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INVIRTIENDO LA HISTORIA

20 años: de promesa a potencia



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Mark Esposito

Professor of Tech Policy, Northeastern University

Faculty Associate, Harvard University

Chief Economist, micro1

Argentina: From Rule-Taker to Rule-Shaper

A strategic brief for the cognitive economy

AI infrastructure, energy systems and geopolitics now form one strategic contest. Argentina can enter it late as a customer—or early enough to shape the rules.

Mark Esposito, PhD
Professor of Technology Policy, Northeastern University
Faculty Associate, Harvard University
Chief Economist, micro1

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The question is no longer theoretical.

Will Argentina set rules—or inherit them?

Standards for data, algorithms and compute are being written before the technology has fully diffused. The country has assets that matter. It does not have the luxury of arriving after the architecture is fixed.

The strategic choice is not between openness and closure. It is between passive absorption and deliberate participation.



Frame based on United Nations, Governing AI for Humanity (2024), and World Bank, Global Trends in AI Governance (2024).

The internet is breaking into regulatory blocs.

Different models are competing to define the standards for data, algorithms and compute.

MARKET-LED

Scale, innovation speed and commercial ecosystems.

RIGHTS-LED

Privacy, accountability and risk control.



STATE-LED

National control over infrastructure and information.

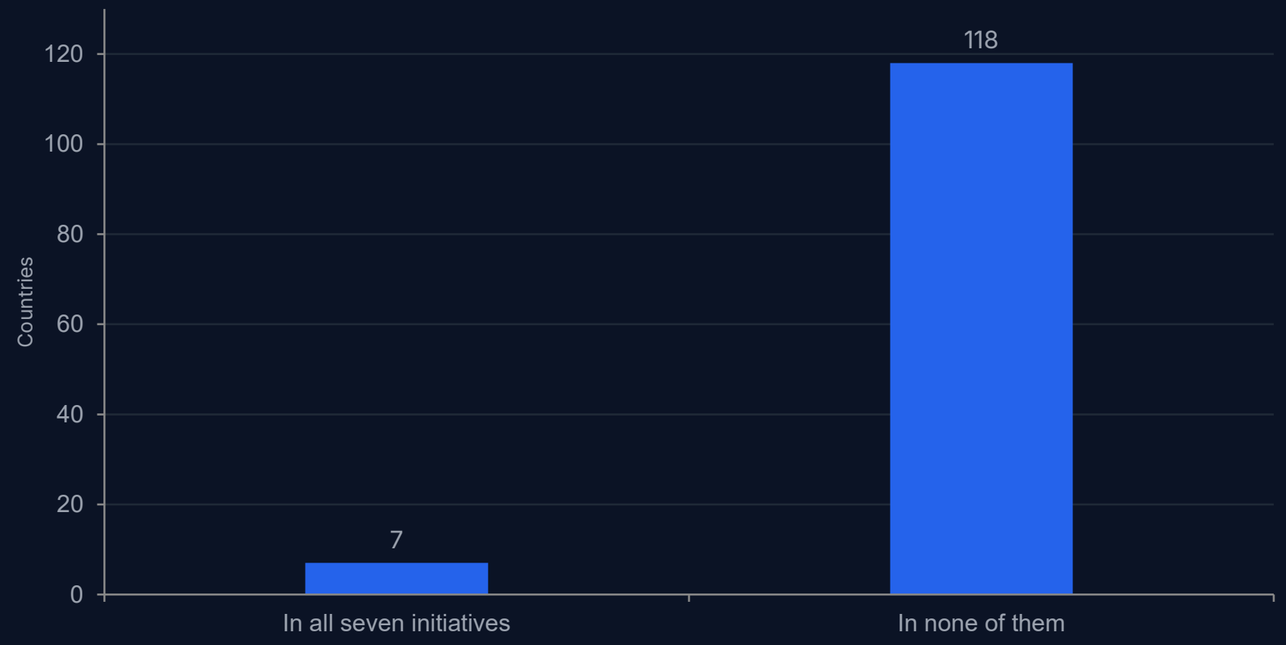
DEVELOPMENT-LED

Access, inclusion and productive transformation.

Sources: WTO-OECD, Economic Implications of Data Regulation (2025); UN, Governing AI for Humanity (2024); World Bank, Global Trends in AI Governance (2024).

The rulemaking gap is a representation gap.

Across seven prominent AI-governance initiatives, participation is highly uneven—and much of the Global South is absent.



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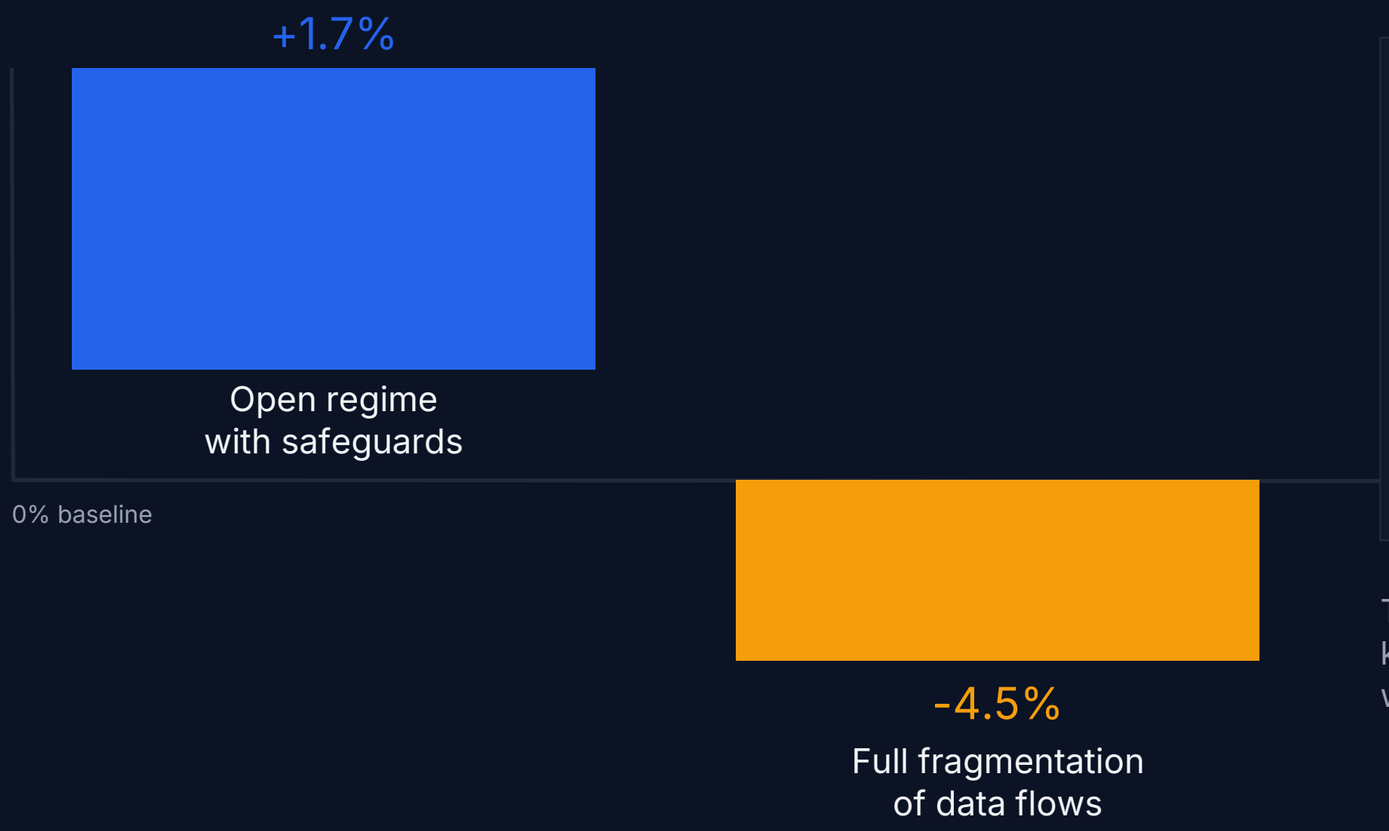
countries are parties to none of the seven initiatives

This is not only a governance problem. It is a rulemaking asymmetry: many countries are expected to comply with standards they had little role in shaping.

Source: United Nations, Governing AI for Humanity (2024).

Fragmentation carries a measurable economic cost.

The chart compares two modelled regimes for global GDP: openness with safeguards versus full restriction of cross-border data flows.



WHY THIS MATTERS

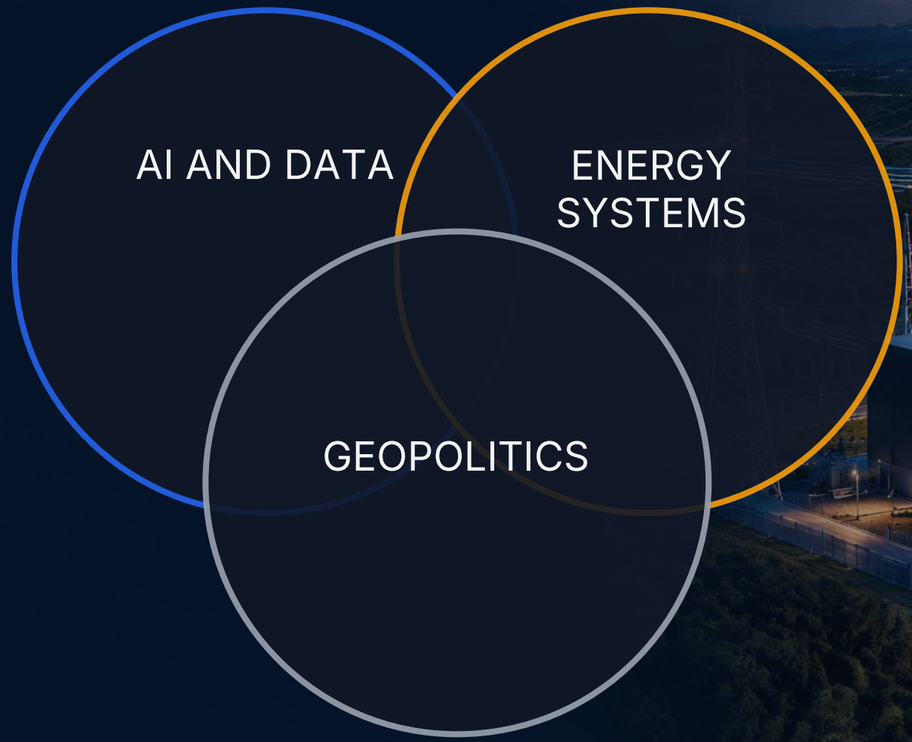
Interoperability is not a compliance nicety. It is economic policy: regimes that preserve cross-border trust capture more value than regimes that sever data exchange.

These are modelled scenarios, not forecasts. The key message is directional: strategic openness with safeguards outperforms fragmentation.

Source: WTO-OECD, Economic Implications of Data Regulation: Balancing Openness and Trust (2025).

AI, energy and geopolitics are now one system.

Compute demand strains grids and water systems. Chips and data corridors now carry strategic weight. Regulation is forcing hard choices on digital sovereignty.

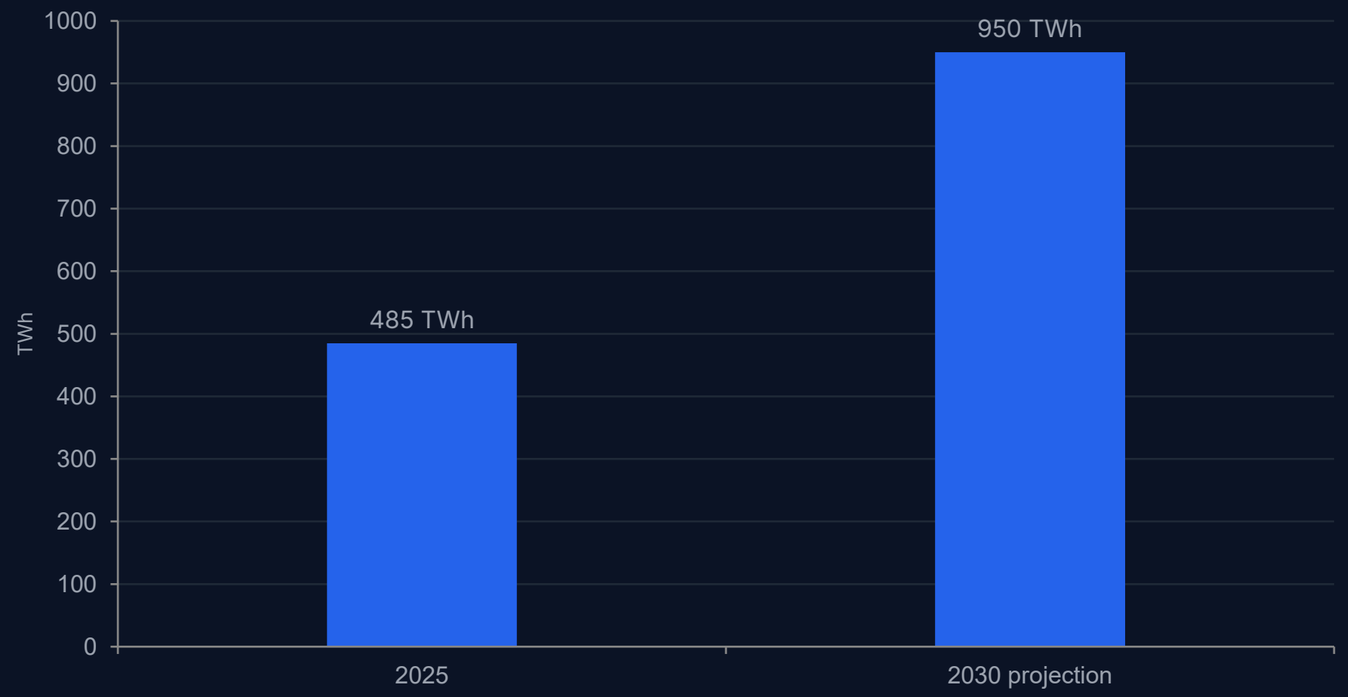


For Argentina, this convergence is both a vulnerability and an opening: dependence is possible, but so is leverage—if the country aligns digital rules, energy planning and international positioning.

Sources: IEA, Energy and AI (2025); UNCTAD, Digital Economy Report 2024; OECD on AI and data-governance fragmentation.

Compute demand is becoming an energy-planning issue.

Global data-centre electricity consumption is projected to roughly double from 2025 to 2030, with AI the main driver.



950 TWh

about 3% of global electricity demand in 2030

The energy implication is direct: AI growth cannot be planned as a software-only policy. It has to be planned as an electricity, water, transmission and land-use policy.

Source: IEA, Key Questions on Energy and AI (2026).

Grid capacity—not land—is the binding constraint.

The most successful compute strategies start from grid reality, not from announcements.

~20%

of planned data-centre projects could face delays

5–10 yrs

wait for a grid connection in many jurisdictions

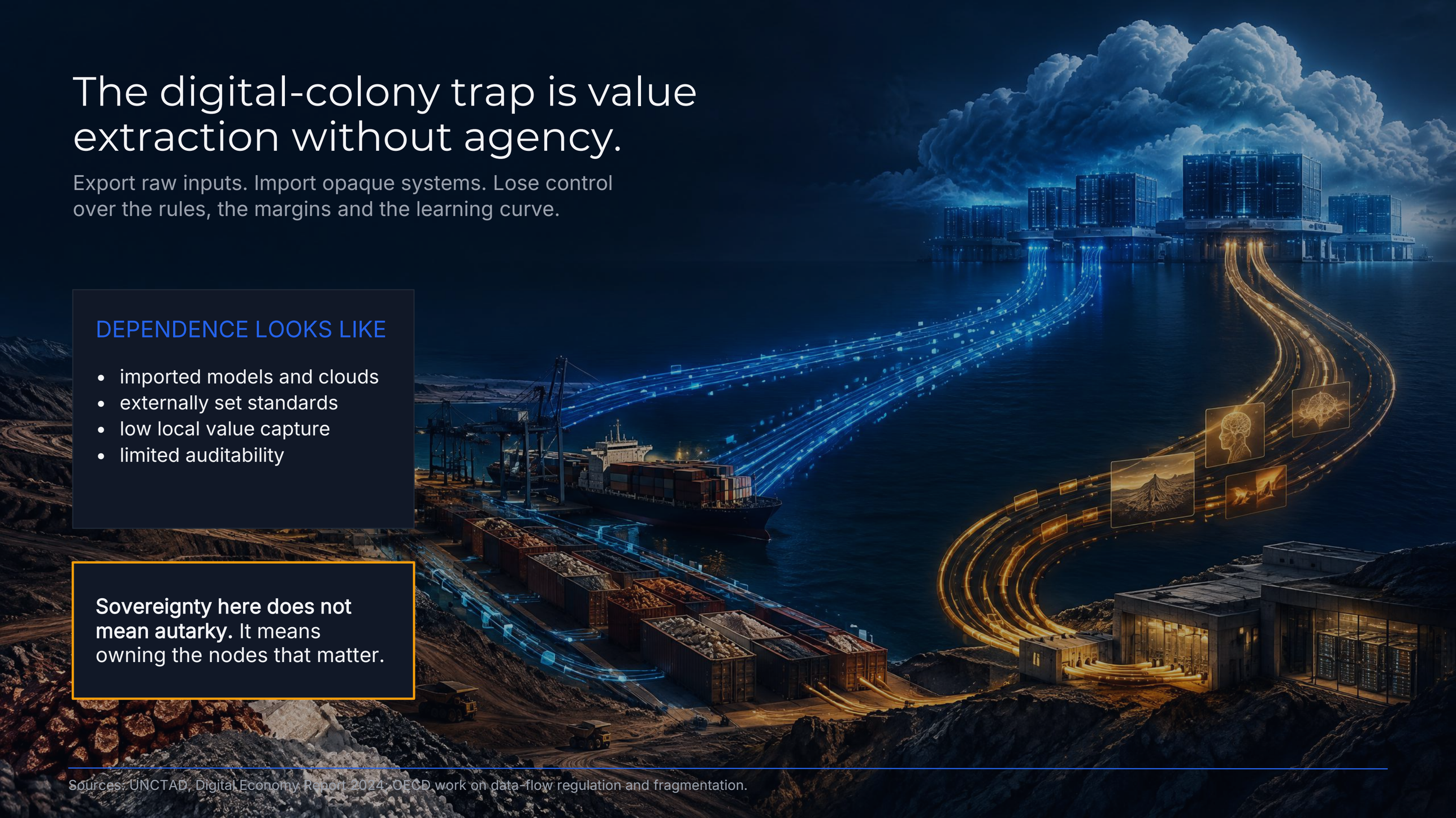
Investment rule: locate compute where the grid, water and backup strategy are credible.



Sources: IEA, Energy and AI (2025); IEA, Key Questions on Energy and AI (2026).

The digital-colony trap is value extraction without agency.

Export raw inputs. Import opaque systems. Lose control over the rules, the margins and the learning curve.



DEPENDENCE LOOKS LIKE

- imported models and clouds
- externally set standards
- low local value capture
- limited auditability

Sovereignty here does not mean autarky. It means owning the nodes that matter.

Sources: UNCTAD, Digital Economy Report 2024; OECD work on data-flow regulation and fragmentation.

Argentina has an opening—not a blank slate.

Its leverage comes from combining capabilities that rarely sit together in one country.



01 · TALENT

Technical and creative capability across public institutions, academia and the private sector.

02 · RESOURCES

Energy potential, mineral relevance and an agro-industrial base that can absorb AI productively.

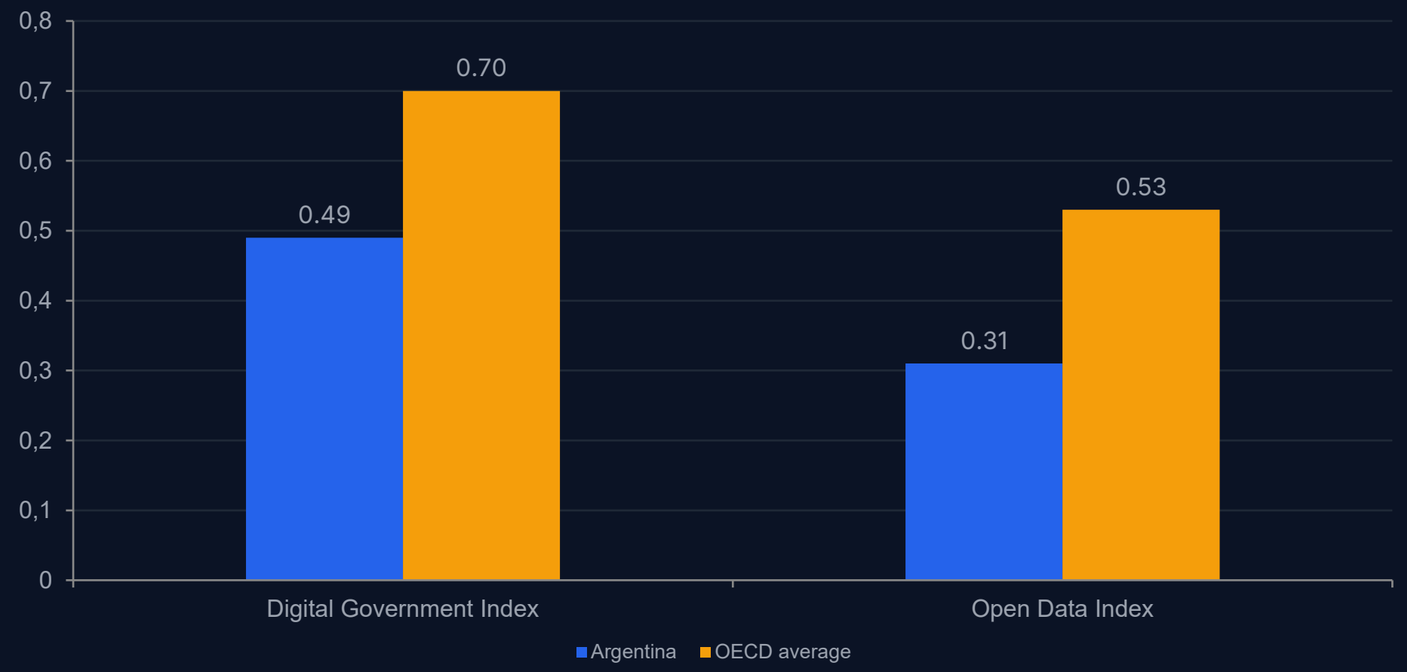
03 · DEMOCRATIC LEGITIMACY

A governance advantage if Argentina can turn trust into usable standards.

Framing based on OECD, World Bank, IEA and AAIP evidence used throughout this deck.

The baseline is credible but incomplete.

Argentina has digital-government foundations, but remains below OECD averages in both digital government and open data.



Strengths

Digital by design, openness and platform foundations are real assets.

Constraint

User-centred design, proactive services and especially data re-use are still weak.

Source: OECD, Digital Government Outlook 2026: Argentina (DGI 2025 = 0.49 vs OECD 0.70; OURdata 2025 = 0.31 vs OECD 0.53).

Infrastructure is already being built.

Argentina’s next move should build on what is already funded and operational, not restart from zero.

US$200m

World Bank loan for connectivity, resilience and digital uptake, active through January 2028.

Focus: broadband in remote areas, decentralized data centres and digital skills.

4

decentralized data centres planned under the project.

Linked to ARSAT’s Tier 3 data centre in Benavídez and built to energy-efficiency and climate-resilience standards.

22m+

adults use the Mi Argentina app, plus 4m minors (2025).

Digital-profile sign-ups on argentina.gob.ar passed the World Bank project’s 12m target.

Sources: World Bank, project P178609 page (2025) and appraisal document (2022); World Bank restructuring paper, project P174946 (2025).

Energy and minerals provide leverage—but not automatically.

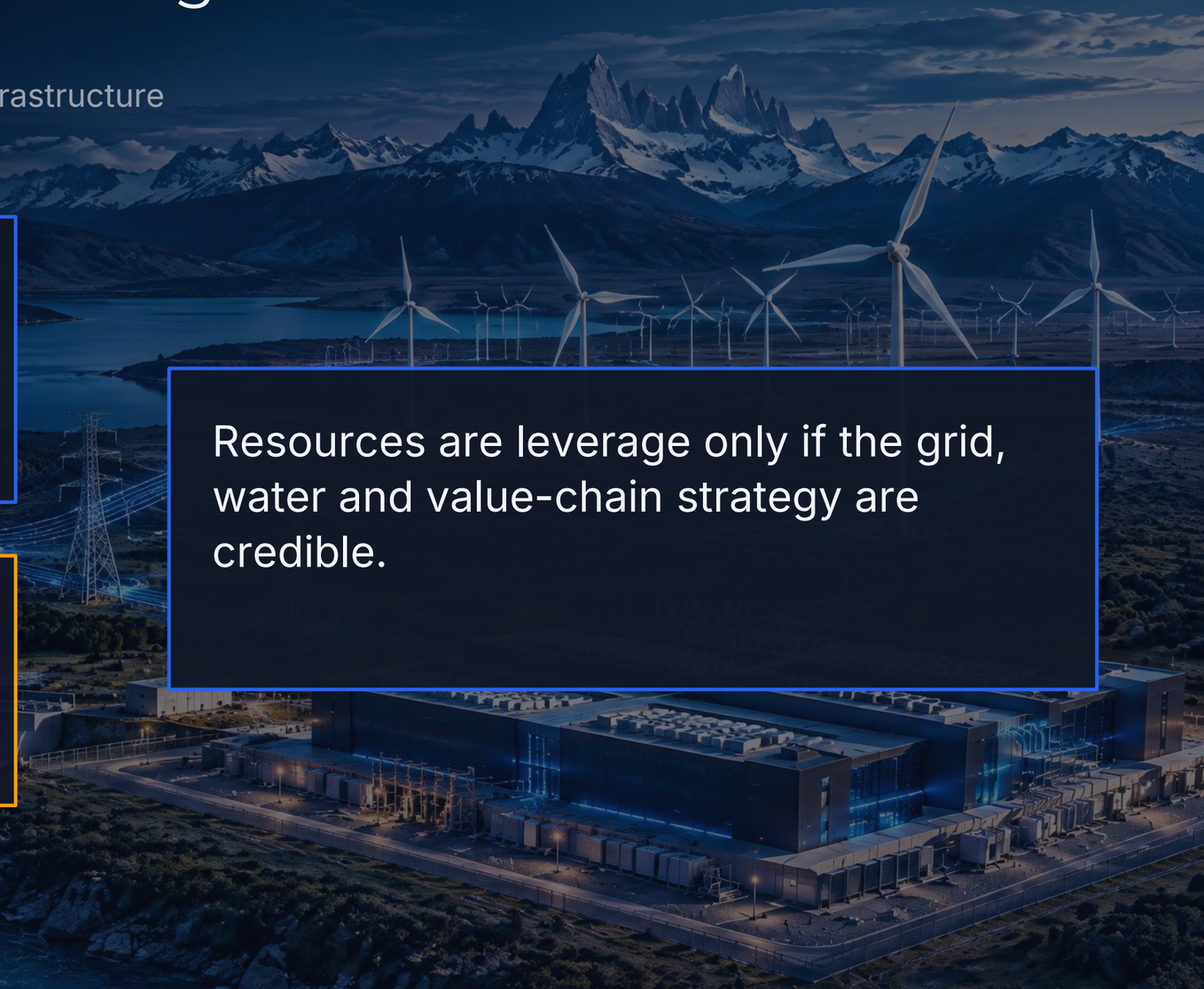
The asset base is meaningful. Turning it into compute-ready infrastructure is the harder step.

ENERGY BASE

49% of Argentina's 2024 total primary energy supply came from natural gas; non-hydro renewables met a record **18.9%** of power demand in 2025.

MINERAL POSITION

4.4m t of lithium reserves and an estimated **23,000 t** produced in 2025.



Resources are leverage only if the grid, water and value-chain strategy are credible.

Sources: IEA country profile for Argentina; CAMMESA, Informe Anual MEM 2025; USGS Mineral Commodity Summaries 2026: Lithium.

The real test is firm, clean and connected power.

For compute investment, Argentina should be judged on system readiness—not headline resource abundance.

1 · FIRM CAPACITY

Can the power system host stable compute load at credible cost?

New loads above 80 MW must now bring new supply; data centres need 115% firm capacity (Res. 264/2026).

2 · GRID MODERNIZATION

Are transmission and distribution ready to scale with demand?

The federal power-sector emergency has been extended to December 2027 (Decree 585/2026).

3 · WATER AND ACCEPTANCE

Can cooling, siting and community legitimacy hold up?

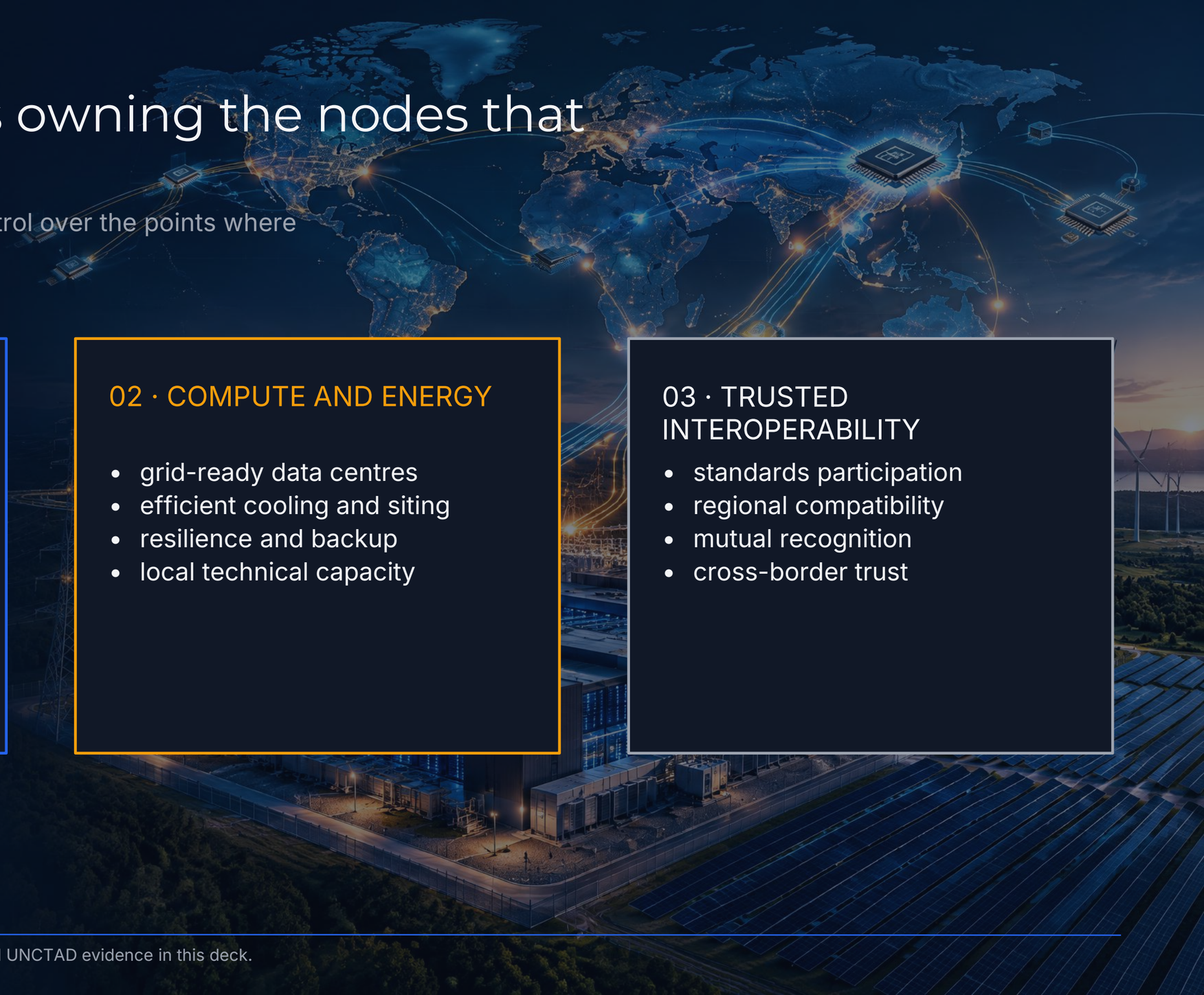
Global data-centre water use could roughly double to 1,200bn litres a year by 2030 (IEA, 2025).

Answer these first. Then attract the projects.

Sources: Energy Secretariat Resolution 264/2026; Decree 585/2026; EIA Argentina country analysis; IEA, Energy and AI (2025); UNCTAD, Digital Economy Report 2024.

Sovereignty means owning the nodes that matter.

The goal is not isolation. The goal is control over the points where dependence becomes asymmetry.



01 · DATA RULES

- trusted sharing
- privacy and auditability
- public-interest access
- interoperability by design

02 · COMPUTE AND ENERGY

- grid-ready data centres
- efficient cooling and siting
- resilience and backup
- local technical capacity

03 · TRUSTED INTEROPERABILITY

- standards participation
- regional compatibility
- mutual recognition
- cross-border trust

Framework synthesized from UN, OECD, World Bank, IEA and UNCTAD evidence in this deck.

Argentina can be a trusted regional bridge.

The bridge role is credible only if domestic rules, infrastructure and public institutions are strong enough to be trusted by others.

WHAT ARGENTINA CAN OFFER

- InteroperAR as a working public-sector exchange backbone
- AI transparency and data-protection guidance
- energy and mineral relevance
- a credible democratic voice in standards debates

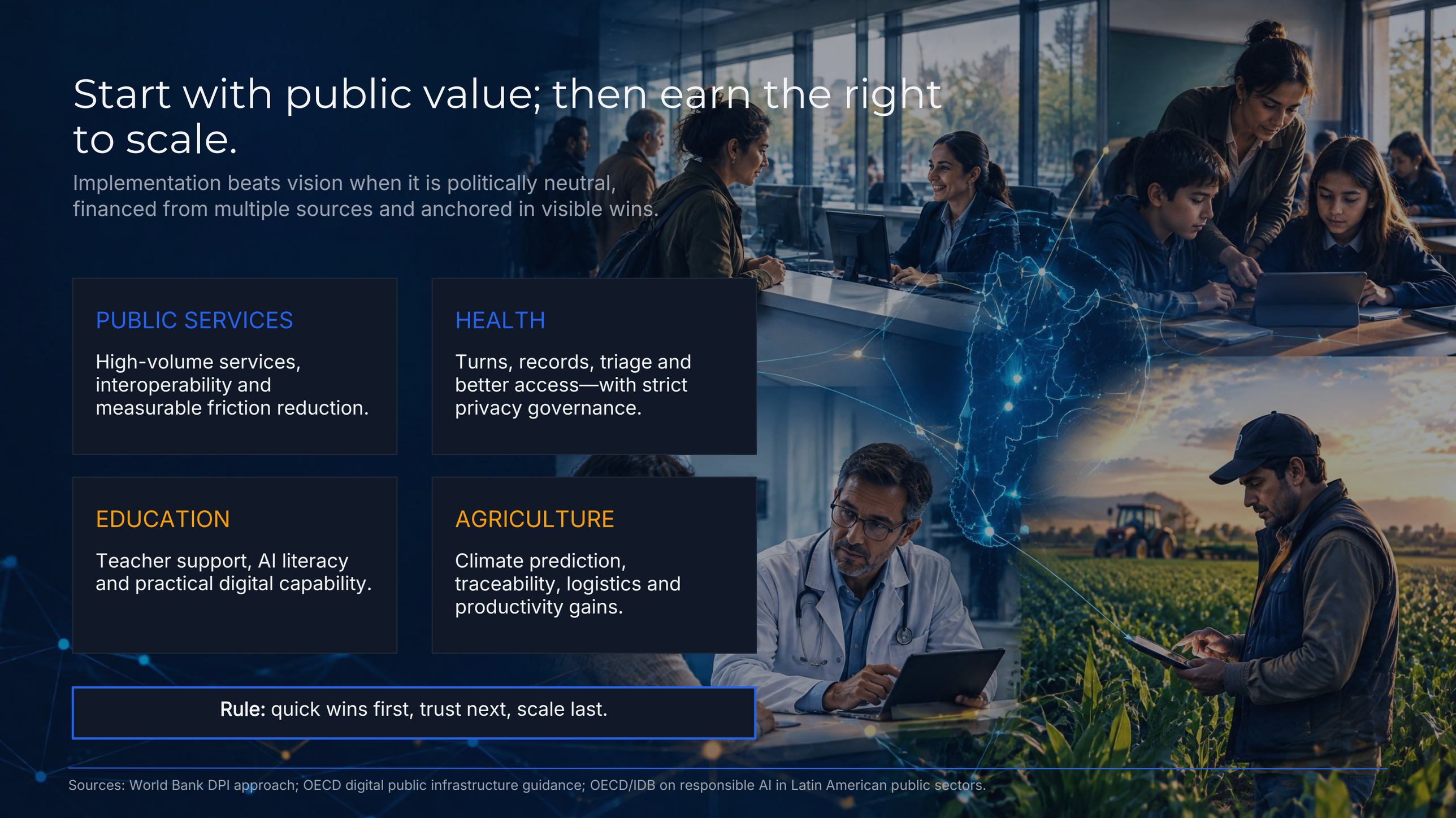
Positioning: a node between blocs—not a peripheral customer.



Sources: OECD Digital Government Outlook 2026: Argentina; AAIP national AI transparency and data-protection programme; UN and OECD work on inclusive AI governance.

Start with public value; then earn the right to scale.

Implementation beats vision when it is politically neutral, financed from multiple sources and anchored in visible wins.



PUBLIC SERVICES

High-volume services, interoperability and measurable friction reduction.

HEALTH

Turns, records, triage and better access—with strict privacy governance.

EDUCATION

Teacher support, AI literacy and practical digital capability.

AGRICULTURE

Climate prediction, traceability, logistics and productivity gains.

Rule: quick wins first, trust next, scale last.

Sources: World Bank DPI approach; OECD digital public infrastructure guidance; OECD/IDB on responsible AI in Latin American public sectors.

A 24-month path from intent to influence

The order matters: rules first, pilots second, durable institutions last.



Define the rules
Data sovereignty map, AI risk criteria, interoperability standards and disclosure rules.

Launch pilots
Bounded public-service, health, education and agro use cases with visible metrics.

Build the nodes
Compute siting, energy readiness, secure data exchange and technical talent.

Institutionalize
Multi-year funding, oversight, federal coordination and regional standards work.

Sequencing synthesized from World Bank, OECD and IDB implementation guidance for digital public infrastructure and AI in public services.

Sources | Governance, data and implementation

Full references used for the governance, digital-government and implementation argument.

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National Programme for Transparency and Personal Data Protection in the Use of Artificial Intelligence. https://www.argentina.gob.ar/programa-nacional-de-transparencia-y-proteccion-de-datos-personales-en-el-uso-de-la-inteligencia

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These are the primary governance, digital-government and implementation sources referenced on the factual slides.

Sources | Energy, minerals and environmental impacts

Full references used for the data-centre, grid, energy and mineral slides.

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Where source years or definitions differ, the slide language distinguishes between them rather than blending them.



MUCHAS GRACIAS