CHINA CROSSROADS

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Catalyst or Catastrophe? How the AI Revolution Could Play Out in China's Economy

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China's forty-year growth model is running out of road. Property is broken, the population is aging fast, overcapacity is chronic, and export markets are closing. Beijing is betting that AI can fix all of this, with its AI Plus program promising to carry China into a "new stage of development" by 2035. But a productivity boom is not automatically a boom for workers. AI could lift output while wages, consumption, and the tax base stand still, leaving China with more capacity, too little demand, and an older population to pay for. This talk sets out three scenarios for the decade ahead: AI succeeds broadly, AI delivers the gains but households miss out, or AI simply disappoints. It also covers the signals that will show which one is unfolding, and what each would mean for the United States and the rest of the world.

Tom Nunlist is Associate Director and Head of Data Policy at Trivium China, a research and advisory firm that helps businesses and investors understand how China's policy environment shapes their markets. His expertise spans technology and geopolitics, with a focus on digital regulation and governance, artificial intelligence, and data security. His work supports multinationals, institutional investors, and other clients. He is also a frequent commentator on Beijing's digital strategy and tech regulation and holds a B.S. in Journalism from Northwestern University and studied at East China Normal University.

*China Crossroads hosts **talks** on all topics related to China, including business, foreign policy, and other areas as they relate to China, the idea being that China is both already a "crossroads" of the world and itself at a "crossroads" in terms of its future global influence. For more information, contact Frank Tsai at editor@shanghai-review.org.*