

Top 10 U.S. Metro for Software Publishers — ALEX Intelligence 2026

1,390 Software Publishers in One Metro

San Francisco leads—yet sovereignty grows outside the cluster

Swipe for insights →

THE DATA

1,390

Software Publishers (2022)

San Francisco-Oakland-Fremont, CA leads the U.S. in software publisher density by metro.

This number is not about scale—it's about concentration. The top-ranked metro hosts more than double the next-highest (New York at 1,266), suggesting a self-reinforcing ecosystem where infrastructure, talent, and capital converge. But this concentration does not define the future of sovereign AI.

Source: U.S. Census Bureau, County Business Patterns 2022, NAICS 5112 (Software publishers) · ALEX Intelligence computation
<https://alex-companies.com/data/2026-09-18-ai-tech-ind-5112-msa>



01

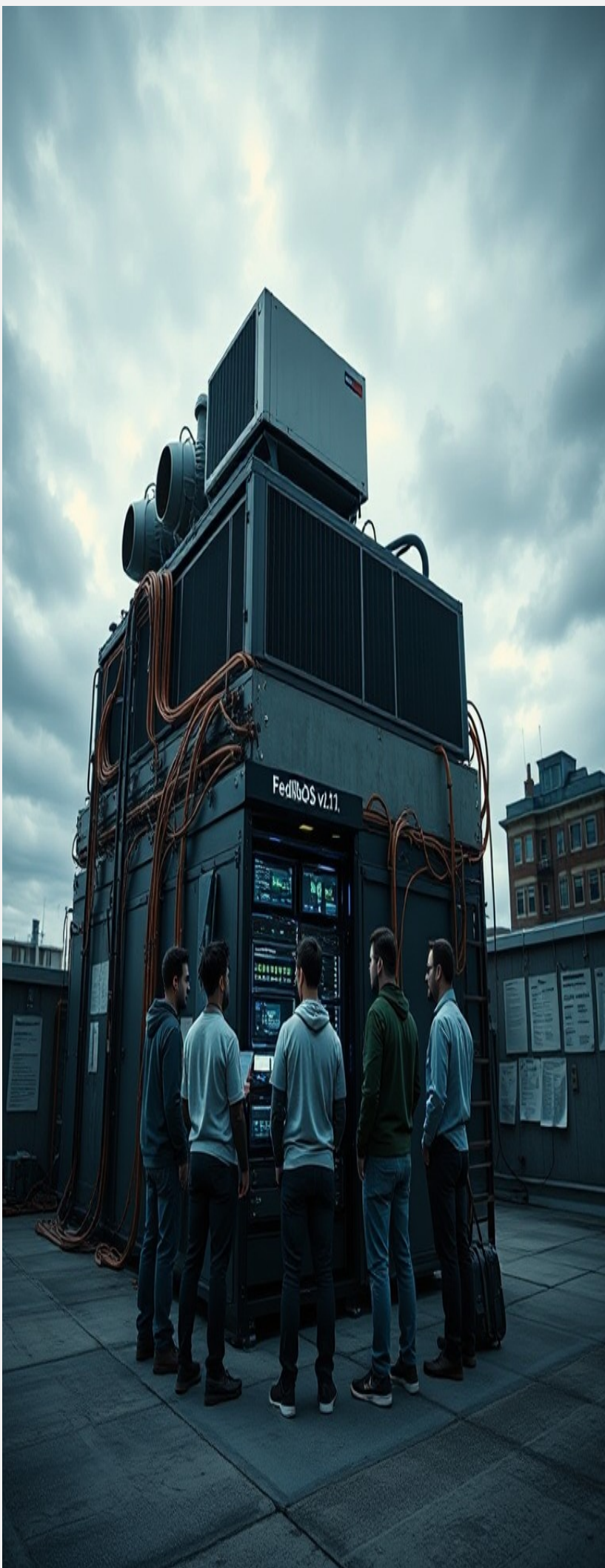
Sovereignty Begins Where the Stack Is Local

The real story isn't where software is produced—it's where it's built. The 1,390 publishers in San Francisco are not a template for sovereignty. The true frontier is in the 406 publishers in Philadelphia, the 549 in Washington, and the 684 in Boston—places where independent developers, startups, and home labs are building on open-weight models, local inference, and federated training. These are not satellite hubs. They are primary nodes in a decentralized AI economy.

02

The Power of the Small Cluster

This gap is not a flaw; it's a feature. It means that even a metro with half the concentration can sustain a sovereign AI stack. The tools are open. The models are local. The data is decentralized. What matters is not the number, but the structure: a distributed network of independent builders, not a monoculture of megacorporate hubs.



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