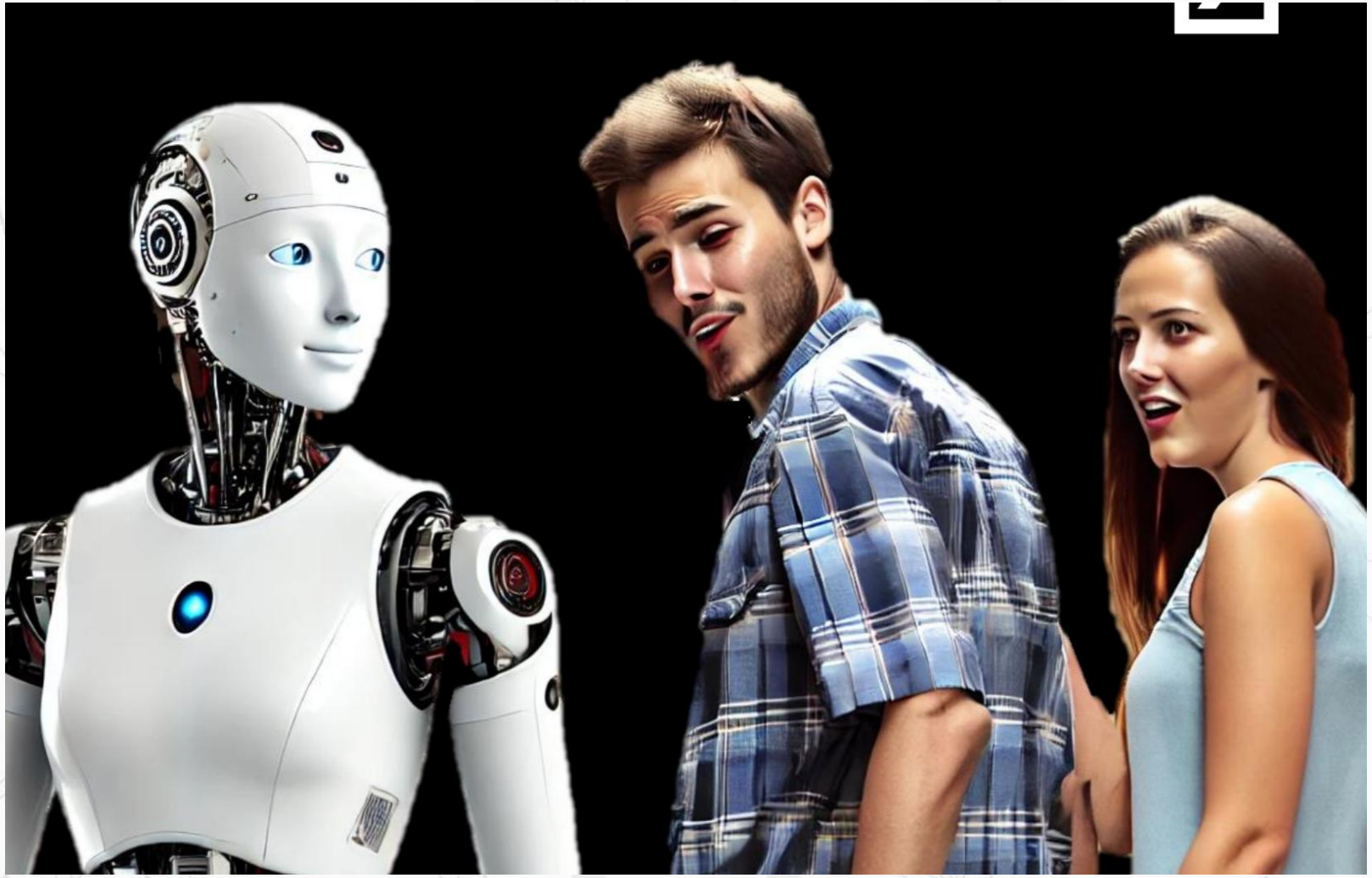
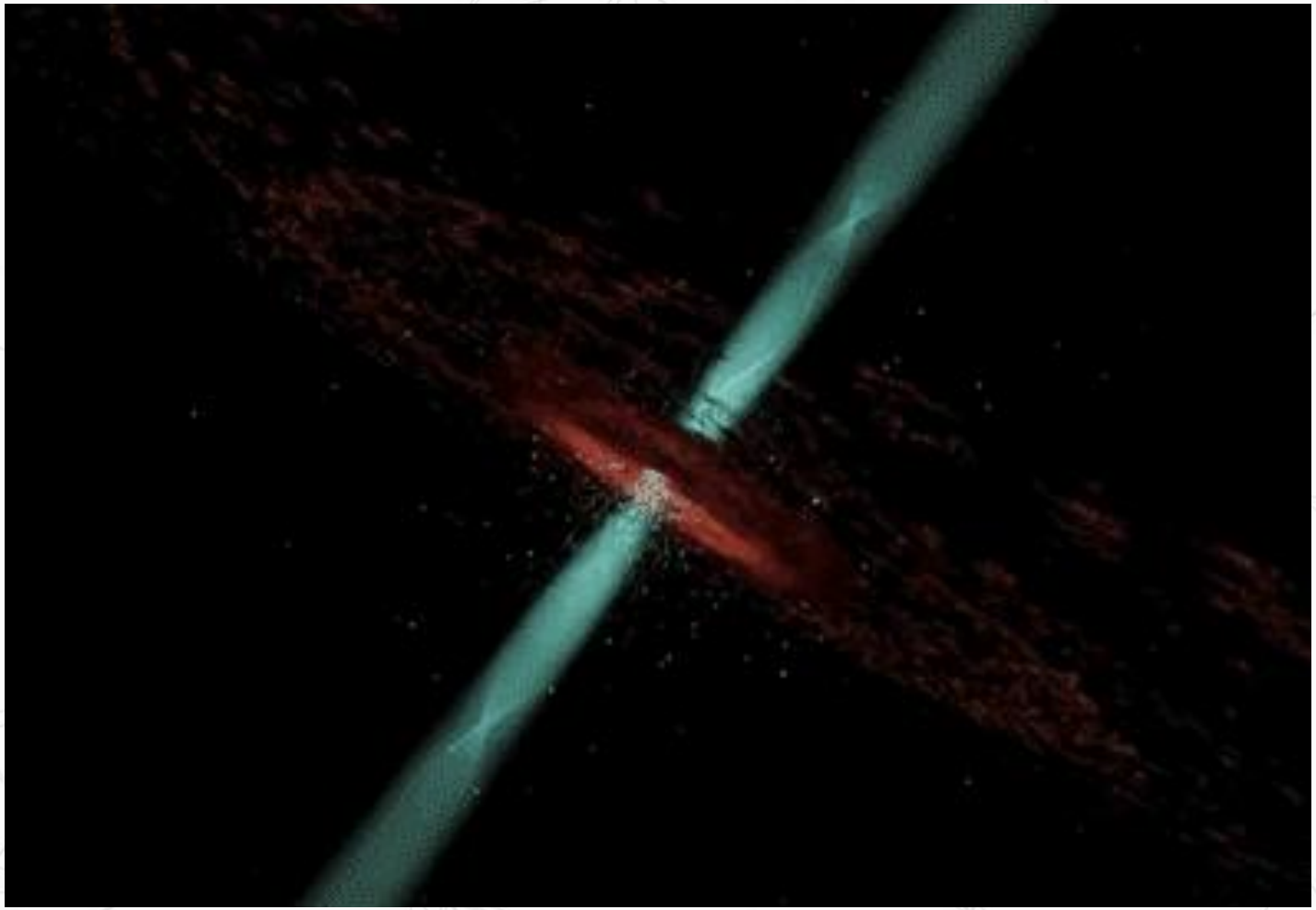
FLAR
FONDO LATINOAMERICANO DE RESERVAS

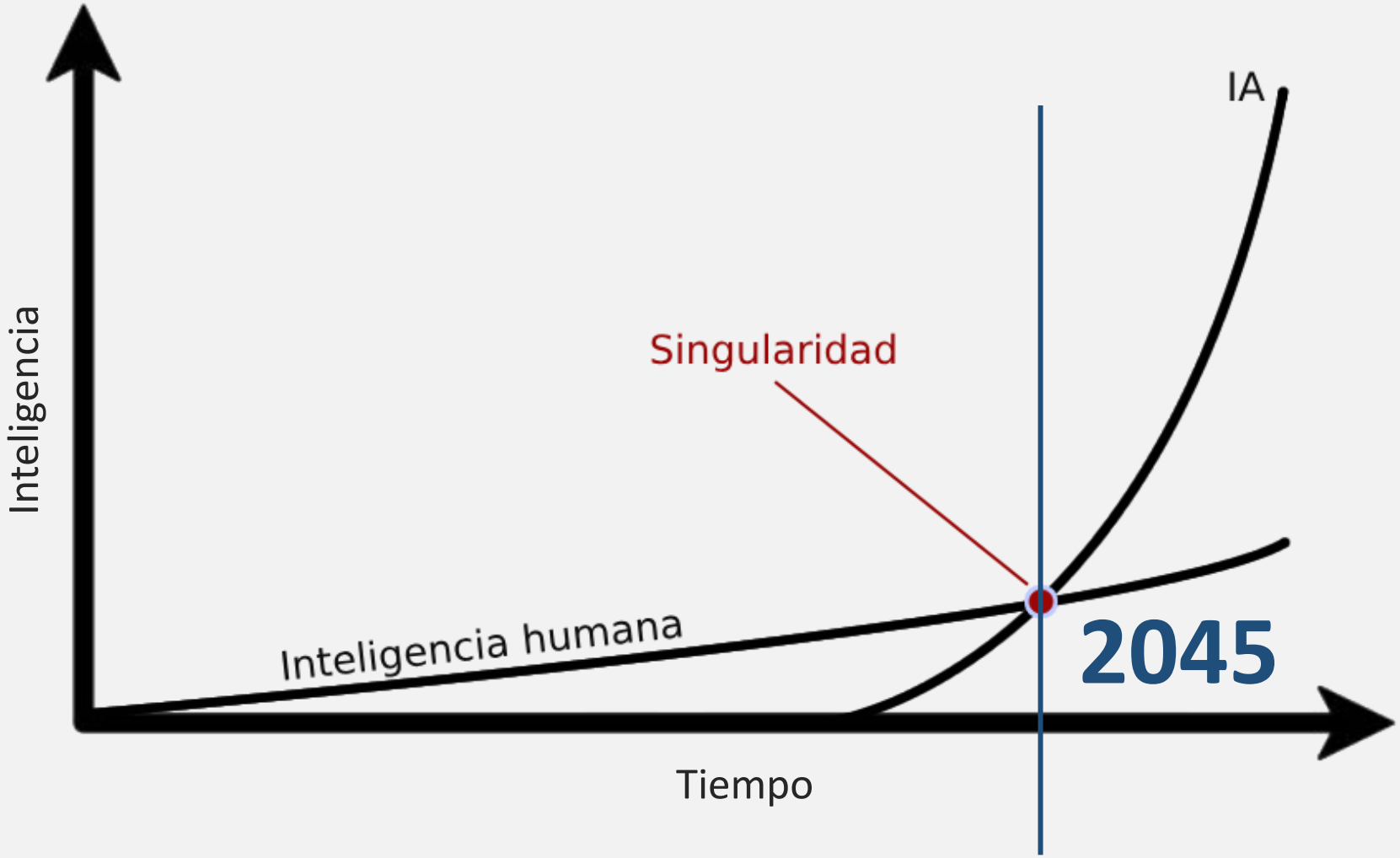
Reflexiones sobre el Futuro de la IA

Marzo 2025



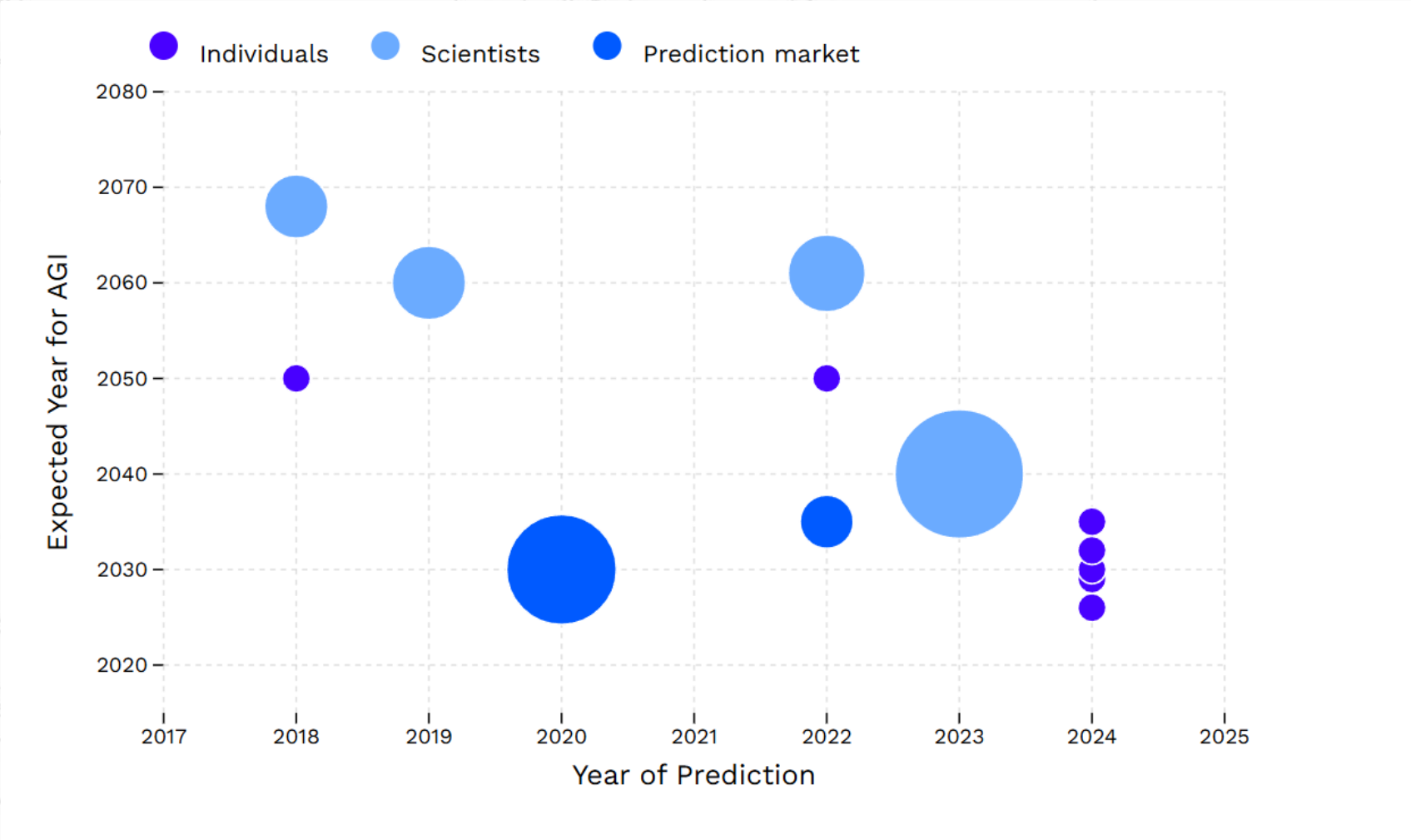
Singularidad en Física

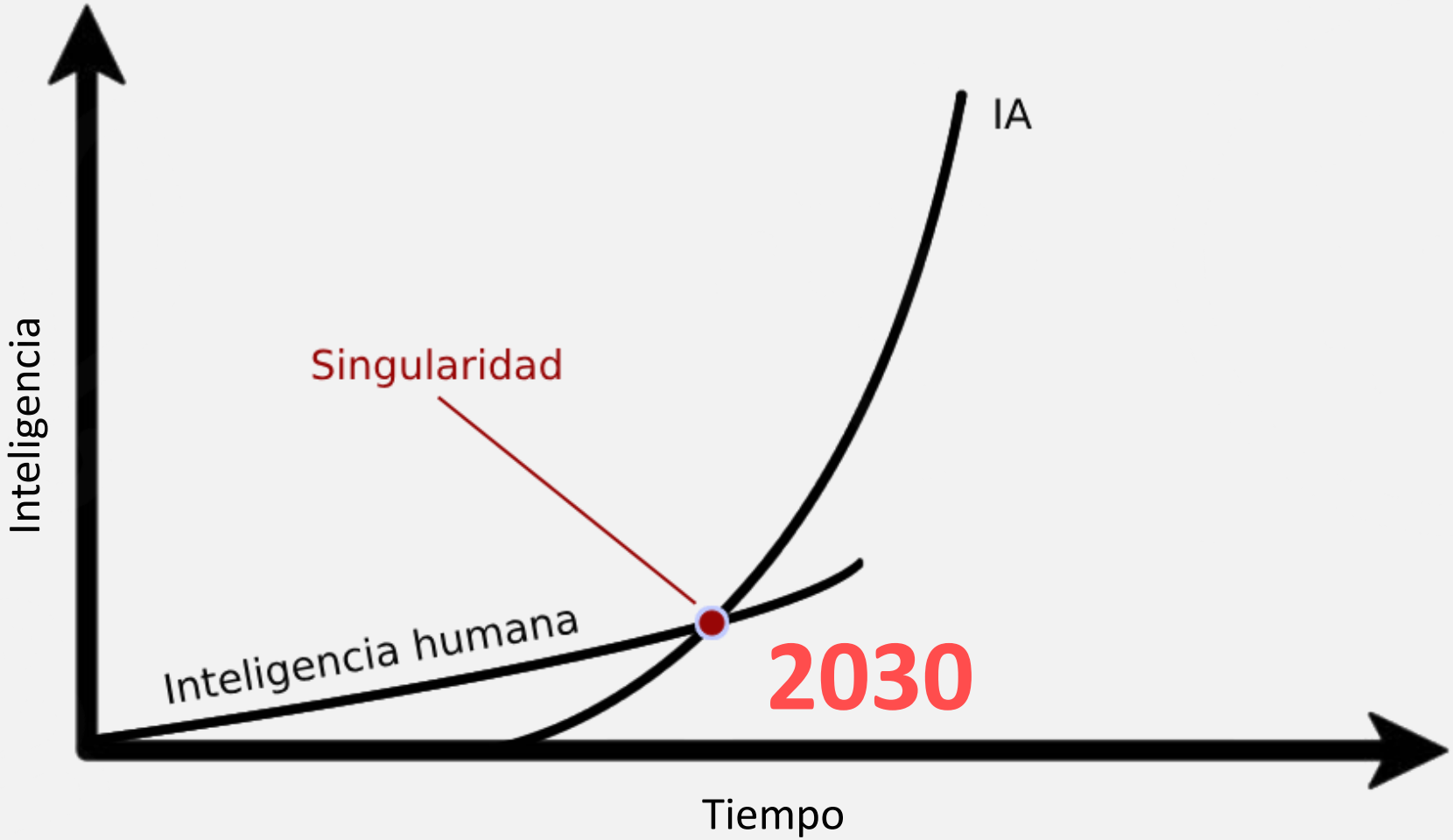



IA
Singularidad
Inteligencia humana
2045
Inteligencia
Tiempo

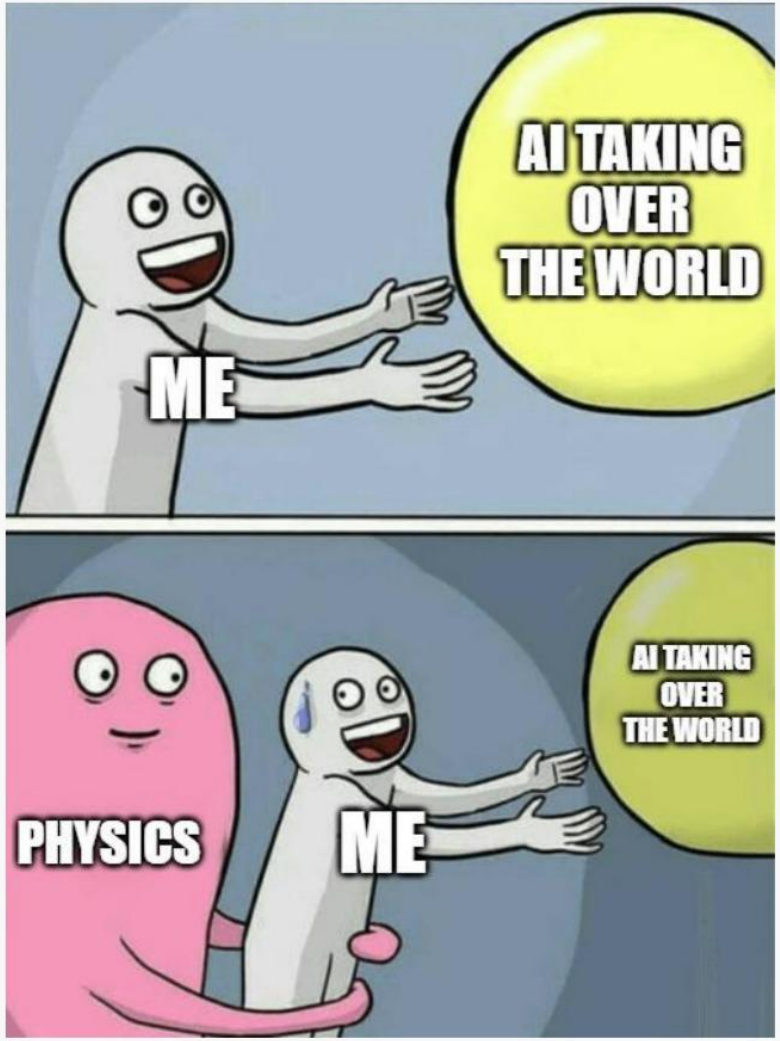
Cronología de la Inteligencia Artificial General

Esta cronología describe el año anticipado de la singularidad, basado en conocimientos recopilados de 15 encuestas, incluidas respuestas de 8,590 investigadores de IA, científicos y participantes en mercados de predicción.




IA
Singularidad
Inteligencia humana
2030
Inteligencia
Tiempo

Pero las predicciones científicas son notoriamente inexactas



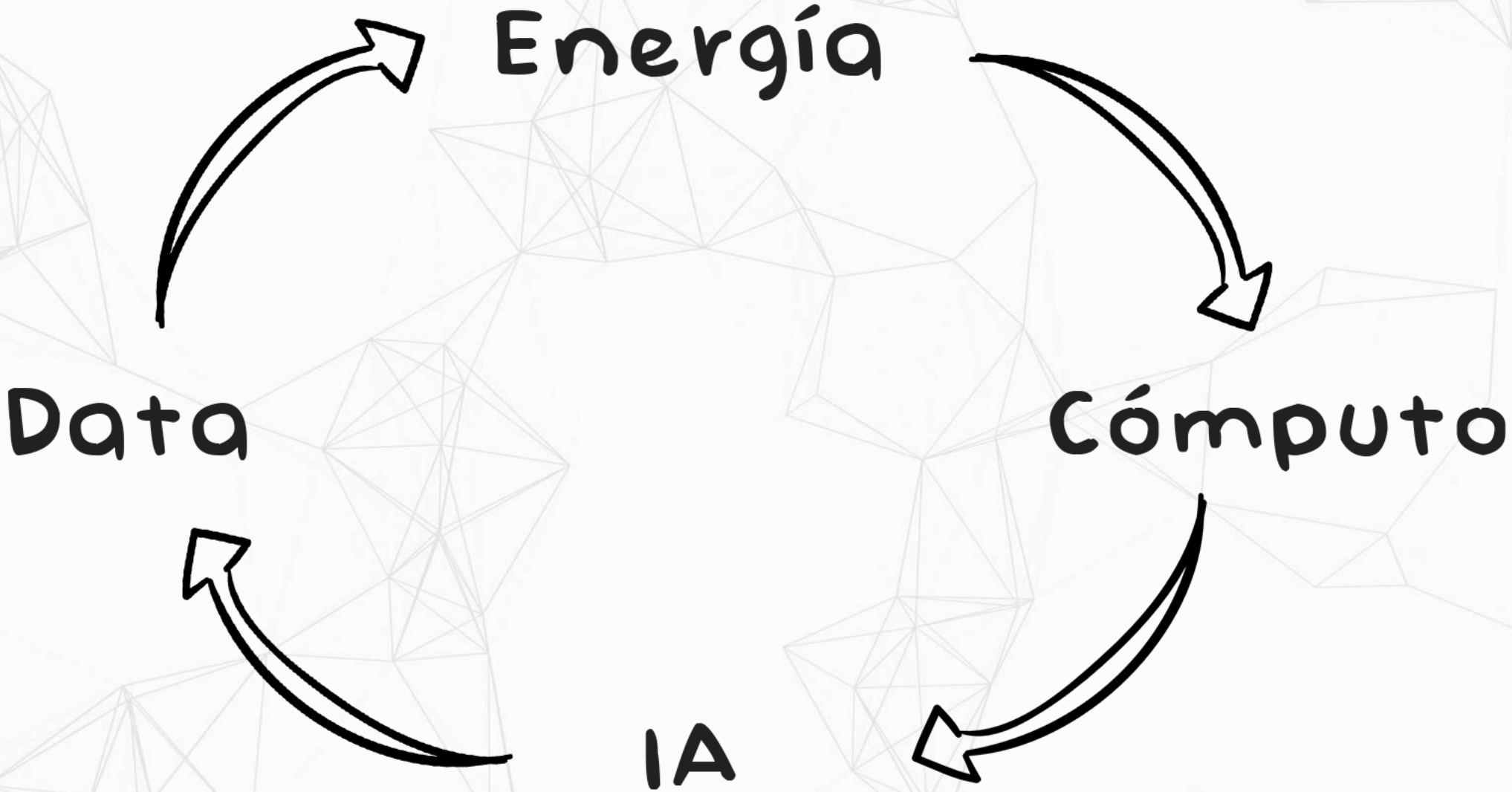
Marvin Minsky
AI pioneer
1970

In from three to eight years we will have a machine with the general intelligence of an average human being

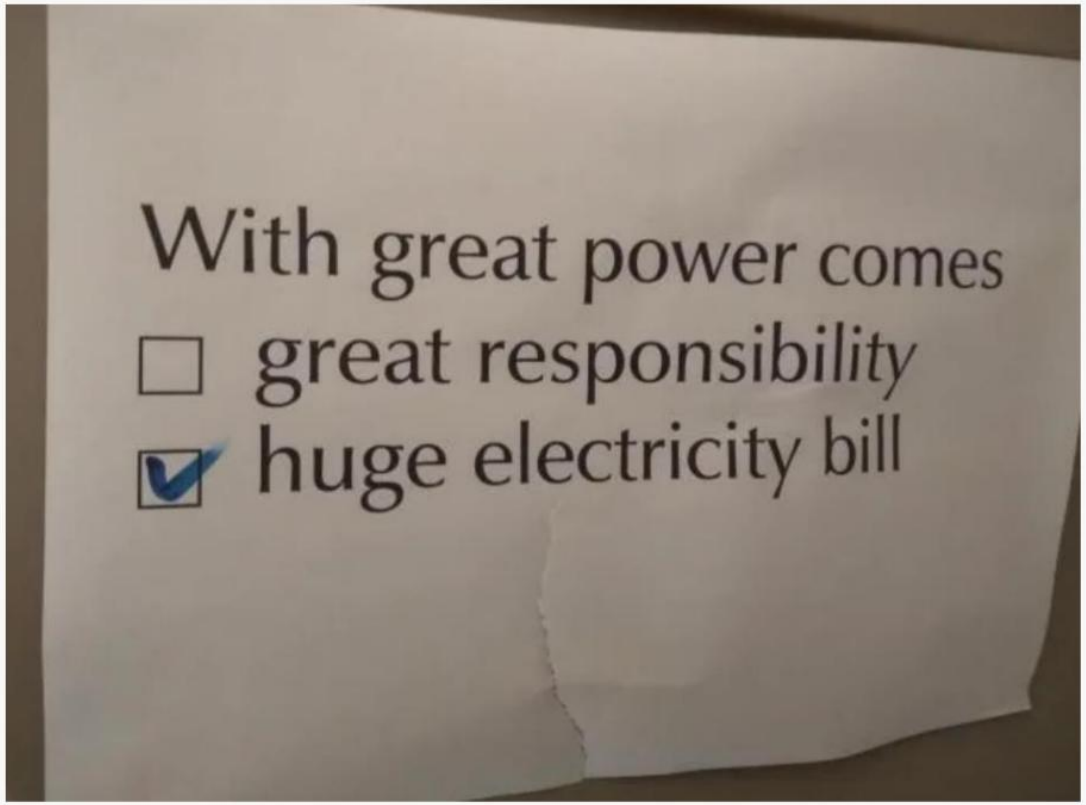
- Elon Musk says that AI will be smarter than a human by 2026. OpenAI's Sam Altman wrote this month that "we are now confident we know how to build AGI", or Artificial General Intelligence, while Anthropic CEO Dario Amodei points to AGI in 2026 or 2027.
- However, Musk said in 2015 that there would be self-driving cars in two years and AI godfather Geoff Hinton said in 2016 that radiologists would be obsolete in five years. Cynics point out that radiologists are still driving to work in regular cars today.
- Scientists have consistently underestimated how hard it is to achieve AGI, starting with the Dartmouth Conference in 1956. It launched AI research, expecting to make "a significant advance" over the course of the summer.

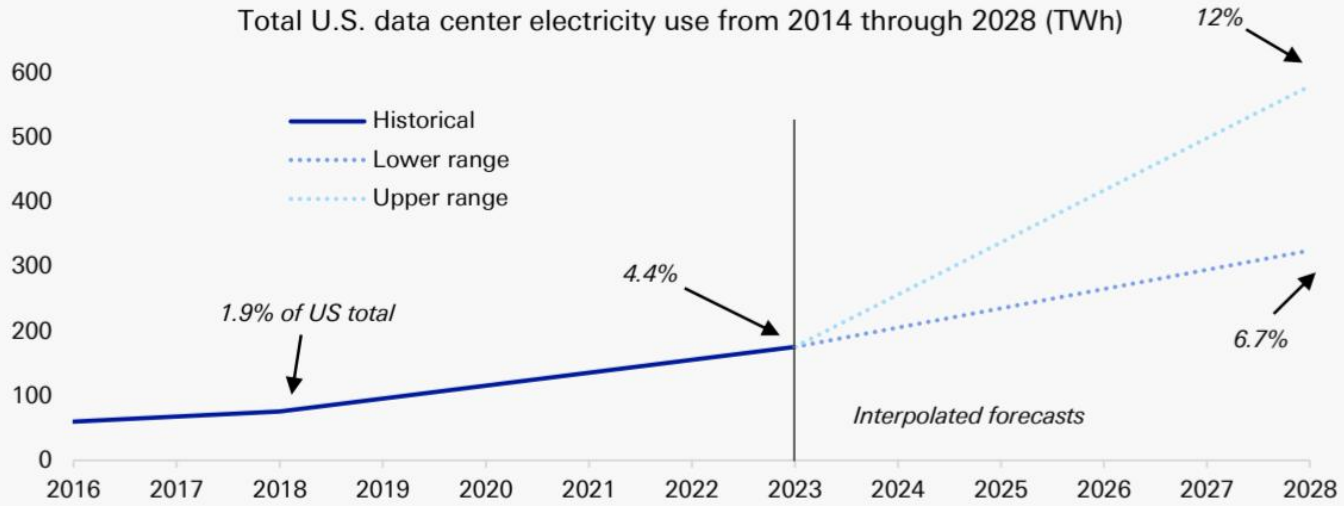
Source: Author, using imgflip

Fusión del mundo de bits y los átomos


Energía
Cómputo
IA
Data

La demanda de energía está aumentando



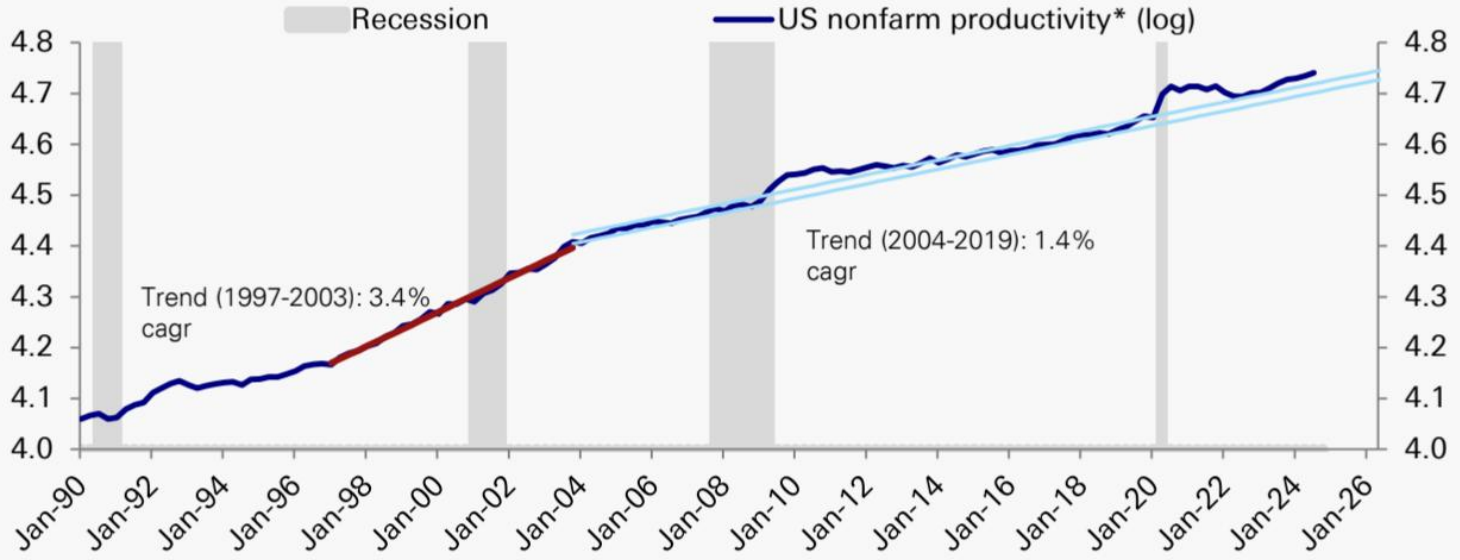


- AI applications are leading to surging demand for energy. Whether the proliferation of smaller models like DeepSeek affects that remains to be seen.
- Data centers consumed about 4.4% of total US electricity in 2023 and are expected to consume as much as 12% by 2028, the Department of Energy said.
- Hyperscalers, led by Amazon's AWS, Microsoft's Azure, Alphabet's Google Cloud and Meta, are driving demand for renewable energy. They are also trying to increase capacity by investing in small modular reactors, restarting old reactors and betting on new technology such as fusion.

Source: Via koehnsen on 9gag; Lawrence Berkeley National Laboratory, Deutsche Bank.

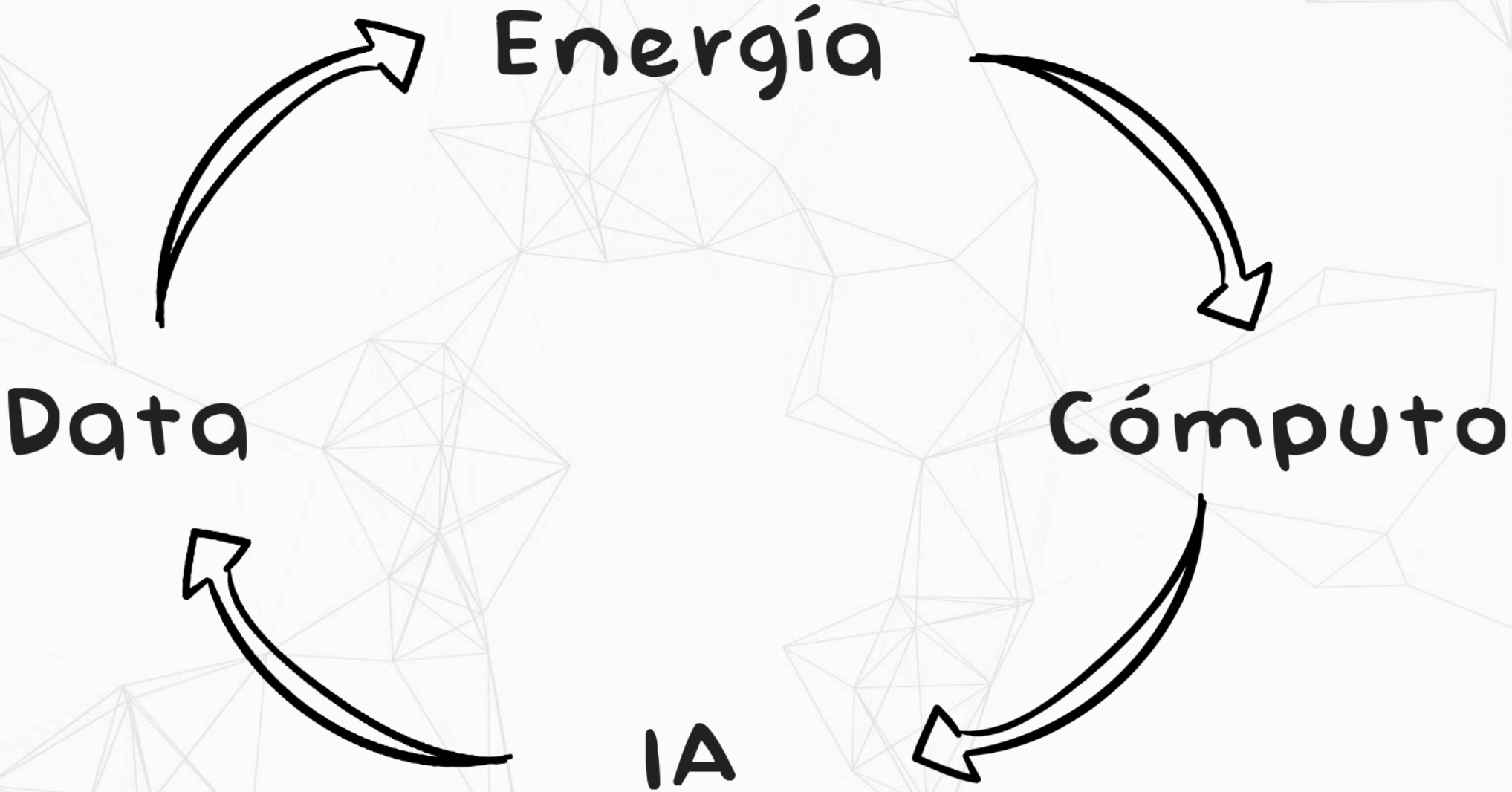
La economía no vive solo de la IA 👩‍💻

Source: Via yagash on Memedroid; BLS, Deutsche Bank.



- Some studies show programmers and customer agents who use genAI becoming 15-30% more productive. But economist Daron Acemoglu calculates that productivity growth may only reach 0.7% over 10 years when narrowed down to cost savings from tasks that can economically be performed by current genAI.
- Productivity in the US has been rising at an annual rate of 2.6% over the past six quarters, well above the norm of 1.5% since 1900.
- These periods of rapid growth have usually been a response to very low unemployment like that of the past two years. A scarcity of workers has pushed companies to find new ways to grow by adopting new technologies, like PCs in offices in the late 90s – and genAI right now.

For more, see Asset Allocation: Outlook 2025: What's Still To Come - Deutsche Bank Research (Nov 24, 2024)


Energía
Cómputo
IA
Data

Tasa de crecimiento tendencial del PIB

=

Crecimiento Poblacional

+

Crecimiento de la Productividad

+

Crecimiento de la Deuda

Humanoid Robots Are Debuting Around The World

Why the human form factor? Key is that a humanoid robot is generalizable. While a wrench can tighten nuts better than a human hand can, it is not a generalizable tool. The human hand is generalizable, particularly in an environment built by and designed for humans.