

Tunisia

Archetype **Stalled middle**

GDP / person **\$5k**

Population **12M**

10-yr trend **0.9%**

Gradual **5%** · **#130**

Fast **5.7%** · **#112**

WHERE TUNISIA STARTS

Tunisia is a stalled middle: middling income, middling scores, slow growth. Ten-year trend growth is just 0.9% a year, and the gap to faster economies widens with time. Its strengths are human and institutional, not physical. Catch-up headroom and geopolitical positioning both score 3.5, cyber resilience 3.2, and AI diffusion capacity 3.1 — the last built on strong engineering schools that supply offshoring work for French and European firms. The constraints are hard. Compute and energy access scores 1, near the bottom, because Tunisia has almost no data-center capacity. Physical build speed is 1.8 and climate and water resilience 1.6. At about \$4,657 per person, Tunisia is lower-middle-income, and the capital to fix the physical gaps is scarce. Its manufacturing base — wiring harnesses, aerospace parts, textiles — is the main export earner.

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. Tunisia would edge up to 1% growth a year, 143rd of 157, barely above trend and near the bottom of the table. Under **Gradual** takeoff, growth would build over two decades and reach 5% a year once AGI matures around 2045. That would lift Tunisia to 130th, and an economy growing at 5% doubles in about fourteen years. Under **Fast** takeoff, growth would reach 5.7% a year from the early 2030s, a doubling roughly every twelve to thirteen years. Tunisia would climb 18 places to 112th, because a fast world rewards even a partial build-out of compute and diffusion. But these are modest rates by world standards in every case. Politics could slow or redirect any of these paths. How Tunisians 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. 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 would signal a gradual one. A fade back

to trend would signal a modest one. Tunisia's own signals would arrive first: financial close on the Elmed power cable to Italy, any hyperscaler hosting commitment on Tunisian soil, the order books of the automotive and aerospace plants, and whether engineering graduates stay or leave.

IF GROWTH GOES EXPLOSIVE

For Tunisia, explosive is the wrong word. Even under Fast takeoff, 5.7% growth a year is modest. The frontier would compound near 39% and the regional median near 16%, so Tunisia would fall further behind both. This is the stalled-middle risk: the gap to faster economies compounds year by year. Still, the change from today would be real. At 5% growth the economy doubles in about fourteen years, so a child starting school now would finish it in a country roughly twice as rich. Higher wages at home would ease the pressure on engineers and graduates to emigrate for work. The honest downside is dependence. If Tunisia rents its computing power rather than owning it, prices and access are set abroad, and a rule-taker inside another power's chip regime has little say. Brain drain is the sharper threat: talent can leave faster than capacity is built. The hedge is to build owned capacity and keep skilled people at home. Even a modest build would test the state — STEG's ability to add generation, the speed of permitting, and the ministries that must approve projects and count the results.

WHAT TUNISIA CAN DO NOW

Three levers follow from the scores, and two pay off whether or not AGI arrives. The first is AI diffusion capacity, at 3.1 already Tunisia's relative strength. Digital skills, permissive deployment rules and digital government carry weight even in the skeptic's world, so protecting and extending this is a no-regret move. The second is physical build speed, low at 1.8. Statutory permitting deadlines, one-stop approvals and pre-zoned land with transmission built ahead of demand help the economy under every scenario, and they are what any later data-center build would need — also no-regret. 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 Tunisia's single biggest lever. Closing it means offering power and land packages to anchor investment, which a \$4,657-per-person economy cannot fund alone. Tunisia can copy a working model: Thailand drew multibillion-dollar cloud investment from AWS and Google by pairing incentives with power. A cautious government can act on the two no-regret levers today and lose nothing. Open the atlas's [policy editor](#) to see how moving these scores reshapes each path.

The three levers — and which pay off regardless

AI diffusion capacity

score 3.1 / 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 / 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

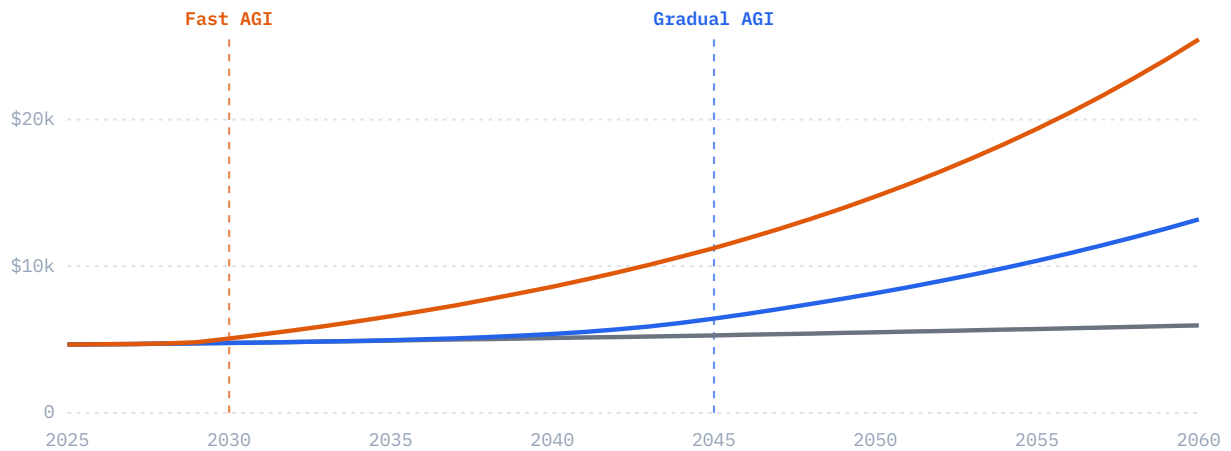
score 1.8 / 5 · weight 8 under skeptic → 17 under fast takeoff

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

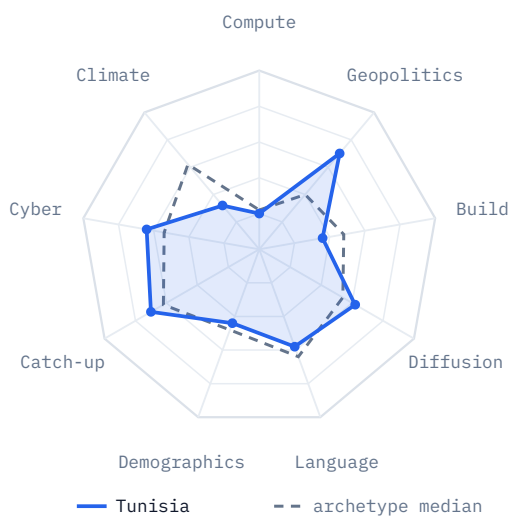
The no-regret levers pay off in every scenario, so a cautious government can act on them today. The AGI bets become decisive only if takeoff is real.

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: Tunisia. 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%	143 / 157	53.8	—
Gradual	5%	130 / 157	49.9	14.2 yrs
Fast	5.7%	112 / 157	45.6	12.5 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

Tunisia: 1% growth a year · #143 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

Tunisia: 5% growth a year · #130 of 157

Fast Erdil & Besiroglu, fast takeoff

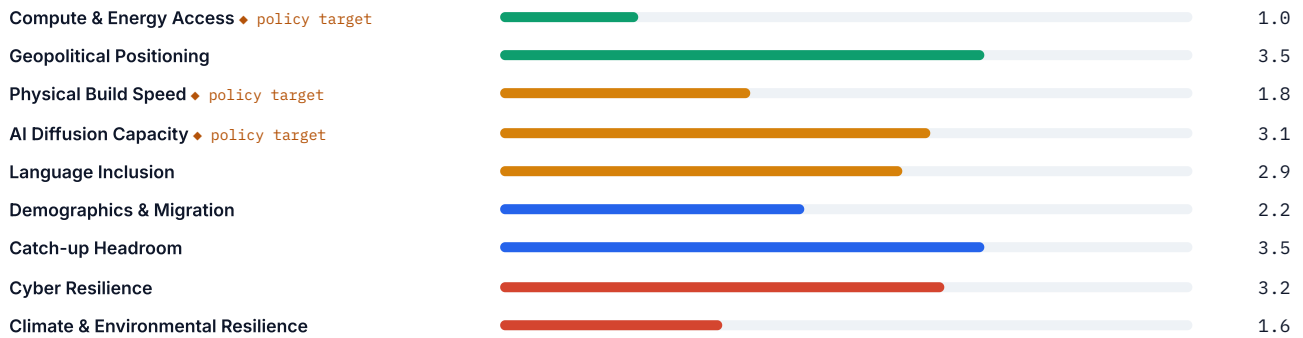
Fast takeoff — today's infrastructure decides

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

Tunisia: 5.7% growth a year · #112 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 — Petro-capital pours into compute.

The Gulf is running the clearest experiment in buying a place in the AI economy. Sovereign capital converts hydrocarbons into compute: the UAE and Saudi Arabia have secured government-to-government chip-access agreements and anchor announced build-outs far beyond their economic size, and the UAE posts the world's highest measured AI adoption — about 70% of its working-age population in Microsoft's 2026 data. The dependency is explicit: those agreements, not geography, connect Gulf capital to frontier silicon, and they are revocable at each turn of American politics. The physical constraint is just as explicit: more than 180 days a year above 35°C makes cooling the binding input and water the scarcest one. Israel supplies the region's frontier R&D; Morocco builds steadily at Atlantic temperatures and positions itself as Europe's southern energy partner; Egypt has the population without the complements; Iraq pairs oil with the region's weakest institutions. The twenty-year test of the Gulf model is whether bought compute becomes owned capability — or remains a well-provisioned tenancy.

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