

Thailand

Archetype **Stalled middle**

GDP / person **\$8k**

Population **72M**

10-yr trend **2%**

Gradual **10%** · **#55**

Fast **16.1%** · **#44**

WHERE THAILAND STARTS

Thailand enters the AGI era as a stalled middle: middling income, middling scores, slow growth. At about \$8,057 GDP per person and ten-year trend growth of 2% a year, it neither leads nor breaks. The scores show a split personality. Physical build speed is 4.5 out of 5 — the Eastern Economic Corridor, the automotive plants that earned it the name Detroit of Asia, and deep industrial infrastructure. AI diffusion capacity is 4 and cyber resilience 4.2, both strong. What holds it back sits on the other side. Language inclusion is 1.2, because Thai is thinly covered by frontier models. Climate resilience is 1.4, exposed to flood and heat. Demographics score 1.9: Thailand is aging fast. Compute and energy access, at 2.2, is thin for its income.

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. Thailand would gain almost nothing: 2.2% growth a year, 108th of 157. Its build capacity would keep serving cars and electronics much as today. Under **Gradual** takeoff, growth would climb over two decades and reach 10% a year once AGI matures around 2045, lifting Thailand to 55th. The long runway would give its industry time to turn factories and infrastructure into new lines of work. An economy growing at 10% doubles in about seven years. Under **Fast** takeoff, growth would reach 16.1% a year from the early 2030s, a doubling every four to five years, and Thailand's rank would rise to 44th — up eleven places. A fast world rewards the build speed and diffusion Thailand already holds, even as it exposes the compute it lacks. Regulation and politics could slow or redirect any of these paths. How Thais 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, so 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.

Thailand's own signals would arrive earlier than the growth data: hyperscaler cloud-region commitments from AWS and Google on Thai soil, Board of Investment approvals for data centers in the Eastern Economic Corridor, and the order books of the automotive and electronics plants.

IF GROWTH GOES EXPLOSIVE

Explosive is relative. At 10% growth a year, Thailand would sit right at its region's median but trail the frontier badly, because the United States would be compounding at nearly twice that pace. Even so, 10% doubles the economy in about seven years, so a child starting school now would finish it in a country twice as rich. Electronics and services could grow around the car plants rather than lean on them. Thailand is aging, with no wave of workers abroad to call home, so the gain would show up as higher wages that keep more of its shrinking workforce in skilled jobs. There is a way this leaves Thailand worse off, and it is worth naming. Its computing runs on capacity it rents rather than owns, and its chips arrive under rules written in Washington and Beijing. Both can be repriced or restricted from outside. The hedge is to lock in firm compute and power contracts and to defend its neutral standing between the two technology spheres. Even then, the pace-setter would shift to the state, testing how fast the BOI, the EEC office, the grid planner EGAT and the courts can permit, connect and adjudicate.

WHAT THAILAND CAN DO NOW

Three levers follow from the scores, and two pay off whether or not AGI arrives. The first is climate and water resilience, low at 1.4. Flood and heat defense protects the economy under every scenario, and cooling and water are the very inputs any data-center build would need, so this is a no-regret move. The second is language inclusion, at 1.2. Funding Thai-language datasets and model partnerships, and widening second-language education, lifts diffusion whatever the AI weather — another no-regret step available today. The third lever is the bet. Compute and energy access, at 2.2, barely moves growth if AI stays ordinary, but under a fast takeoff it becomes Thailand's single biggest lever. Closing it means fast-tracking grid connections and new generation, and packaging power, land and quick permits to anchor hyperscale investment. Thailand can adapt a model from its own archetype: Mexico turned Querétaro into a fast-growing data-center cluster by concentrating power and land for cloud investors. A cautious government can act on the two no-regret levers now and lose nothing if the skeptics are right. Open the atlas's [policy editor](#) to see how moving these scores reshapes Thailand's path under each scenario.

The three levers — and which pay off regardless

Climate & water resilience

score 1.4 / 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

Language inclusion

score 1.2 / 5 · weight 7 under skeptic → 8 under fast takeoff

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

No-regret

Compute & energy access

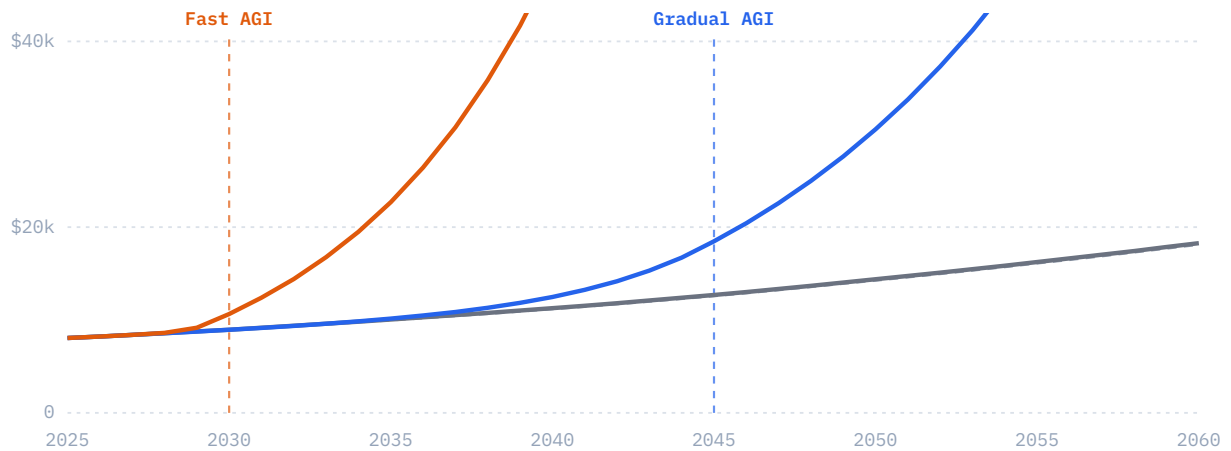
score 2.2 / 5 · weight 8 under skeptic → 24 under fast takeoff

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

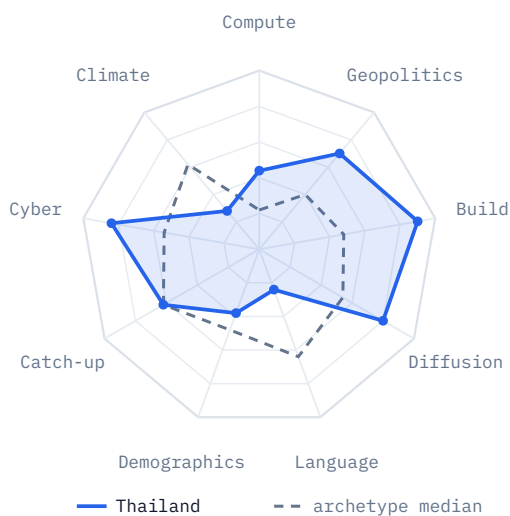
The no-regret levers pay off in every scenario, so a cautious government can act on them today. The AGI bet becomes decisive only if takeoff is real.

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: Thailand. 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%	108 / 157	61.5	—
Gradual	10%	55 / 157	59.9	7.3 yrs
Fast	16.1%	44 / 157	60.4	4.6 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

Thailand: 2.2% growth a year · #108 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

Thailand: 10% growth a year · #55 of 157

Fast Erdil & Besiroglu, fast takeoff

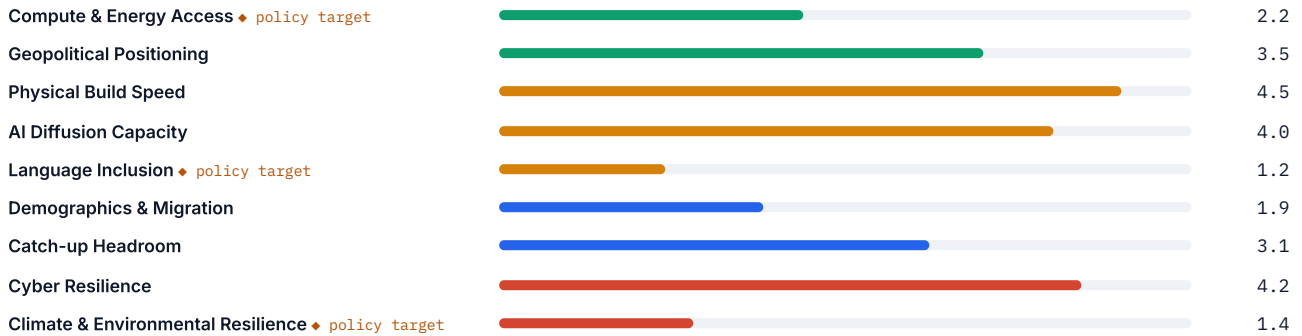
Fast takeoff — today's infrastructure decides

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

Thailand: 16.1% growth a year · #44 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	Slovakia 9.6% · #59	Argentina 9.5% · #61
Lithuania 9.3% · #63	Cabo Verde 9.3% · #64	Croatia 9.1% · #67	Nepal 9.1% · #68		

The regional picture — The build-out's second front.

This is the AI build-out's second front. Malaysia's Johor corridor has become one of the world's fastest-growing data-center clusters — overflow capacity for Singapore and inference for hire for everyone — and Singapore itself pairs the region's strongest institutions with a deliberate role as neutral ground between the American and Chinese technology spheres. That neutrality is the region's defining bet: most members buy Chinese infrastructure and use American or Chinese models as price and access dictate, and their room to keep doing both depends on the rivalry staying commercial rather than exclusionary. Vietnam, Indonesia and the Philippines pair young workforces with real construction momentum, and Thailand builds at scale while aging faster than it grows; these are also the countries whose export-manufacturing ladder a fast takeoff most directly threatens, because factory automation competes head-on with their cost advantage. Myanmar is cut off by conflict and sanctions; Timor-Leste is barely connected. Over twenty years the spread here could rival Europe's — Singapore near the top of the world table, Myanmar near the bottom.

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