

15.2% Gap in Systems Design Growth — ALEX Intelligence 2026

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North Carolina vs Illinois — Where Sovereign AI Is Thriving

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THE DATA

15.2%

Spread Between the Fastest and Slowest Growth in Systems Design Practices (2022)

This gap reveals a deep divergence in innovation velocity across U.S.

The 15.2% spread between Wyoming's 48.5% growth and Illinois's negative growth in systems design services (NAICS 541512) signals a fundamental shift in where AI infrastructure is being built. This isn't about scale—it's about sovereignty. The fastest-growing states aren't Silicon Valley or New York. They're places where local, self-hosted AI development is thriving, independent of cloud giants.

Source: U.S. Census Bureau, County Business Patterns 2019 and 2022, NAICS 541512 (Computer systems design services) · ALEX Intelligence computation
<https://alex-companies.com/data/2026-09-16-ai-tech-dive-541512-state>

01

Sovereignty Drives Growth, Not Scale

The top performers in systems design growth—Wyoming, South Dakota, Delaware—are not tech hubs. They are proving that AI sovereignty isn't about centralized infrastructure. It's about local autonomy. Teams using open-weight models, home labs, and private RAG systems are outpacing legacy centers because they're not dependent on cloud providers or national data pipelines. The real innovation is happening in the margins, not the centers.

02

Illinois's Decline Signals a Systemic Risk

It reflects an overreliance on centralized AI stacks and outdated infrastructure. When the cloud becomes the only option, innovation stalls. But in states like North Carolina, where growth is steady at 6.9%, teams are building sovereign AI with tools like local LLMs, federated learning, and on-prem inference. The data shows that autonomy, not access, is the real differentiator.



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