

Jamaica

Archetype **Stalled middle**GDP / person **\$8k**Population **2.84M**10-yr trend **1.6%**Gradual **6.5%** · **#103**Fast **6.8%** · **#98**

WHERE JAMAICA STARTS

Jamaica enters the AGI era in the stalled middle: middling income, middling scores, slow growth. It is neither frontier nor fragile. One score stands out. Language inclusion is 4.9 out of 5, near the top of the world, because English is the working language. That strength built Jamaica's business-process outsourcing sector, the call centers and back-office firms clustered around Montego Bay and Kingston. AI diffusion capacity is 3.5 and catch-up headroom 3.9, both above the archetype median. The constraints are physical. Compute and energy access scores 1, the lowest band, since Jamaica has almost no data-center capacity. Physical build speed is 1.8. At about \$8,003 per person and ten-year trend growth of 1.6% a year, the economy leans on tourism, bauxite and alumina, and money sent home by the diaspora.

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. Jamaica would gain almost nothing on trend: 1.8% growth a year, 121st of 157. Better software tools would arrive as cheaper imported services, not owned capability. Under **Gradual** takeoff, growth would build for two decades and reach 6.5% a year once AGI matures around 2045, ranking 103rd. An economy growing at 6.5% doubles in about 11 years. English and a workable digital sector let Jamaica absorb cheaper AI services faster than most of its region. Under **Fast** takeoff, growth would reach 6.8% a year from the early 2030s, a doubling roughly every ten and a half years, and Jamaica would rank 98th. The gains stay modest in every world, because the compute and build scores a fast world rewards are low. Regulation and politics could slow or redirect any path. How Jamaicans 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. In each, the late 2020s add only fractions of a point to growth. So watch leading indicators, not GDP, and check them live rather than trust any snapshot. 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 mean a

fast world. A point or two above trend by the mid-2030s would mean a gradual one. A fade back to trend would mean a modest one. Jamaica's own tells would come earlier than the GDP figures: the contract volumes of the outsourcing firms, tourism bookings from wealthier source markets, and any hosting or connectivity commitments landing on the island.

IF GROWTH GOES EXPLOSIVE

Explosive is relative, and for Jamaica the honest word is modest. At 6.5% growth a year it would run ahead of the Caribbean median of 3.1% and well ahead of its own 1.6% trend. But it would fall far behind a frontier compounding at 19.5%, and further still at the fast rate of 39.2%. The economy would double in about 11 years, so a child starting school now would finish it in a country twice as rich. Growth would come from services and tourism, not a build boom Jamaica cannot finance. Rising wages at home would ease the pressure that pushes nurses, teachers and coders to emigrate. There is a way this leaves Jamaica behind, and it is worth naming. The gains arrive as compute Jamaica rents from abroad, not capacity it owns, and rented capacity can be repriced or throttled by decisions made elsewhere. A frontier growing far faster would also pull skilled Jamaicans harder. The hedge is to keep the wage gap closing and to own more of the digital stack over time. Even then, the pace-setter shifts to the state, testing how fast NEPA, the utility regulator and the parish councils can permit, connect and adjudicate.

WHAT JAMAICA CAN DO NOW

Three levers follow from the scores, and two pay off whether or not AGI arrives. The first is physical build speed, low at 1.8. Statutory time limits on approvals, one-stop permitting and pre-zoned land would lift ordinary growth and prepare the ground for any energy or hosting project. That is a no-regret move. The second is geopolitical positioning, at 2. Keeping access to capital markets, avoiding sanctions exposure and joining trusted-partner technology frameworks matters in every scenario, so it is also no-regret. Protect the language and diffusion strengths that already carry the outsourcing sector rather than let them erode. 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 Jamaica's single biggest lever. Closing it means packaging power, land and fast permits, and finding co-investment a \$23bn economy cannot raise alone. Cabo Verde, a fellow small-island member of this archetype, built its TechPark to anchor digital-services investment; Jamaica could adapt that model. Open the atlas's [policy editor](#) to see how moving these scores changes Jamaica's path under each scenario.

The three levers — and which pay off regardless

Compute & energy access

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

AGI bet

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.

Physical build speed

score 1.8 / 5 · weight 8 under skeptic → 17 under fast takeoff

AGI bet

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.

Trusted chip & tech access

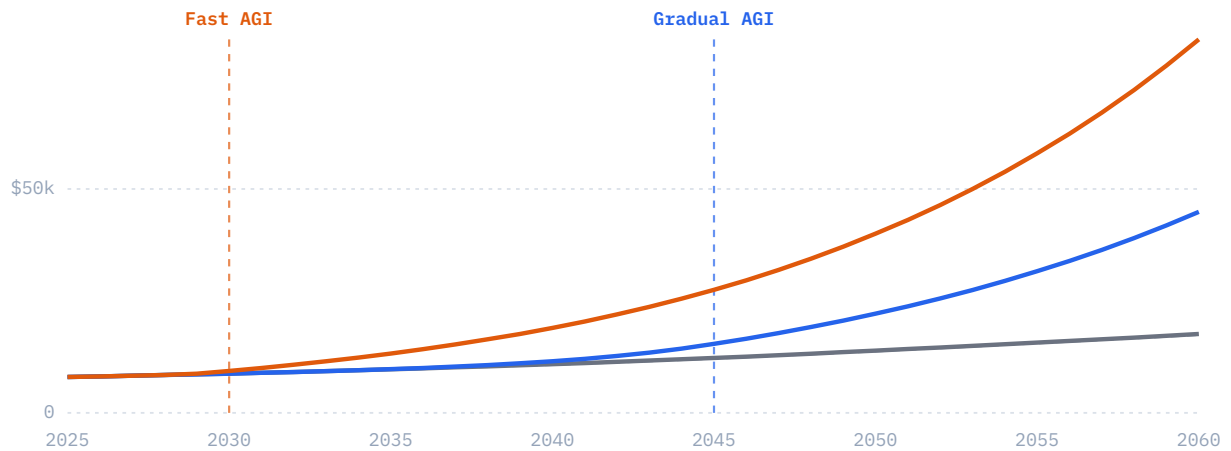
score 2 / 5 · weight 8 under skeptic → 12 under fast takeoff

AGI bet

Weight climbs from 8 to 12 as takeoff nears. It barely moves growth if AI stays ordinary — the lever that needs a view on the takeoff.

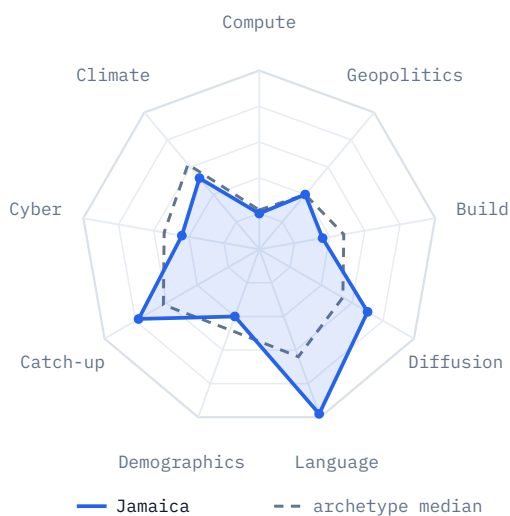
The no-regret levers pay off in every scenario, so a cautious government can act on them today. The AGI bets become decisive only if takeoff is real.

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: Jamaica. 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	1.8%	121 / 157	56.7	—
Gradual	6.5%	103 / 157	52.3	11 yrs
Fast	6.8%	98 / 157	46.5	10.5 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

Jamaica: 1.8% growth a year · #121 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

Jamaica: 6.5% growth a year · #103 of 157

Fast Erdil & Besiroglu, fast takeoff

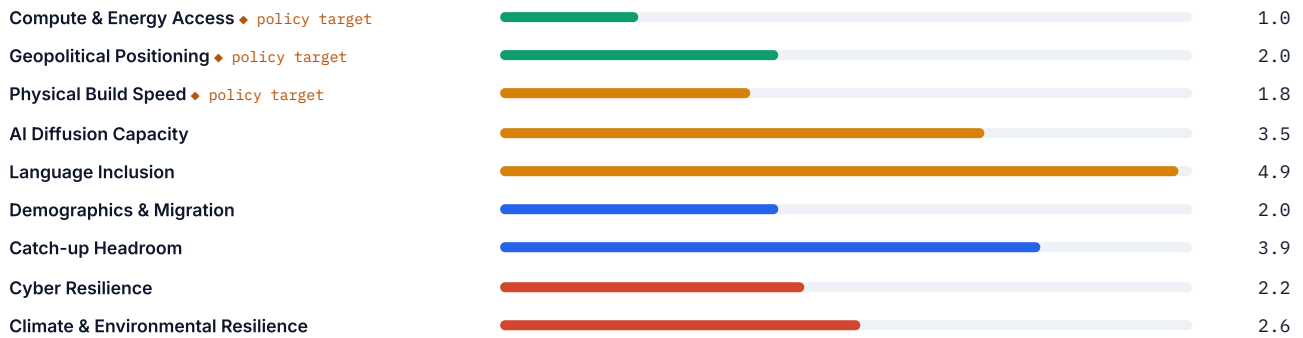
Fast takeoff — today's infrastructure decides

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

Jamaica: 6.8% growth a year · #98 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 — Small, open, service-led — exposed at both ends.

The Caribbean's economies are small, open and service-led: tourism and offshore finance in the Bahamas and Barbados, gas and petrochemicals in Trinidad & Tobago, services and diaspora ties in Jamaica. English proficiency and workable institutions help absorption, and an AGI-era boom in rich-country incomes would, if it comes, lift the tourism these economies sell. But nothing here changes the arithmetic of scale: no build story, hurricane exposure that climate change worsens, and gains that arrive as cheaper imported services rather than owned capability. Haiti is the region's hardest case and sits in the high-risk tier — state fragility, not technology, will decide its next twenty years. For the rest, the plausible path is steady, imported improvement: better tools, cheaper services, little leverage.

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