

Guatemala

Archetype **Stalled middle**GDP / person **\$7k**Population **19M**10-yr trend **3.5%**Gradual **6.1%** · **#110**Fast **6.1%** · **#106**

WHERE GUATEMALA STARTS

Guatemala enters the AGI era as a stalled middle economy: middling income, middling scores, slow growth. The label fits the numbers. Its distinguishing strengths are people and language. Demographics and migration score 4.1, among the highest in its group, and Spanish-language inclusion scores 3.9. A young workforce and a widely spoken language are real assets. What holds it back is capacity. Compute and energy access scores 1.1, AI diffusion 1.8, cyber resilience 1.5 — near the bottom on all three. The economy runs on remittances from the United States, on coffee and cardamom exports, and on maquila textiles sold north. It also sells power to neighbors through the SIEPAC grid. Ten-year trend growth is 3.5% a year, and at about \$6,598 per person Guatemala is lower-middle-income. The gap to faster economies widens each year.

THE THREE PATHS

These are simulations, not forecasts. The Modest path is the baseline, and the two AGI scenarios fork from it. Under the **Modest** scenario, AI stays a normal technology. Guatemala would edge just above trend: 3.6% growth a year, 53rd of 157. That is close to its own history, driven by the same mix of remittances, farming and light manufacturing. Under **Gradual** takeoff, growth would climb over two decades and reach 6.1% a year only around 2045. Yet its rank would fall to 110th, because faster economies pull away. An economy growing at 6.1% doubles in under twelve years. Under **Fast** takeoff, growth would arrive from the early 2030s and settle at the same 6.1% a year, ranking 106th. The two AGI paths deliver near-identical rates for Guatemala; what changes is how soon they arrive. The world simply moves faster around it, so gains come imported and late. Regulation and politics could slow or redirect any path. How Guatemalans and their leaders 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, so 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. Guatemala's own signals would arrive earlier than the growth data: the order books of the maquila textile plants, adoption in the Spanish-language call-center and outsourcing firms, and any hyperscaler or power-export contracts tied to the SIEPAC grid.

IF GROWTH GOES EXPLOSIVE

Explosive is the wrong word here. At 6.1% growth a year, Guatemala would trail both the frontier and its own region. The United States would be compounding at several times that rate, and the Latin American median would run higher too. This is catch-up that does not catch up: the gap widens even as Guatemala outpaces its own past. Still, 6.1% doubles the economy in under twelve years, so a child born today would finish school in a country twice as rich. Rising labor demand and wages at home would ease the pressure to emigrate, which matters for a country that sends so many workers north. There is a way this leaves Guatemala worse off. Its skilled young people are its main asset, and a fast world bids hard for builders and engineers, so brain drain could deepen rather than ease. Compute rented from abroad can be repriced or cut off by others. The hedge is to keep talent and own capacity, not rent both. Even a modest lift would test the state — the tax authority SAT, the electricity regulator CNEE, municipal permitting offices and the courts — whose weakness already caps what Guatemala can build.

WHAT GUATEMALA 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, at 1.8. Digital skills, permissive deployment rules and digitizing government services carry real weight even in the skeptic's world, so this is a no-regret move Guatemala can start today. The second is physical build speed, at 2.1. Statutory permitting deadlines, one-stop approvals and building transmission ahead of demand help under every scenario, and they are the same inputs any later data-center build would need — a second no-regret step. The third lever is the bet: compute and energy access, at 1.1, Guatemala's lowest score. It barely moves growth if AI stays ordinary, but under fast takeoff it becomes the single biggest lever. Closing it means packaging power, land and quick permits to draw investment, since a \$6,598-per-person economy cannot fund the build alone. Guatemala can adapt a working model from its own archetype: Mexico turned Querétaro into a hyperscaler data-center cluster by pairing reliable power with pre-zoned land. Open the atlas's [policy editor](#) to see how moving these scores reshapes Guatemala's path under each scenario.

The three levers — and which pay off regardless

AI diffusion capacity

score 1.8 / 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 1.1 / 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

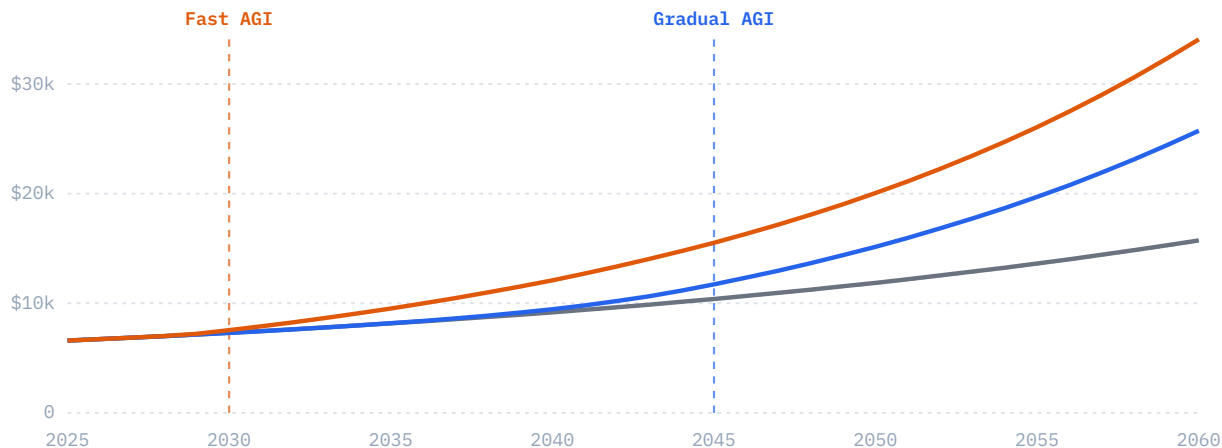
score 2.1 / 5 · weight 8 under skeptic → 17 under fast takeoff

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

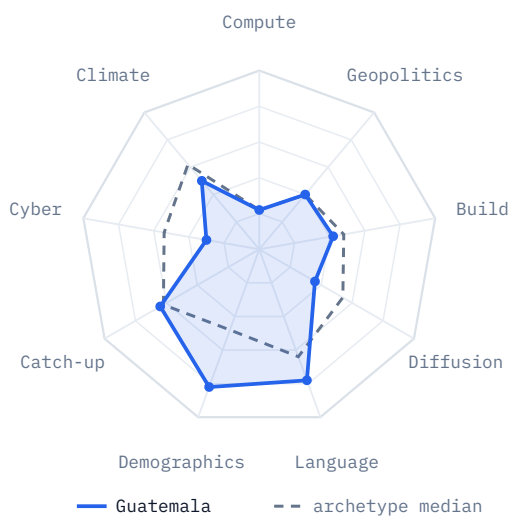
The no-regret levers pay off in every scenario, so a cautious government can act on them today. The AGI bets become decisive only if takeoff is real.

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: Guatemala. 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	3.6%	53 / 157	49.2	19.6 yrs
Gradual	6.1%	110 / 157	47.1	11.7 yrs
Fast	6.1%	106 / 157	42.5	11.7 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

Guatemala: 3.6% growth a year · #53 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

Guatemala: 6.1% growth a year · #110 of 157

Fast Erdil & Besiroglu, fast takeoff

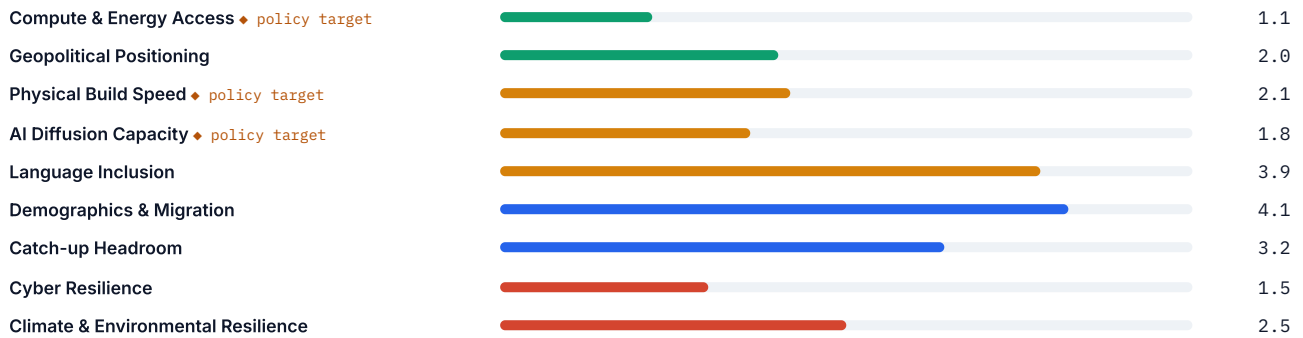
Fast takeoff — today's infrastructure decides

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

Guatemala: 6.1% growth a year · #106 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