

Brunei

Archetype **Resource suppliers**

GDP / person **\$32k**

Population **0.47M**

10-yr trend **0.5%**

Gradual **5.2%** · **#124**

Fast **6.2%** · **#104**

WHERE BRUNEI STARTS

Brunei enters the AGI era as a resource supplier, a small and wealthy state that sells the build-out fuel. Oil and gas make up 77% of its exports. At about \$32,000 per person, it is high-income, but its economy is narrow. The scores show the shape. Demographics and migration score 4.5 out of 5, among the strongest anywhere, and AI diffusion capacity is 3.4, above the archetype norm. Its constraints are stark. Compute and energy access scores 1.1: Brunei has almost no data-center capacity. Catch-up headroom is also 1.1, because a rich country has little cheap ground to make up. Ten-year trend growth is just 0.5% a year. The Hengyi refinery on Pulau Muara Besar and the Wawasan Brunei 2035 plan mark the effort to diversify beyond Brunei Shell Petroleum.

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. Brunei would barely move: 0.6% growth a year, 148th of 157. Its narrow, fuel-based economy would drift near its current trend. Under **Gradual** takeoff, growth would build over two decades and reach 5.2% a year once AGI matures around 2045. That would lift Brunei to 124th. At that rate the economy doubles in about fourteen years. The gain would come from stronger world demand for the energy Brunei sells. Under **Fast** takeoff, growth would reach 6.2% a year from the early 2030s, a doubling in roughly twelve years, and Brunei would climb 20 places to 104th. A fast build-out would bid up fuel and power, giving a resource supplier a lift in its terms of trade — the price of its exports rising against its imports. But the rank stays low, because Brunei holds little of the compute a fast world rewards. Regulation and politics could slow or redirect any of these paths. How Bruneians and their leaders 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. So watch leading signals, not GDP, and check them live rather than trust any snapshot. Three global tells 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 point to a fast world. A point or two above trend by the mid-2030s would

point to a gradual one. A fade back to trend would point to a modest one. Brunei's own signals would arrive sooner than the GDP data: new long-term LNG and gas contracts, firm power or interconnection deals with the data-center clusters in Johor and Singapore, and the order books of the Hengyi petrochemical complex.

IF GROWTH GOES EXPLOSIVE

For Brunei, explosive is a relative term, and its rates are modest. Even under Fast takeoff, 6.2% growth a year sits far below the frontier's 39.2% and the region's median of 16.1%. Against the United States, compounding many times faster, Brunei would slip behind. Against its own flat history, it would still be a real gain: the economy would double in about twelve years, where today it barely grows. The mix would tilt further toward energy, as gas and power feed a hungry build-out and the terms of trade move in Brunei's favor. Its small workforce, already topped up by foreign labor, would see wages rise as demand grows. Here is the honest risk. A commodity boom is not a development plan. If the rents are banked and not converted into owned capacity and new industries, they evaporate when demand shifts, leaving Brunei a price-taker in another power's chip and energy order. The hedge is to turn rents into assets it controls. Even a windfall would test the state, from the Brunei Investment Agency's allocation choices to the pace of permitting and a small civil service asked to steer a fast transition.

WHAT BRUNEI CAN DO NOW

Three levers follow from the scores, and two pay off whether or not AGI arrives. Start with the no-regret moves. The first is catch-up headroom, at 1.1. Stronger institutions, clearer property rights and more openness to trade, foreign investment and technology transfer would raise growth under every scenario, and cost nothing if the skeptics are right. The second is physical build speed, at 2.4. Faster permitting, pre-zoned industrial land and transmission built ahead of demand help under any path. The third lever is the bet. Compute and energy access, at 1.1, barely moves growth if AI stays ordinary, but under a fast takeoff it becomes Brunei's biggest lever. Brunei has cheap gas; the task is to package power, land and quick approvals to draw data-center investment, alongside partner co-investment. Brunei can adapt a peer's move: Chile's National Lithium Strategy keeps the state a stakeholder and pushes the country up the value chain rather than exporting raw material. A cautious government can act on the two no-regret levers today and lose nothing. Open the atlas's [policy editor](#) to see how shifting these scores changes Brunei's path under each scenario.

The three levers — and which pay off regardless

Catch-up headroom

score 1.1 / 5 · weight 16 under skeptic → 6 under fast takeoff

Counts under the Modest scenario too (16→6). 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

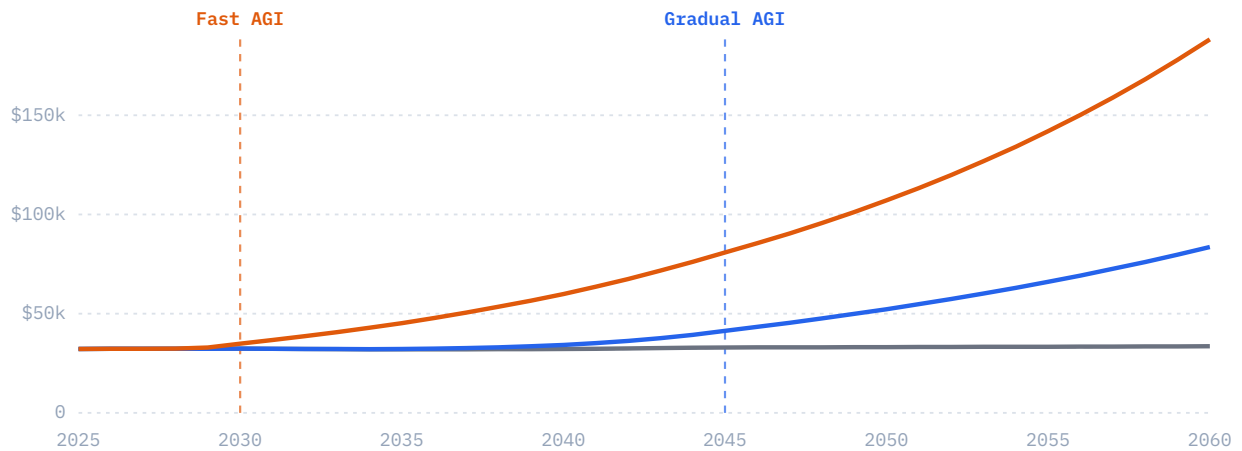
score 2.4 / 5 · weight 8 under skeptic → 17 under fast takeoff

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

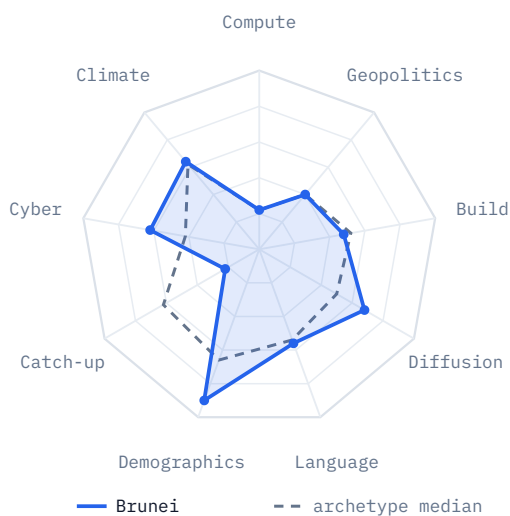
The no-regret levers pay off in every scenario, so a cautious government can act on them today. The AGI bets become decisive only if takeoff is real.

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: Brunei. 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	0.6%	148 / 157	54.1	—
Gradual	5.2%	124 / 157	51.2	13.7 yrs
Fast	6.2%	104 / 157	47.1	11.5 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

Brunei: 0.6% growth a year · #148 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

Brunei: 5.2% growth a year · #124 of 157

Fast Erdil & Besiroglu, fast takeoff

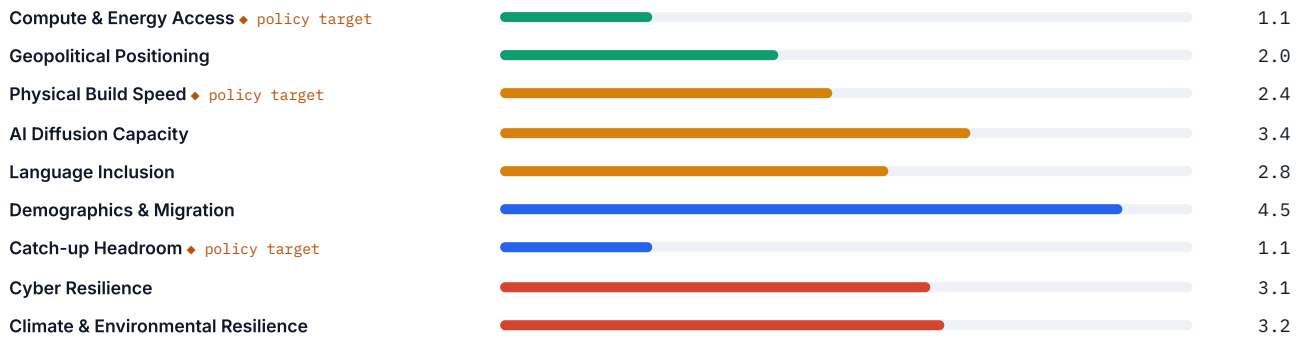
Fast takeoff — today's infrastructure decides

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

Brunei: 6.2% growth a year · #104 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: Resource suppliers

They sell the build-out its inputs — copper, fuels, bauxite, iron ore, uranium.

Wins: The physical build-out — the one lower-income group with terms-of-trade upside under fast takeoff.

Watch: A commodity boom is not a development strategy; the rents must be converted or they evaporate.

Chile 14% · #19

Colombia 12.1% · #36

Peru 11.1% · #42

Kazakhstan 9.7% · #58

Mongolia 8.5% · #77

Tajikistan 7.4% · #93

Zambia 6.6% · #100

Guinea 6.2% · #107

Algeria 6.1% · #108

Kuwait 6% · #111

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