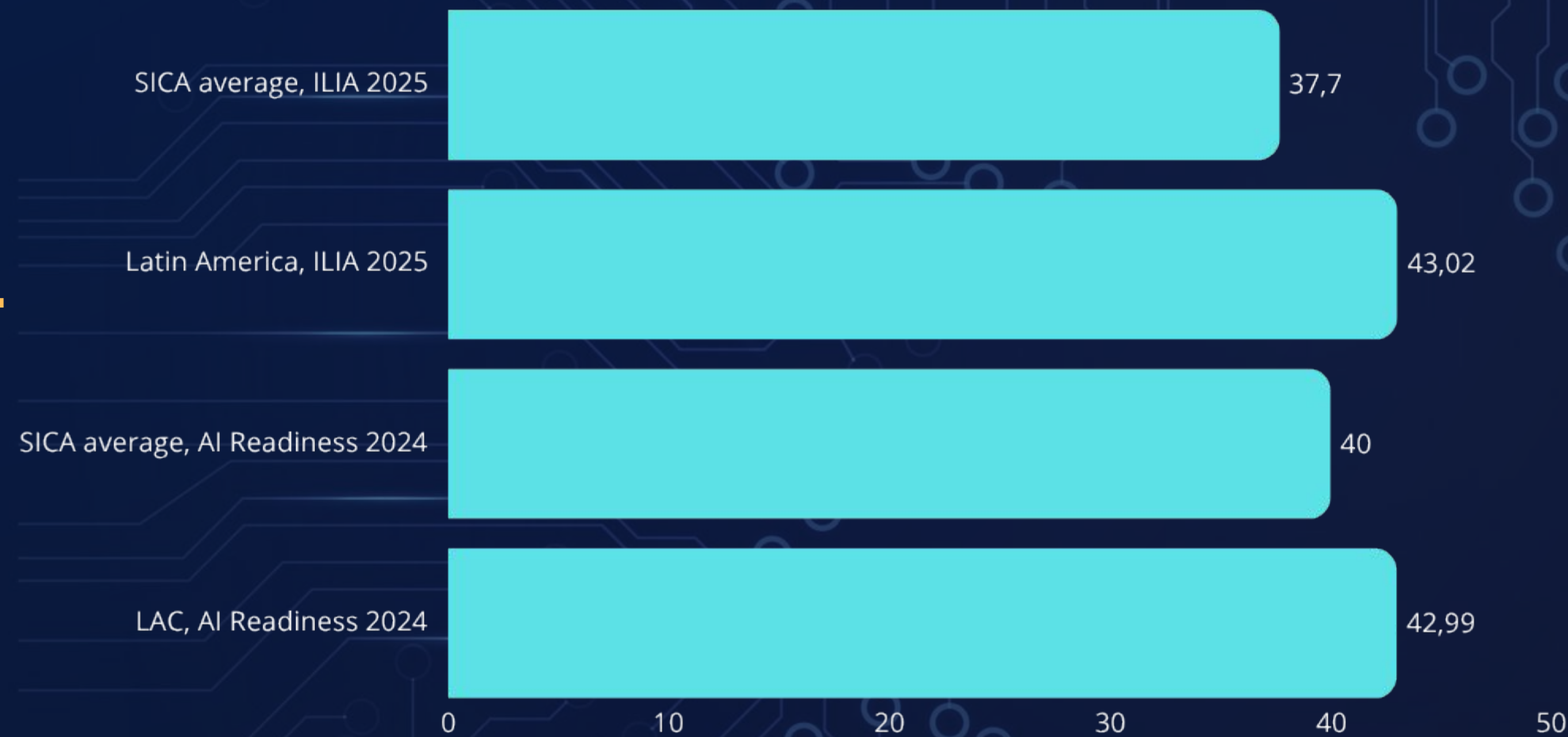
Opening question

Will SICA capture value with AI, or mainly consume technology created outside the region?

Regional overview: SICA versus Latin America

SICA has advanced, but still remains below the regional average.

Index comparison



Structured

Costa Rica + Dominican Republic

Strategy and stronger adoption signals

Acceleration

Panama + El Salvador

Workplace use or regulatory momentum

Fragmentation

Guatemala, Honduras, Belize + Nicaragua

Training and public conversation, less scale

Why a few points matter

- Connectivity and cloud dependence
- Data governance and interoperability
- Advanced talent and computing capacity
- State capacity to scale use cases

Country status: Belize and Guatemala

Movement is real, but both countries still depend on basic enablers.



37.59

Belize AI Readiness 2024

Belize

2025 Global Digital Services policy links AI to the evolution of BPO toward higher-value services. Visible potential: smart tourism, customer service and digital government

Belize bottleneck

Small scale, uneven connectivity and no specific national AI roadmap identified.



36.41

Guatemala AI Readiness 2024

Guatemala

AILA 2025 places the country in phase 2 of 5: limited and dispersed progress, with talent as the main bottleneck.

2026 opportunity

Move from diagnosis to implementation: strategy, talent, governance, infrastructure and use cases.

Both are taking concrete steps, but not yet a systemic leap.

Country status: El Salvador and Honduras

One regulatory leap; one regional training bet.

El Salvador

The Law to Promote Artificial Intelligence and Technologies (Feb. 2025) changes the country trajectory. It includes research, application, education and training.



34.09

Readiness 2024



32.04

ILIA 2025

Still missing

More evidence of deep business adoption and stronger institutional execution capacity.

Honduras

LATAM 4.0 with the Dominican Republic targets an initial cohort of 1,000 young people trained in AI, 500 in each country.



29.83

Readiness 2024



27.39

ILIA 2025

Key reading

The visible advance comes mainly from cooperation and training; the institutional and technology base is still low.

Country status: Nicaragua, Costa Rica and Panama

Three speeds: training, institutionalization and workplace use.

Nicaragua: trains

New AI specializations and 150 certificates in a 2025 cohort. 2,407 people trained across eight seasons. Real progress, but on a low structural base.



28.53

Nicaragua readiness

Costa Rica: institutionalizes

National AI Strategy 2024-2027, 5G and a National AI Center of Excellence. SICA leader in adoption and talent.



56.85

Costa Rica readiness



53.83

ILIA

Panama: uses

AI use among workers rose from 32% in 2024 to 40% in 2025 and 44% in 2026. The challenge is deeper transformation.



44.39

Panama readiness



38.95

ILIA

Key reading

Nicaragua is widening the training base. Costa Rica is building a country framework. Panama is already diffusing use, but must still convert usage into strategy.

Country status: Dominican Republic

Not an emerging case anymore

The National AI Strategy was already operating, and in 2025 OGTIC reported progress in six strategic priority initiatives.



52.69

AI Readiness 2024



45.71

ILIA 2025

Strategic ambition

Regional AI hub, international agreements and priority sectors such as tourism.

How much did AI training increase in one year?

The honest answer: no single comparable SICA-wide annual rate exists.

+425%

GenAI course enrollments
in Latin America in 2025

Regional proxy

The regional trend is clear: **AI training exploded.**
The challenge is to convert literacy into applied capability.

SICA advanced

Costa Rica + Dominican Republic
Strong early AI-skills integration
signals

SICA intermediate

Honduras, RD + Panama
LATAM 4.0 and executive
competitiveness programs.

SICA incipient

Nicaragua, Guatemala + El Salvador
New offer, diagnostics and legal
training mandates.

Core tension

AI literacy is growing faster than market absorption and faster than institutional maturity

What is the real adoption of AI in SICA?

2.9 / 5

Average maturity of responsible AI use in LAC

31%

SMEs already invested in AI

72%

SMEs planned to invest

Key phrase

AI has entered desks, training programs and regulatory frameworks; it has not yet entered the whole productive structure with the same depth.

Costa Rica

Only SICA country among the regional adoption leaders in ILIA 2025.

Panama

Best everyday-use indicator:
40% of workers used AI in 2025
and 44% in 2026.

Guatemala

AILA phase 2 of 5: opportunistic use, not systemic adoption.

Challenges and barriers to adoption

The main barrier is structural and cumulative, not narrowly technological.

Infrastructure and computing

External cloud dependence and limited capacity for data-intensive solutions.

Advanced talent

Literacy grows faster than specialization and implementation capability.

Governance and regulation

Without clear rules, AI remains reactive rather than strategic.

Data and interoperability

Without clean and available data, AI stays at assistant and simple-automation level.

Financing and vision

Many firms see AI as a cost and lack use cases with clear return.

Territorial inequality

Urban concentration risks widening gaps between firms and territories.

The response cannot be a single initiative. It needs a chain of actions: connectivity, talent, data, governance, financing and use-case design.

Sector zoom: tourism and artificial intelligence

Tourism may be the sector where SICA has the most to gain from AI.



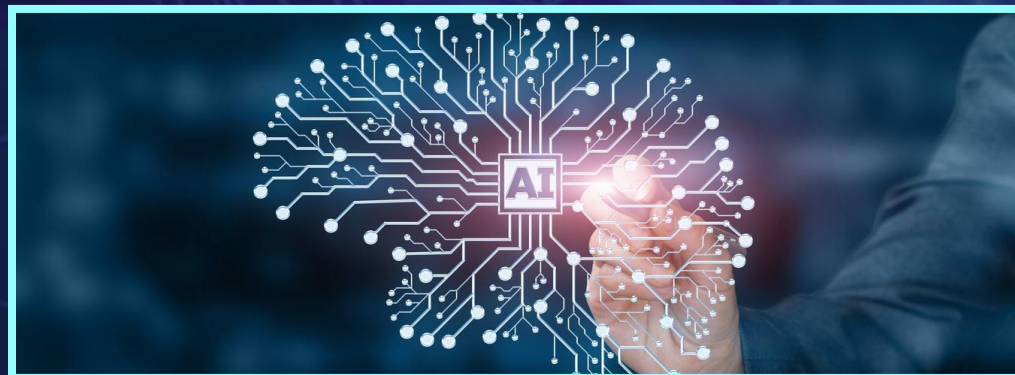
US\$11.7T
expected global tourism
contribution in 2025



371M
global jobs associated with
the sector

Why AI fits tourism

Service, data, languages, reputation, pricing, logistics and visitor experience are all AI-native terrain.



Regional signal

Panama has recovered tourism scale, and the Dominican Republic is already translating the AI agenda into tourism-specific training

Smart destination
marketing

Multilingual
assistants for
MSMEs

Reviews and
reputation
analytics

Demand and
occupancy
forecasting

Energy, inventory
and staffing
efficiency

Personalized
visitor
experiences

Belize: sectors with highest AI potential

Belize will compete on strategic precision, not scale.

Strategic reading

Belize's opportunity is to use AI to move up the value chain in sectors where it already has economic base, export capacity or urgent productivity needs

Tourism and leisure

multilingual assistants, revenue management, reputation analytics

Aquaculture and mariculture

water monitoring, health risks, feed optimization

Global Digital Services / BPO

customer copilots, automated QA, voice and text analytics

Manufacturing and logistics

demand forecast, routes, inventory, maintenance

Agro and food processing

yield forecasting, quality control, traceability

Digital government

service chatbots, case priority, document support

Common principle: the highest returns appear where value chains, visitors, exports or services already exist and can gain productivity quickly.

Belize deep dive: tourism and AI training

Tourism is the most immediate use case; training is moving, but still foundational.

Tourism: where AI can move the needle

551,698

overnight arrivals in
2025 (+0.8%)

967,214

cruise passengers in
2025 (+8.1%)

● Where value can grow

Multilingual sales, itinerary recommendation, dynamic pricing, demand prediction, review analytics and marketing.

● Main barriers

Fragmented MSME offer, limited CRM/data, uneven connectivity, scarce local talent and external-platform dependence.

Training: real progress, still base-building

1.Digital base

Digital Agenda 2022-2025: infrastructure, connectivity and training

2.Program

E-Governance Academy Belize / Vincula LAC 2025 includes courses such as Generative AI for Everyone.

3.Talent ladder

Mass literacy, intermediate technical skills and a small specialist

Strategic key
core for implementation and governance.

Belize does not need to create the tourism sector; it needs to lift value per visitor and MSME productivity.

Recommendations for SICA and Cenpromype

Start with the most useful, adoptable and scalable AI for MSMEs.

01

Applied regional agenda

Focus on sales, tourism, exports, service, inventory and administrative productivity.

04

Guided adoption

Mentoring, implementation and follow-up — not courses alone.

02

Literacy ≠ specialization

Mass responsible use; build selective sector-specific specialization.

05

Simple responsible use

Privacy, human verification, transparency and bias management for MSMEs

03

AI for tourism and commerce

Fastest sector to show visible gains in revenue, conversion and experience.

06

Measure better

Annual observatory on training, real use and business results

The relevant question for MSMEs is not when they will train a foundation model. It is how AI helps them sell better, serve better, decide better and produce better today.

AI is already reshaping regional competitiveness.

SICA's challenge is not to adopt more. It is to adopt better.

More talent. More productivity. More inclusion.

Fewer scattered pilots; more useful transformation for MSMEs.