

Djibouti

Archetype **Reform climbers**

GDP / person **\$4k**

Population **1.18M**

10-yr trend **5.5%**

Gradual **7.6%** · **#88**

Fast **5.8%** · **#111**

WHERE DJIBOUTI STARTS

Djibouti enters the AGI era as a Reform climber — a country growing steadily from a low base while its institutions improve. Its distinguishing scores are demographic and catch-up strength: Demographics and Migration is 4.9 out of 5, near the top of the table, and Catch-up Headroom is 4. A young workforce and a long way still to grow are real assets. Language Inclusion is 3.7, helped by French and Arabic. Those strengths sit atop a narrow economy built on location: the Doraleh container terminal, the Port of Djibouti, the subsea cables landing on its coast, and its role as landlocked Ethiopia's main trade gateway. The constraints are physical. Compute and Energy Access scores 1.1, Cyber Resilience 1.4, Climate Resilience 1.4. Ten-year trend growth is 5.5% a year. At about \$3,906 per person, Djibouti is lower-middle-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. Djibouti's climb would continue at 5.6% growth a year. Because most economies barely move in this world, that ranks 16th of 157. Its ports, cables and Ethiopian transit trade would keep driving the result. Under **Gradual** takeoff, growth would rise over two decades and reach 7.6% a year once AGI matures around 2045, doubling the economy in under ten years. Yet Djibouti's rank would fall to 88th, as faster-adjusting economies pull ahead. Under **Fast** takeoff, growth would reach 5.8% a year from the early 2030s, barely above trend, and its rank would slip to 111th. A fast world rewards the compute, capital and chip access Djibouti does not hold. Momentum helps it most when the world has time to adjust. Politics could slow or redirect any path. How Djiboutians 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 watch 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. Djibouti's own signals would arrive earlier than the growth data: new

subsea cable landings and financial close on data-center projects, cloud or hyperscaler hosting commitments on Djiboutian soil, throughput at Doraleh, and the power it draws from Ethiopia's grid.

IF GROWTH GOES EXPLOSIVE

Explosive is the wrong word for Djibouti's numbers. Even under Gradual takeoff, 7.6% growth a year would double the economy in under a decade — brisk by its own history, but far behind a frontier compounding at nearly 20%. Under Fast takeoff, 5.8% barely clears trend while the frontier races at close to 40%. So the story is catch-up at home and relative decline against the leaders, though Djibouti stays above its region's median in every scenario. At the gradual pace, a child born today would enter the workforce in an economy more than twice its current size. Its young population would find more work at home, and rising wages could ease the pressure to emigrate for jobs in the Gulf. There is a way this leaves Djibouti worse off. Its economy runs on labor-intensive port and logistics work, the very rungs automation reprices first. And hosted cables and data centers are assets only if Djibouti owns them rather than rents them; capacity financed and controlled abroad can be throttled or repriced elsewhere. The hedge is to own capacity and climb the value chain. Even then, the pace-setter would move to the state, testing how fast the Ports and Free Zones Authority, customs and the energy ministry can permit, adjudicate and count.

WHAT DJIBOUTI CAN DO NOW

Three levers follow from the scores, and two pay off whether or not AGI arrives. The first no-regret move is AI Diffusion Capacity, low at 1.7. Digital skills, deployment-friendly rules and digitized government services raise productivity in the skeptic's world and every other one. The second no-regret move is Physical Build Speed, at 2. Statutory permitting deadlines, one-stop approvals, pre-zoned land and transmission built ahead of demand help under every scenario, and they are what any energy or data-center project needs first. A cautious government can act on both today and lose nothing if the skeptics are right. The third lever is the bet. Compute and Energy Access, at 1.1, is Djibouti's weakest high-weight factor; it barely moves growth if AI stays ordinary but becomes the single biggest lever under a fast takeoff. Closing it means packaging power, land and the country's cable landings to anchor data-center investment, and securing chip access through partners. A \$3,906-per-person economy cannot fund that alone, so it needs co-investment. Djibouti can adapt a model from its archetype: Rwanda built its climb on digitized government through the Irengo platform and Kigali's innovation push. To see how moving any of these scores changes Djibouti's path under each scenario, open the atlas's [policy editor](#).

The three levers — and which pay off regardless

AI diffusion capacity

score 1.7 / 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

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

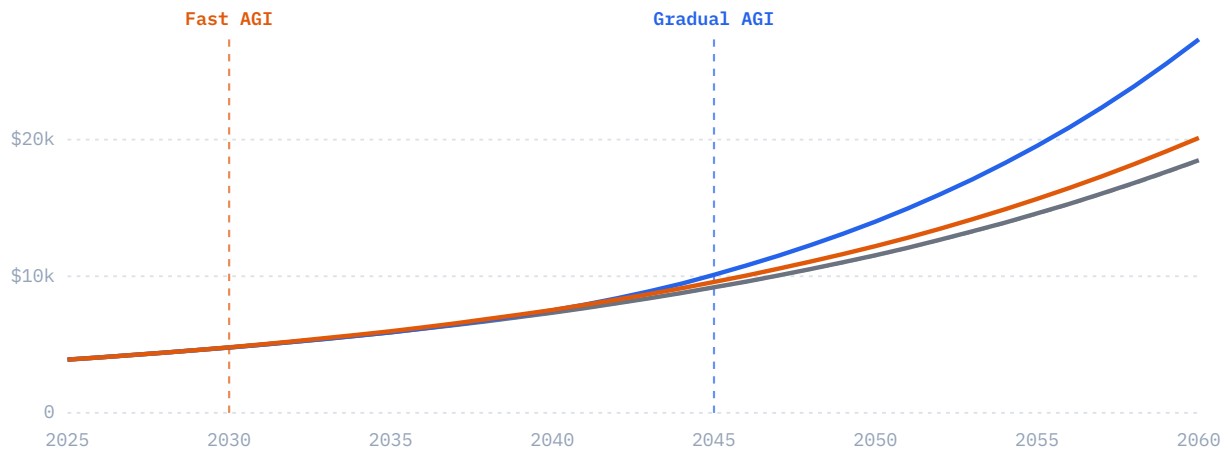
score 2 / 5 · weight 8 under skeptic → 17 under fast takeoff

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

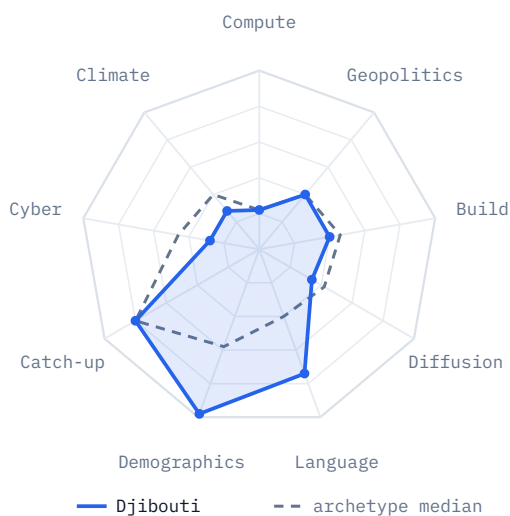
The no-regret levers pay off in every scenario, so a cautious government can act on them today. The AGI bets become decisive only if takeoff is real.

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: Djibouti. 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	5.6%	16 / 157	50.8	12.7 yrs
Gradual	7.6%	88 / 157	48	9.5 yrs
Fast	5.8%	111 / 157	41.8	12.3 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

Djibouti: 5.6% growth a year · #16 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

Djibouti: 7.6% growth a year · #88 of 157

Fast Erdil & Besiroglu, fast takeoff

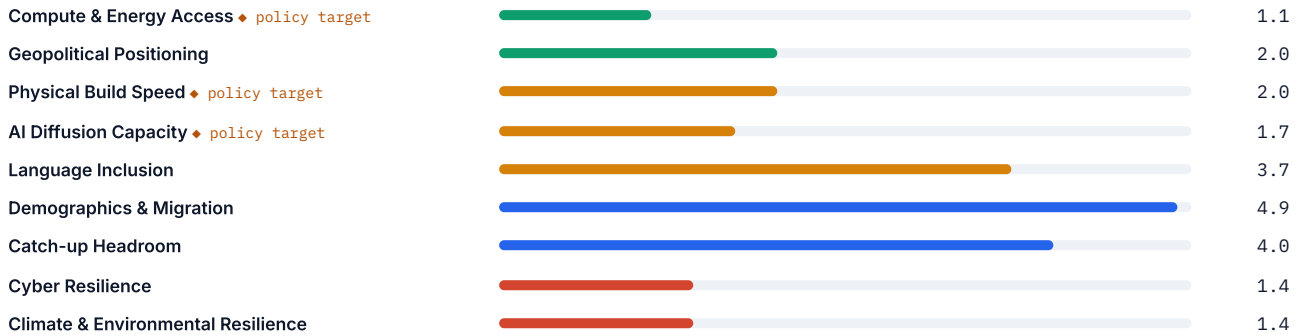
Fast takeoff — today's infrastructure decides

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

Djibouti: 5.8% growth a year · #111 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: Reform climbers

Actually climbing: sustained growth from a low base, with improving institutions.

Wins: The gradual world, where two decades of adjustment time reward momentum.

Watch: The climb runs through the very labor-intensive rungs automation removes.

Dominican Republic **10.6%** · #47

Senegal **9.6%** · #60

Kyrgyzstan **9%** · #70

Rwanda **8.9%** · #72

Laos **8.2%** · #81

Georgia **8%** · #84

Côte d'Ivoire **7.6%** · #87

Kosovo **7.4%** · #91

Ghana **7.4%** · #92

Benin **7.2%** · #97

The regional picture — The framework's hardest conclusion.

Sub-Saharan Africa scores lowest of any region, and it is the only one that does better under a slow takeoff than a fast one — speed rewards the compute, capital and geopolitical assets it lacks most. The physical gap is stark: roughly 600 million people without electricity and under 1% of global data-center capacity, set against the world's fastest-growing workforce — Nigeria alone adds more than Germany's entire population by 2045 in the projections used here. Forty countries are not one story. South Africa and Kenya lead with real digital economies; Senegal, Ghana and Côte d'Ivoire absorb selectively; Nigeria and Ethiopia carry the demographic weight and the dividend trap — the young workforce that was the region's asset is the input AI substitutes for. Nine states, from the Sahel juntas to DR Congo and Zimbabwe, sit in the high-risk tier, where state capacity binds before technology does. The mobile-money precedent shows leapfrogging is possible; the compute data shows it has not yet happened at any scale that matters. Given AGI on any timeline, closing the power, connectivity and device gap is the single highest-leverage move on this map — and the twenty-year window before full automation is the time in which it is still cheap to do.

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