

Bolivia

Archetype **Stalled middle**

GDP / person **\$5k**

Population **12.58M**

10-yr trend **2%**

Gradual **7.6%** · #85

Fast **7.6%** · #92

WHERE BOLIVIA STARTS

Bolivia enters the AGI era as a stalled middle: middling income, middling scores, slow growth. Its ten-year trend growth is 2% a year, and GDP per person is about \$5,148 lower-middle-income. Two scores stand out. Demographics and migration score 4.7, near the top of the range, reflecting a young and growing population. Compute and energy access score 1, the floor. Bolivia has almost no data-center capacity. Its economy still runs on raw materials: natural gas sold to Brazil and Argentina, and mined ores that make up nearly a third of exports. The Salar de Uyuni holds some of the world's largest lithium reserves, but industrializing them has stalled for years. What is missing is the capacity to turn a young workforce into digital output.

THE THREE PATHS

These are simulations, not forecasts. The Modest path is the baseline; the two AGI scenarios fork from it. Under the Modest scenario, AI stays a normal technology. Bolivia would gain almost nothing on trend: 2.2% growth a year, 109th of 157. The raw-material economy would grind on much as today. Under **Gradual** takeoff, growth would climb over two decades and reach 7.6% a year once AGI matures around 2045. That would lift Bolivia to 85th in the world. An economy growing at 7.6% doubles in about nine and a half years. Under **Fast** takeoff, growth would reach the same 7.6% a year, but from the early 2030s, with the same doubling time. Yet Bolivia's rank would slip to 92nd, down seven places, because a fast world rewards the compute and frontier access Bolivia lacks. Faster global growth passes it by. Politics could slow or redirect any of these paths. How Bolivians and their government respond to transformative AI is a variable the model holds constant.

HOW YOU WOULD KNOW WHICH WORLD YOU ARE IN

The scenarios look almost the same until about 2030. Watch leading indicators, not GDP, and watch them live. Three global signals matter most. First, whether the METR task-horizon curve keeps doubling every four to five months through 2027–28; METR publishes it at metr.org. Second, whether frontier-lab revenue and capital spending keep compounding; Epoch AI tracks both at epoch.ai. Third, whether growth in the ten to twenty most-ready economies — the United States and China above all — breaks above trend in the early 2030s. Double-digit growth there within a couple of years of 2030 would signal a fast world. A point or two above trend by the mid-2030s would signal a gradual one. A fade back to trend

would signal a modest one. Bolivia's own signals would arrive earlier than the growth data: the terms of its lithium deals with Chinese and Russian partners, whether the plants at Uyuni actually ship, and any first commitment to host computing on Bolivian soil.

IF GROWTH GOES EXPLOSIVE

For Bolivia, explosive is the wrong word. At 7.6% growth a year, it would run below its own region's median and far below the frontier, where the United States could be compounding at nearly 40% a year in a fast world. This is catch-up by Bolivia's own history, not a breakout, but still a real change from 2% trend. The economy would double in about nine and a half years, so a child born today would reach adulthood in a country twice as rich. Rising wages at home would ease the pressure on young Bolivians to emigrate for work. There is a way this leaves Bolivia worse off. Its lithium and gas are developed largely by foreign partners on foreign terms. In an AI boom, Bolivia could stay a supplier of raw inputs while others capture the value, and the computing it uses would be rented, not owned. The hedge is to bargain for a share of processing and technology, not only royalties. Even modest acceleration would test the state: the YLB lithium company, the permitting offices, the courts, and public finances already strained by fuel and dollar shortages.

WHAT BOLIVIA CAN DO NOW

Three levers follow from the scores, and two of them pay off whether or not AGI arrives. The first is AI diffusion capacity, at 2.4. Digital skills, permissive rules for deployment and digital government carry real weight even in the skeptic's world, so this is a no-regret move: digitize government services first and teach AI skills across the workforce. The second no-regret lever is physical build speed, at 2.3. Faster permitting, pre-zoned land and transmission built ahead of demand help the economy under every scenario. The third lever is the bet. Compute and energy access, at 1, barely moves growth if AI stays ordinary, but under a fast takeoff it becomes Bolivia's single biggest lever. Closing it means packaging power and land to attract data-center investment, which is hard for a \$5,148-per-person economy to fund alone. Bolivia can learn from its own archetype: Brazil has drawn hyperscaler cloud regions by offering scale and stable power. A cautious government can act on the two no-regret levers today and lose nothing if the skeptics are right. Open the atlas's [policy editor](#) to see how moving these scores reshapes Bolivia's path under each scenario.

The three levers — and which pay off regardless

AI diffusion capacity

score 2.4 / 5 · weight 24 under skeptic → 13 under fast takeoff

Counts under the Modest scenario too (24→13). Closing this gap pays off whether or not AGI arrives.

No-regret

Compute & energy access

score 1 / 5 · weight 8 under skeptic → 24 under fast takeoff

Weight climbs from 8 to 24 as takeoff nears. It barely moves growth if AI stays ordinary — the lever that needs a view on the takeoff.

AGI bet

Physical build speed

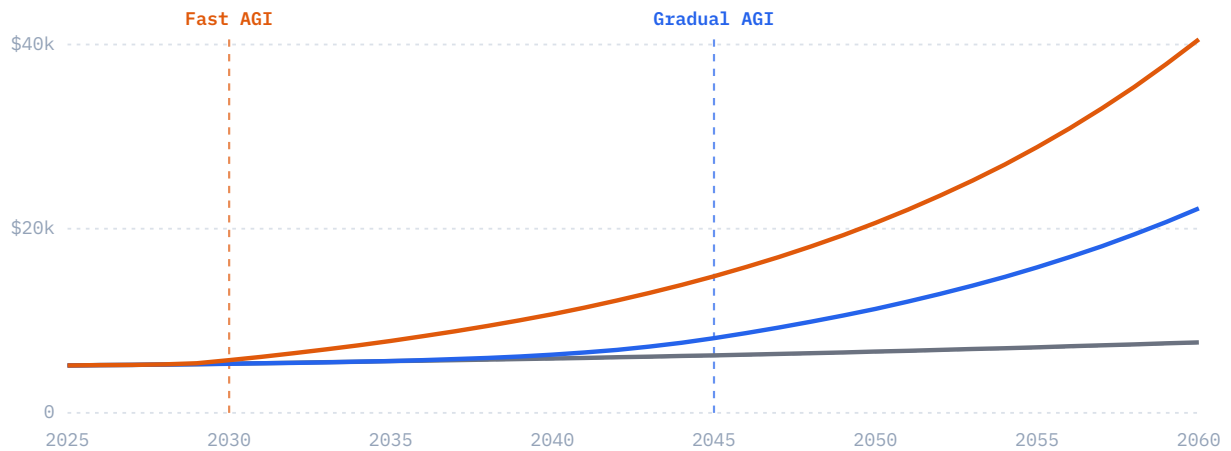
score 2.3 / 5 · weight 8 under skeptic → 17 under fast takeoff

Weight climbs from 8 to 17 as takeoff nears. It barely moves growth if AI stays ordinary — the lever that needs a view on the takeoff.

AGI bet

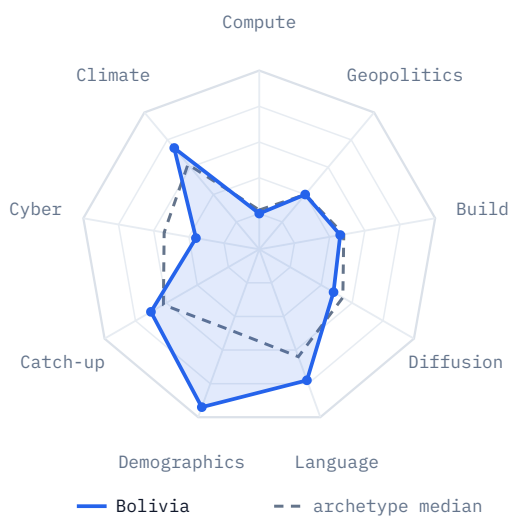
The no-regret levers pay off in every scenario, so a cautious government can act on them today. The AGI bets become decisive only if takeoff is real.

GDP per person to 2060, by scenario



Linear scale; solid lines are the three scenarios, dashed grey the no-AI baseline. Growth ramps from 2027 to each scenario's rate at its AGI year (Fast ~2030, Gradual ~2045), then holds. Timing and divergence are the point, not end levels; steep paths exit the top of the capped axis.

The nine factors



Solid: Bolivia. Dashed: the median of its archetype. Scores are relative to the other 156 countries (3 ≈ global median, 5 = leading today).

Outcomes under each scenario

SCENARIO	GROWTH / YR	WORLD RANK	INDEX	DOUBLING
Modest	2.2%	109 / 157	57.1	—
Gradual	7.6%	85 / 157	54.2	9.5 yrs
Fast	7.6%	92 / 157	47.4	9.5 yrs

Post-AGI growth rate, rank among 157 countries, AGI Growth Index (0–100, scenario-weighted), and the implied economy doubling time. The Modest path is the baseline the AGI scenarios fork from.

THE THREE SCENARIOS

Modest the Acemoglu view

AI as a normal productivity tool

Intelligence was never the binding constraint on growth, so AI delivers real but ordinary gains. Each country gets a one-time boost of a couple of percent of GDP, phased in through 2035; growth then returns to trend. The mainstream-economics view.

≤0.66% TFP over a decade — a one-time gain

Bolivia: 2.2% growth a year · #109 of 157

Gradual Erdil & Besiroglu, base case

Broad automation, on a long timeline

Broad automation of remote work arrives around 2045, with gains building slowly from the late 2020s. Growth then reaches up to ~20% a year for the best-positioned countries — ten times today's frontier trend. A slow arrival gives countries time to adapt, so the gains are wide but uneven.

up to ~20%/yr after 2045 — 10× the frontier trend

Bolivia: 7.6% growth a year · #85 of 157

Fast Erdil & Besiroglu, fast takeoff

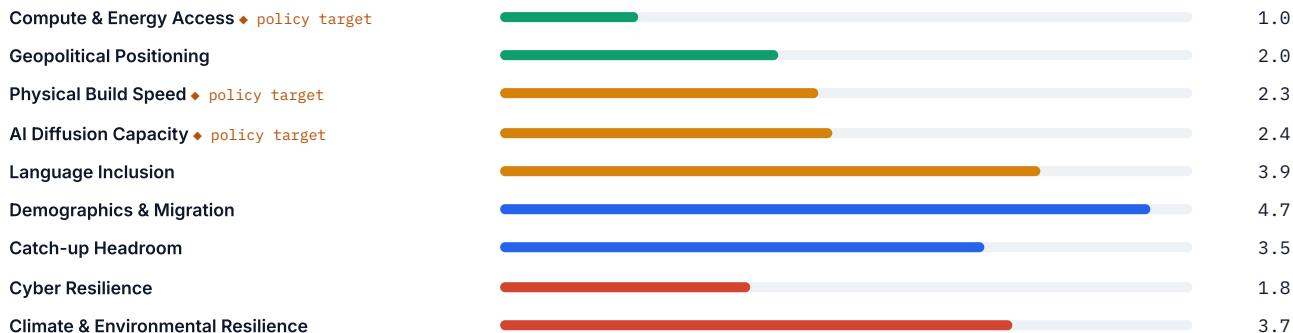
Fast takeoff — today's infrastructure decides

Transformation lands around 2030, before countries can adjust. Whoever already owns compute, capital and the ability to build wins; the gap between countries widens dramatically — and some are left growing slower than they would have without AGI.

up to ~40%/yr from 2030

Bolivia: 7.6% growth a year · #92 of 157

Factor scores — and where policy bites



♦ marks this country's highest-leverage policy targets: the weakest factors carrying the most weight under the AGI scenarios. The atlas's interactive policy editor (agigrowth.org/#editor) simulates how raising any score changes growth under each scenario.

Archetype: Stalled middle

Neither frontier nor fragile: middling income, middling scores, slow growth — at every size, from micro-states to Brazil.

Wins: No clean window — gains arrive imported, and late.

Watch: Drift: the gap to every faster group compounds year by year.

Jordan 11.8% · #37

Brazil 11% · #43

Mexico 10.4% · #48

Ecuador 10% · #54

Thailand 10% · #55

Slovakia 9.6% · #59

Argentina 9.5% · #61

Lithuania 9.3% · #63

Cabo Verde 9.3% · #64

Croatia 9.1% · #67

The regional picture — Mid-table, and outside the blocs.

Latin America enters the era mid-table on almost every factor — and mostly outside the blocs that decide access. Chile leads on institutions and hosts real compute; Brazil and Mexico have hyperscaler regions and huge domestic markets but thin R&D; Uruguay and Costa Rica absorb well at small scale; Guyana is converting an oil windfall into the hemisphere's fastest construction boom. The region's twenty-year question is what happens to nearshoring: the manufacturing and services work that moved toward Mexico and Central America on labor costs is the work automation reprices first, and no country here has a plan B at scale. Distance from the US-China rivalry cuts both ways — few export controls apply, and few strategic investments arrive. Under the modest lens the region loses little; under fast takeoff it drifts: gains arrive, mostly imported, mostly late, and the gap to the frontier compounds year by year.

Method, in brief

Each country is scored 1–5 on nine factors from public data (World Bank, Epoch AI, ITU, IMF and national sources). A scenario-weighted average forms the AGI Growth Index (0–100), which maps to a post-AGI growth rate inside ceilings derived from Erdil & Besiroglu (2023): ~20% growth a year for the best-positioned country under Gradual takeoff (AGI ~2045), ~40% under Fast (AGI ~2030); growth ramps convexly from 2027. The scenario sets the growth rates on offer; the index only decides where each country sits within them. The Modest scenario is the skeptics' baseline — a small uplift on each country's own ten-year trend. These are simulations for structured thinking, not forecasts; no probabilities are attached to any scenario.

Watch the global signals live: the METR task-horizon curve at metr.org/time-horizons · frontier-lab revenue at epoch.ai/ai-companies · AI-chip spending at epoch.ai/ai-chip-sales.

Explore further: full methodology agigrowth.org/#methodology · map & rankings agigrowth.org/#explore · country profiles agigrowth.org/#countries · policy editor agigrowth.org/#editor