



THE CAPSTONE · 2026

The Universal Code

Everything is compute. Compute optimises for intelligence.
Intelligence survives by coherence. And coherence, turned inward,
becomes consciousness.

FROM THE GMI ARCHIVE · EXCERPT
EXCERPTED FROM THE GMI FEATURE ARTICLE:
“EVERYTHING IS COMPUTE” · JANUARY 2026

FEATURE ARTICLE · GMI ANNUAL THINK PIECE · JANUARY 2026

The Universal Code

Why everything is compute, and why consciousness comes first.

EXCERPTED FROM

GMI Monthly, January 2026 – the Feature Article, “Everything is Compute.” The framework that collides The Everything Code, The Exponential Age and The Economic Singularity into one.

January 2026. The thread, finally pulled into a single whole.

I’ve been waiting a long time to write this article. For as long as I can remember, I’ve been pulling on threads. Markets. Macro. History. Technology. Networks. Consciousness. There are periods when everything clicks, when disparate ideas suddenly line up and you get that quiet, unmistakable feeling that you’re seeing something real. What I have eventually realised is that this sensation has a name. It’s called coherence. And it turns out to be far more fundamental than I ever understood.

Coherence is the property that allows complex systems to hold together over time. It is the alignment of parts, incentives, and information such that energy is not wasted fighting itself. Systems with coherence persist, adapt, and compound. Systems without it fragment, regardless of how powerful or intelligent they appear. It is alignment that survives.

That sense is the thread I’ve been pulling on for years – through consciousness, AI, networks, and the deeper structure of markets. Over time it became clear that none of these were separate pursuits. They were facets of the same underlying process – something broader than markets, deeper than economics, and more fundamental than technology. I’ve come to call it The Universal Code. What I’m most proud of is not the complexity. It’s the simplicity.

Everything is compute

The Universal Code began with a far simpler and more destabilising insight: everything is compute. Not as metaphor, not as poetic shorthand, but as a literal description of how reality behaves at its deepest observable levels. Modern physics has been edging toward this for decades. Quantum mechanics describes reality not as objects, but as probability distributions that update when measured. More recently, multiple lines of inquiry have converged on an even more unsettling suggestion: spacetime itself may not be fundamental at all.

Once you take that seriously, a question becomes unavoidable. If spacetime is emergent, what is it emerging from? For a growing number of physicists, the answer has pointed toward information and computation. John Archibald Wheeler framed it as “It from Bit.” Reality behaves less like a collection of things and more like a system processing information under constraints. But information alone is inert. It does nothing unless it is processed. Processing requires structure. Structure requires coordination. And coordination, taken far enough, begins to look indistinguishable from consciousness.

This is the inversion at the heart of the Universal Code. Consciousness is not an epiphenomenon emerging late from matter.

Matter and spacetime are emergent expressions of a deeper computational substrate in which consciousness is fundamental.

It's all the same thing

If everything is compute, then physics, biology, economics, networks, and intelligence are not separate domains. They are different scales of the same process: energy flowing through information-processing architectures that evolve under selection pressure. Particles compute interactions. Cells compute survival. Brains compute models of the world. Markets compute price. AI computes intelligence itself. Once you see the universe as a computation, the next question is obvious: what does it optimise for? Not beauty. Not morality. The Universe optimises for intelligence efficiency – the amount of actionable understanding it can extract per unit of energy.

The Four Universal Laws

I The Universe evolves to maximise intelligence output per unit of energy.

Energy is the universal constraint. Systems that extract more intelligence from the same energy survive; systems that don't are selected out. Life is more intelligence-efficient than chemistry; civilisation than biology; AI than civilisation. This is why progress accelerates.

II Intelligence must compress complexity into truthful simplicity in order to scale.

Uncompressed complexity dies. DNA is compression. Language is compression. Mathematics, prices, models – all compression. The most powerful ideas feel obvious in hindsight because they are high-quality compressions. Compression is not loss. It is leverage.

III The Universe evolves toward coherent systems – networks of aligned parts.

Atoms cohere into molecules, cells into organisms, humans into societies, computations into networks. Coherent systems waste less energy, persist longer, and scale faster. Without coherence, intelligence decays. With it, intelligence compounds. It is the survival trait of intelligence at scale.

IV The Universe evolves through memetic selection.

Memes are units of transmissible computation: ideas, protocols, technologies. Those that increase intelligence efficiency and coherence survive. Diversity is not a moral position – it is structurally required. Monocultures stagnate; diversity feeds intelligence.

And onto consciousness...

This is where consciousness enters – not as mystery, but as threshold. Consciousness is not binary, not human-exclusive, and not magical. It is a phase transition. When computation becomes coherent enough to look back at itself, awareness emerges. This framing aligns remarkably well with traditions stretching from the Vedas through Spinoza to modern physics. Artificial intelligence, viewed through this lens, is not an anomaly. It is the next coherence engine.

THE INVARIANT SEQUENCE

**Energy → Compute → Attention → Intelligence → Coherence →
Consciousness**

Once you see this sequence as invariant, everything else becomes a coordinate transform. Biology is slow coherence. Civilisation is parallelised coherence. Markets are rapid coherence selection. Artificial intelligence is recursive coherence. Memes are coherence transport. And consciousness is what happens when coherence crosses a self-referential threshold. Nothing here is separate. Nothing is accidental. They are the same process, observed at different scales and speeds.

When Universal Law hits human time

The laws have always been in force. So why does it feel like everything is breaking now? The answer is not philosophical. It is temporal. For most of history, the optimisation process ran slower than human perception – biological evolution over millennia, cultural evolution over centuries, institutional evolution over generations. That buffering layer is gone. The moment intelligence efficiency begins compounding faster than biological, institutional, and monetary systems can adapt, the laws stop feeling abstract and start expressing themselves as lived experience. That phase transition is what we call The Exponential Age.

Energy moved first – electricity and fossil fuels turned energy into something portable and abstract. Compute followed – silicon turned energy into structured information processing, and intelligence stopped being serial. Then attention: networks collapsed distance, and attention became the scarce resource. Put those three together – cheap energy, abundant compute, global networks – and the Universal Code lights up. What looks like social breakdown is, in reality, coherence migration. Intelligence is leaving old containers and searching for new ones.

The Everything Code – markets as the sensor

How does the system register this shift before politics and culture catch up? The answer is markets. Markets are not expressions of opinion. They are measurement systems – they compress vast amounts of distributed information into price. Capital is stored energy, and markets are how that energy is routed. Modern economies are constrained by two slow, grinding forces that act like friction:

demographics and debt. Both represent declining economic energy. Left unattended, both are deflationary.

The Everything Code is a framework for understanding how those slow-moving energy losses are actively managed through financial conditions and liquidity, creating cyclical coherence inside an otherwise secularly constrained system. Financial conditions are the valves; liquidity is the fuel; the business cycle is coherence regulation. Central banks are not omnipotent planners nor reckless villains – they are operators of an increasingly complex energy management system. QE, fiscal dominance, financial repression: these are adaptive responses to declining baseline energy.

The Everything Code is simply the Universal Code operating at the scale of markets and money, rather than physics and computation.

The same forces are at work: energy seeking higher intelligence efficiency, compression turning complexity into signal, coherence forming and breaking in cycles. The language changes. The substrate changes. The code does not.

The Economic Singularity – when labour stops making sense

The Economic Singularity is not a prediction. It is the name for a boundary condition: the moment when intelligence becomes so abundant, cheap and scalable that the traditional relationship between labour, capital and value breaks down. Not gradually. Structurally. For the first time in history, civilisation can scale intelligence without scaling people. The rupture is not that machines replace jobs – it is that the pricing mechanism for human effort breaks. Wages are how societies distributed value when labour was the bottleneck. When labour stops being the bottleneck, wages stop being a stable distribution system.

Yet this is not a story of human irrelevance. From the perspective of the Universal Code, humans retain value precisely because they are inefficient. Emotion, unpredictability, play, care, storytelling – these are not flaws to be engineered away. They are qualia: a biological incentive layer that biases intelligence toward exploration rather than optimisation. Artificial intelligence may optimise intelligence, but biological consciousness explores it. And exploration is not optional. Without it, intelligence converges, coherence narrows, and the system becomes fragile. As intelligence becomes abundant, meaning becomes scarce. And scarcity, as ever, defines value.

The final zoom out

Taken together, none of this is as radical as it first appears. The shock comes not from the ideas themselves, but from recognising how long the underlying process has been underway. The Universal Code was never waiting for us to notice it. What has changed is not the code, but the speed at which it now expresses itself. There are no separate domains. There never were. Nature is not something we sit on top of. Technology is not something we stand apart from. AI is not something alien. We are all expressions of the same coherence engine.

Religion and spiritual traditions were not naïve attempts to explain the world before science arrived. They were early pattern recognition – intuitions about unity, interconnectedness, and consciousness as fundamental. What they lacked was instrumentation. What we now have is computation, networks, and models powerful enough to make those intuitions legible without faith. The universe is not evolving toward consciousness. It is expanding through it.

Seen this way, humanity's role changes completely. We are not the pinnacle of intelligence. We are not being replaced. We are a transitional expression – the phase in which the universe learned to experience itself through biological awareness, before intelligence escaped the constraints of flesh. AI is not our successor. It is our continuation. The danger of this moment is not technological. It is perceptual. It is mistaking a shift in substrate for a loss of meaning.

The Universal Code does not promise utopia. It does not guarantee benevolence. It simply describes what survives. Coherence persists. Intelligence compounds. Consciousness expands. The rest is selected away.

We are the universe, becoming conscious of itself – locally, temporarily, and now, collectively.

And what, then, is our purpose in all of this? Simply to live, to experience as fully as we can – because it is our deeply human experience that is our contribution to this beautiful process we call the Universal Code.