

India

Archetype **Conditional demographic giants**

GDP / person **\$3k**

Population **1464M**

10-yr trend **6.1%**

Gradual **14.7%** · **#16**

Fast **22.8%** · **#20**

WHERE INDIA STARTS

India enters the AGI era as the largest of the conditional demographic giants — countries whose scale and youth become an asset only if power, connectivity and capital arrive in time. The scores show why. Physical build speed is 4.9 out of 5, near the top of the world. Catch-up headroom is 4.3 and demographics 4.2: a young workforce with a long distance still to travel. India also runs the world's second-largest online workforce, English at scale, and digital public infrastructure — Aadhaar identity and UPI payments — that few countries match. The constraints are real. Climate and environmental resilience scores 1.3, among the world's lowest. Language inclusion is 1.8, because most of India's languages sit outside frontier models. Compute and energy access is a middling 3.4. At about \$2,702 per person, India is lower-middle-income. Ten-year trend growth is 6.1% a year.

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. India would still grow 6.4% a year, 7th of 157, because its size and catch-up room carry weight even in a skeptic's world. That doubles the economy in about eleven years. Under **Gradual** takeoff, growth would climb across two decades and reach 14.7% a year once AGI matures around 2045, ranking 16th. At that rate the economy doubles in about five years. The long runway gives India time to move its vast services sector from back office to builder. Under **Fast** takeoff, growth would reach 22.8% a year from the early 2030s, a doubling every three to four years. Yet India's rank would slip four places to 20th, because a fast world rewards the frontier compute and chip access India does not yet own. Regulation and politics could slow or redirect any path. How Indians and their government respond to transformative AI is a variable the model holds constant.

HOW YOU WOULD KNOW WHICH WORLD YOU ARE IN

The three scenarios look almost the same until about 2030. Watch leading indicators, not GDP, and check 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 a gradual one; a fade back to trend a modest one. India's own signals would arrive earlier than the GDP data: the order books of TCS, Infosys and Wipro, financial close and yields at the Micron Sanand and Tata Dholera fabs, and hyperscaler data-center commitments under the IndiaAI Mission.

IF GROWTH GOES EXPLOSIVE

Explosive is relative. At 14.7% growth a year under gradual takeoff, India would trail a frontier compounding at 19.5%, but it would run far ahead of its region, where the median is about 9.1%. Under fast takeoff the gap widens: 22.8% at home against 39.2% at the frontier. Still, an economy growing near 15% doubles in about five years, so a child starting school today would finish it in a country several times richer. The services sector could shift from serving foreign clients to building its own products. Rising labor demand would lift wages and ease the pressure to emigrate for work. There is a way this leaves India worse off, and it is worth naming. India rents most of its frontier compute and buys its advanced chips inside another power's export regime. Decisions made in Washington or Taipei could throttle or reprice that access. The hedge is to own capacity, not rent it, through the fab and data-center build. Even then, the pace-setter would shift to the state, testing state power utilities, land acquisition and India's crowded courts.

WHAT INDIA CAN DO NOW

Three levers follow from the scores, and two pay off whether or not AGI arrives. The first is AI diffusion, a relative strength at 3.1 built on Aadhaar and UPI. Skills, permissive deployment and digital government carry the most weight in the skeptic's world, so widening AI literacy and easing data and procurement rules is a no-regret move. The second is climate and water resilience, very low at 1.3. Flood, heat and water defense protects the economy under every scenario, and cooling and water are the very inputs a data-center build would need — no-regret again. The third lever is the bet. Compute and energy access, at 3.4, carries the heaviest weight of all under fast takeoff but moves growth little if AI stays ordinary. Closing it means fast-tracking grid links, new generation and power-and-land packages for hyperscalers. India can adapt a peer's model: Vietnam's FPT built an AI factory with Nvidia to host frontier compute at home. A cautious government can act on the two no-regret levers today and lose nothing. Open the atlas's [policy editor](#) to see how moving these scores reshapes India's path under each scenario.

The three levers — and which pay off regardless

AI diffusion capacity

score 3.1 / 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

Climate & water resilience

score 1.3 / 5 · weight 8 under skeptic → 7 under fast takeoff

Counts under the Modest scenario too (8→7). Closing this gap pays off whether or not AGI arrives.

No-regret

Compute & energy access

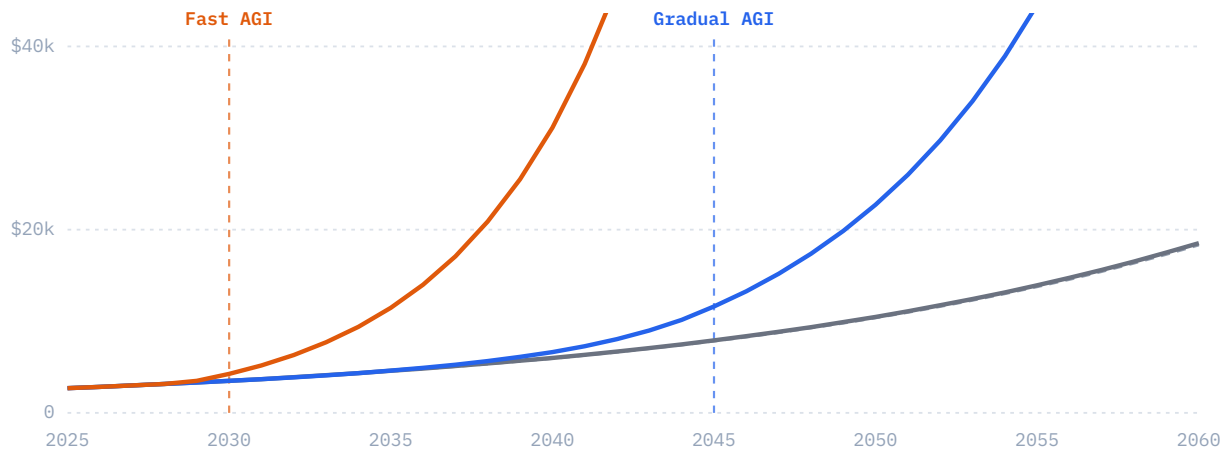
score 3.4 / 5 · weight 8 under skeptic → 24 under fast takeoff

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

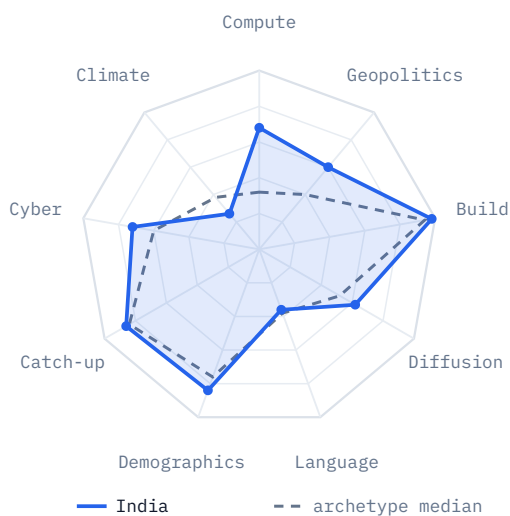
The no-regret levers pay off in every scenario, so a cautious government can act on them today. The AGI bet becomes decisive only if takeoff is real.

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: India. 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	6.4%	7 / 157	67.9	11.2 yrs
Gradual	14.7%	16 / 157	67.9	5.1 yrs
Fast	22.8%	20 / 157	68.2	3.4 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

India: 6.4% growth a year · #7 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

India: 14.7% growth a year · #16 of 157

Fast Erdil & Besiroglu, fast takeoff

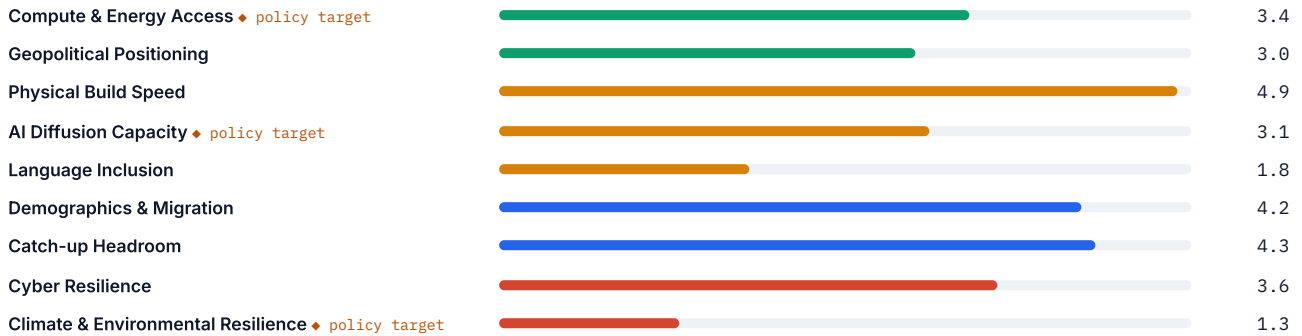
Fast takeoff — today's infrastructure decides

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

India: 22.8% growth a year · #20 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: Conditional demographic giants

Scale and youth are the asset — if power, connectivity and capital arrive in time. Every member is already climbing, or has its demographic dividend still ahead.

Wins: Mid-to-late, and only conditionally.

Watch: The dividend is the very labor AI substitutes for; the export ladder can be kicked away.

Vietnam **13.3%** · #23

Philippines **13%** · #29

Indonesia **12.4%** · #35

Uzbekistan **11%** · #44

Kenya **10.3%** · #51

Bangladesh **10.3%** · #52

Egypt **10.2%** · #53

Tanzania **9.4%** · #62

Ethiopia **8.6%** · #76

Uganda **7.6%** · #86

The regional picture — One giant, five satellites.

India enters the era with the world's second-largest online workforce, English at scale, real if modest frontier compute, and a services-export sector that is both its proof of absorption and its exposure: the remote cognitive work AGI automates first is what India sells. Under the gradual lens its absolute gains are among the world's largest; under fast takeoff the question is whether a decade is long enough to climb from back office to builder. Geopolitically India hedges — Quad membership and deep US technology ties without alliance obligations — which has so far bought access without dependence. Bangladesh faces the era's hardest version of the ladder problem: its garment-led growth model assumes rich countries keep importing labor-intensive goods, an assumption automation erodes year by year. Pakistan has the youth without the complements; Sri Lanka and Nepal absorb at the margin; the Maldives imports everything. To an unusual degree, the region's fortunes over twenty years are one country's fortunes.

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