

Vietnam

Archetype **Conditional demographic giants**

GDP / person **\$5k**

Population **102M**

10-yr trend **6.2%**

Gradual **13.3%** · **#23**

Fast **18.1%** · **#36**

WHERE VIETNAM STARTS

Vietnam is one of the AGI era's conditional demographic giants: countries whose scale and youth become an asset only if power, connectivity and capital arrive in time. The scores show both sides. Physical build speed is 4.9 out of 5, near the top of the table — home to Samsung's largest phone factories, Intel's assembly plant, and a manufacturing base that makes up about 85% of exports. Demographics score 4.4 and cyber resilience 4.4. AI diffusion capacity, at 3.5, is already strong for the income level. What holds Vietnam back is compute and energy access, at 1.7, after northern power shortages forced factory shutdowns in 2023. Geopolitical positioning scores 2, the price of balancing between Washington and Beijing. At about \$5,066 per person, Vietnam is lower-middle-income, and ten-year trend growth of 6.2% a year is already among the world's fastest.

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. Vietnam would grow at 6.5% growth a year, 5th of 157. Because its trend growth is already high, it ranks near the top without any AGI lift. That pace doubles the economy in about eleven years. Under **Gradual** takeoff, growth would climb over two decades and reach 13.3% a year once AGI matures around 2045, ranking 23rd. An economy growing at 13.3% doubles in under six years. The long runway would give Vietnam time to turn its young workforce and construction momentum into higher-value work. Under **Fast** takeoff, growth would reach 18.1% a year from the early 2030s, a doubling every four years or so. Yet Vietnam's rank would slip to 36th, down thirteen places, because a fast world rewards the compute and chip access it does not yet hold. Regulation and politics could slow or redirect any path. How Vietnamese citizens 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 identical until about 2030. 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. Vietnam's own signals would arrive earlier than the growth data: hyperscaler or chipmaker commitments on Vietnamese soil, financial close on the power plants and grid links in the national power plan, and the order books of the Samsung and Intel supply chains.

IF GROWTH GOES EXPLOSIVE

Explosive is relative. At 13.3% growth a year, Vietnam would still trail the frontier, because the United States would be compounding at 19.5%. But it would run ahead of its region, whose middle grows at 10% in that world. The economy would double in under six years, so a child starting school now would finish it in a country several times richer. Electronics and services would climb the value chain, and rising labor demand would lift wages, easing the pressure on young Vietnamese to emigrate for work. There is a way this leaves Vietnam worse off. It rents its computing power rather than owning it, and it sits as a rule-taker between two chip regimes. Data centers financed and licensed abroad can be throttled or repriced in Washington or Beijing, and the geopolitics score of 2 measures how little room Vietnam has to push back. The hedge is to own capacity, not just host it, and to widen its trusted-partner options. Even then, the pace-setter would move from the factory floor to the state, testing how fast EVN can build the grid, how fast provinces can permit, and how fast Hanoi's ministries can plan.

WHAT VIETNAM CAN DO NOW

Three levers follow from the scores, and one pays off whether or not AGI arrives. The no-regret lever is AI diffusion, already a relative strength at 3.5. Digital skills, permissive deployment rules and digitized government carry real weight even in the skeptic's world, so building on this strength loses nothing if AGI never comes. The second lever is the big bet: compute and energy access, at 1.7 and the country's heaviest-weighted factor. It barely moves growth if AI stays ordinary, but under a fast takeoff it becomes Vietnam's largest lever. Closing it means fast-tracking new generation and grid links and packaging power and land to anchor hyperscale investment. The third lever is geopolitical positioning, at 2: deepening ties with chip-supplying blocs while keeping access to capital and to both American and Chinese models. A \$5,066-per-person economy cannot fund the compute build alone. Vietnam can adapt a model from its archetype: India secured Micron's semiconductor assembly and test plant in Gujarat with state co-funding. A cautious government can act on the diffusion lever today at no loss. Open the atlas's [policy editor](#) to see how moving these scores reshapes Vietnam's path under each scenario.

The three levers — and which pay off regardless

AI diffusion capacity

score 3.5 / 5 · weight 24 under skeptic → 13 under fast takeoff

Already a strength, and it carries weight in every scenario (24→13). Protecting it pays off whether or not AGI arrives.

No-regret

Compute & energy access

score 1.7 / 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

Trusted chip & tech access

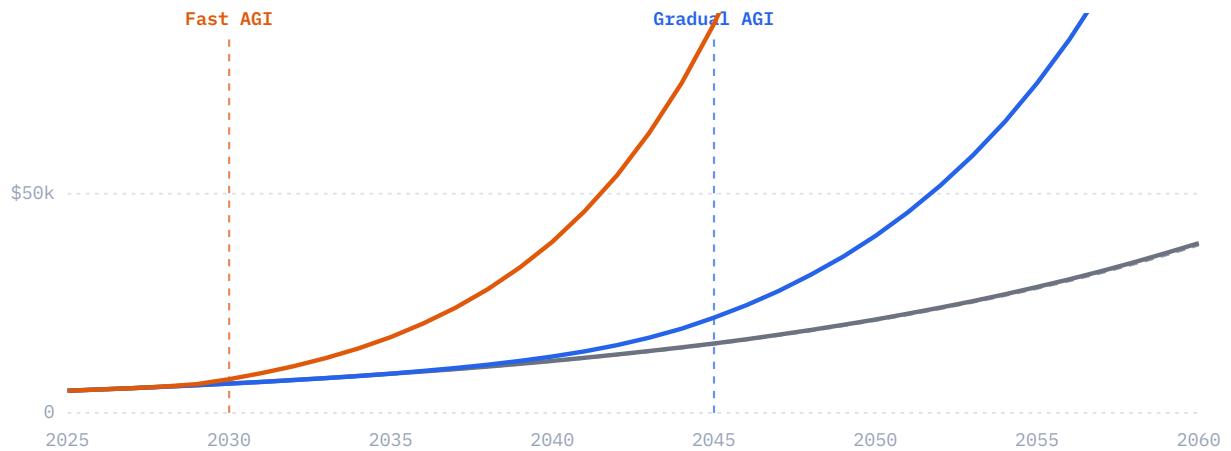
score 2 / 5 · weight 8 under skeptic → 12 under fast takeoff

Weight climbs from 8 to 12 as takeoff nears. It barely moves growth if AI stays ordinary — the lever that needs a view on the takeoff.

AGI bet

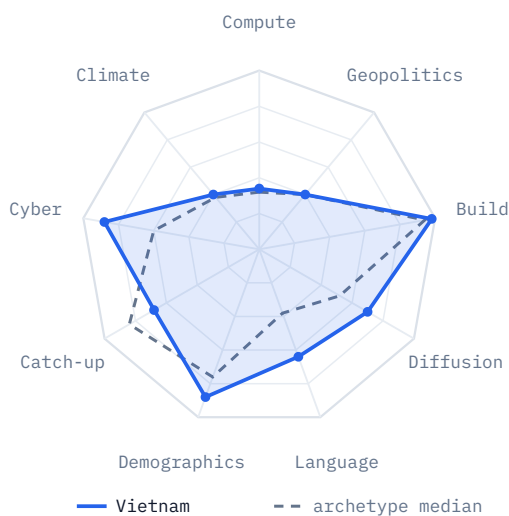
The no-regret levers pay off in every scenario, so a cautious government can act on them today. The AGI bets become decisive only if takeoff is real.

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: Vietnam. 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	6.5%	5 / 157	67.6	11 yrs
Gradual	13.3%	23 / 157	64.2	5.6 yrs
Fast	18.1%	36 / 157	62.2	4.2 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

Vietnam: 6.5% growth a year · #5 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

Vietnam: 13.3% growth a year · #23 of 157

Fast Erdil & Besiroglu, fast takeoff

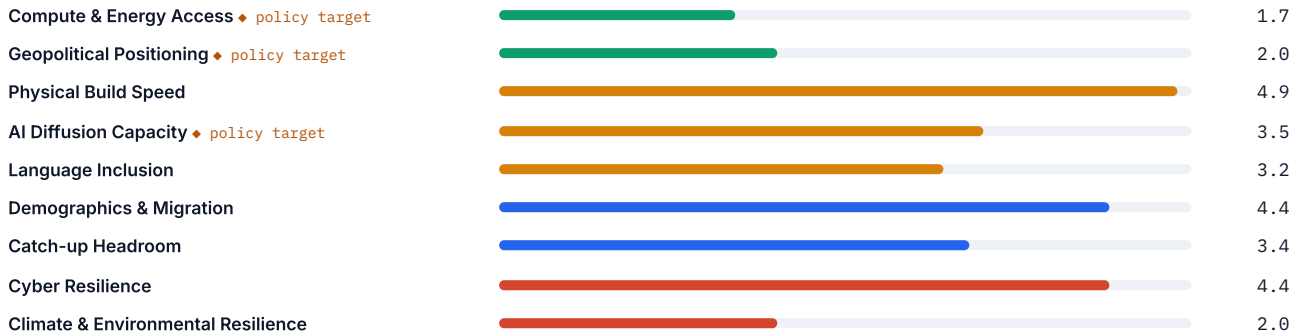
Fast takeoff — today's infrastructure decides

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

Vietnam: 18.1% growth a year · #36 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: Conditional demographic giants

Scale and youth are the asset — if power, connectivity and capital arrive in time. Every member is already climbing, or has its demographic dividend still ahead.

Wins: Mid-to-late, and only conditionally.

Watch: The dividend is the very labor AI substitutes for; the export ladder can be kicked away.

India **14.7%** · #16

Philippines **13%** · #29

Indonesia **12.4%** · #35

Uzbekistan **11%** · #44

Kenya **10.3%** · #51

Bangladesh **10.3%** · #52

Egypt **10.2%** · #53

Tanzania **9.4%** · #62

Ethiopia **8.6%** · #76

Uganda **7.6%** · #86

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