

#1 of 10: Share of Texas Custom Programming Shops in the Top Three Texas Counties

**48.0% of Texas AI programming
is in just three counties**

Source: ALEX Intelligence · Published October 13, 2026

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THE DATA

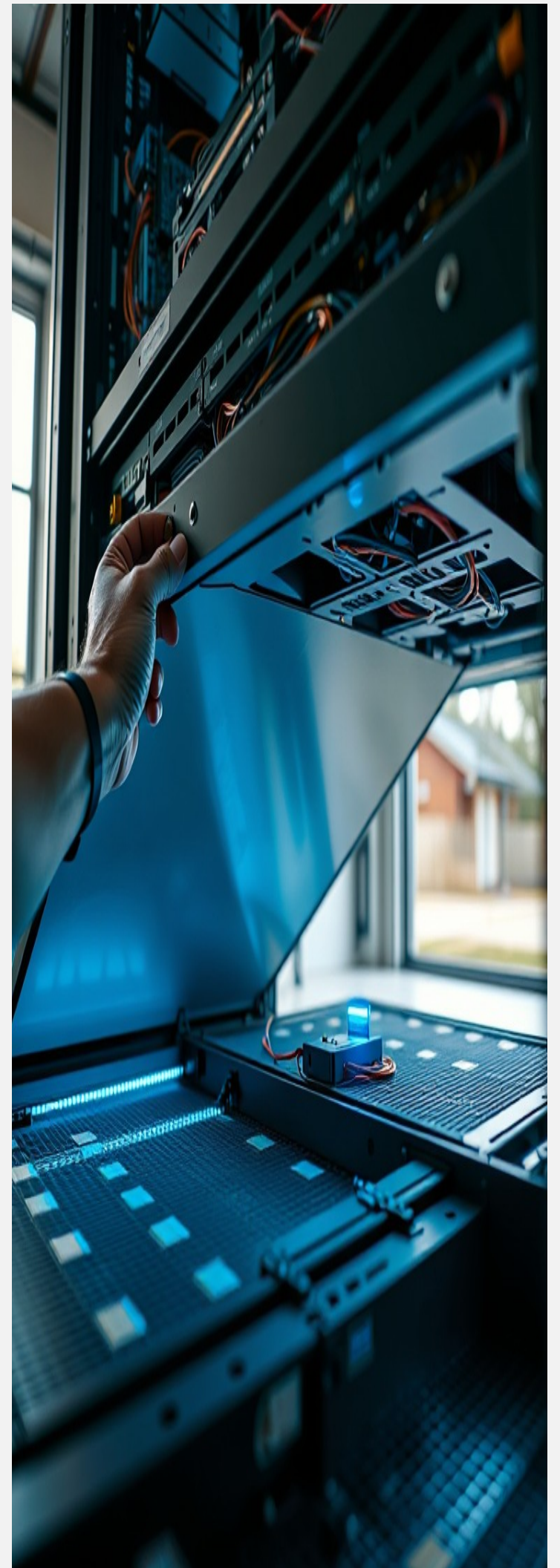
48.0%

Share of Texas Custom Programming Shops in the Top Three Texas Counties (2022)

Travis, Dallas, and Collin Counties together host nearly half of all Texas-based custom programming shops.

This concentration reveals a critical infrastructure bottleneck: the Texas AI economy is not dispersed but clustered in a narrow corridor of high-density tech activity. For independent developers building sovereign AI stacks, this means that access to specialized talent, hardware suppliers, and on-prem deployment infrastructure is overwhelmingly tied to these three counties.

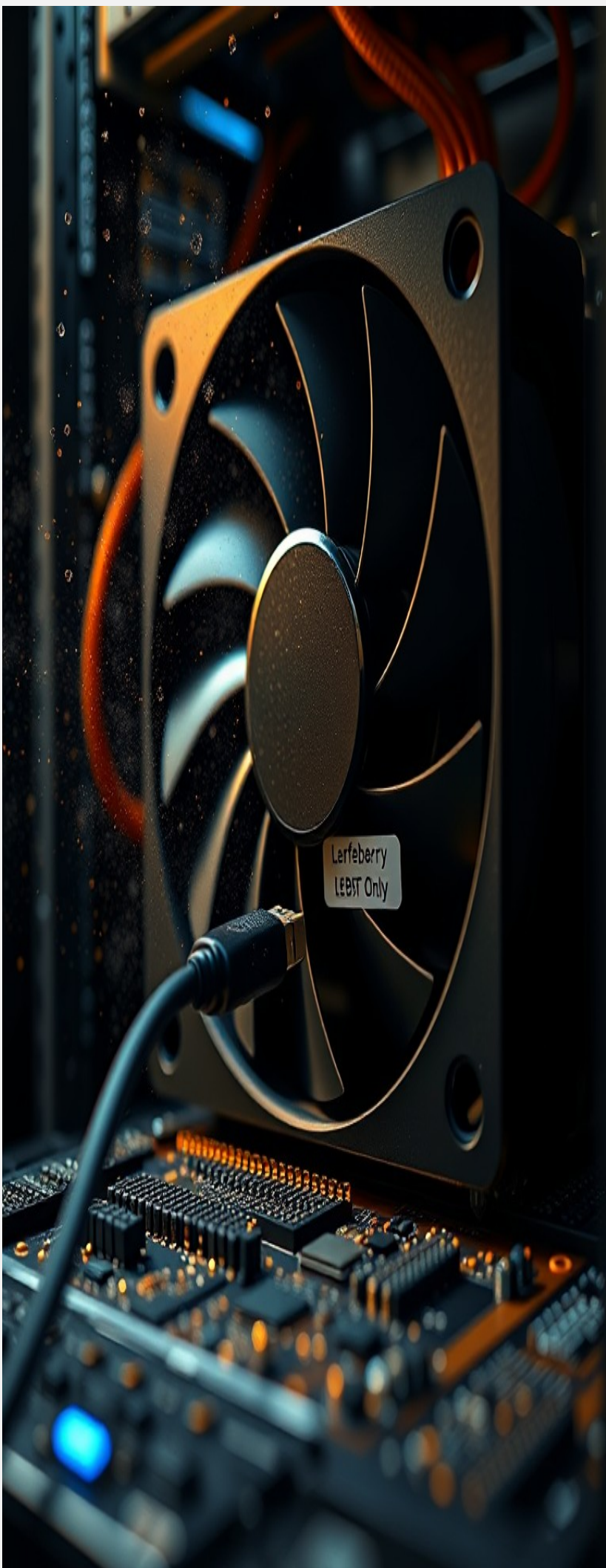
Source: U.S. Census Bureau, County Business Patterns 2022, NAICS 541511 (Custom computer programming services) • ALEX Intelligence computation
<https://alex-companies.com/data/2026-10-13-ai-tech-conc-541511-county>



01

Sovereign AI thrives in fragmentation

The dominance of just three counties in Texas’s custom programming ecosystem suggests that centralized AI infrastructure is not the future—it’s a vulnerability. For sovereign AI builders, this concentration creates an opening: by decentralizing development, hosting, and inference across lesser-known counties like Williamson, Denton, or Montgomery, teams can avoid congestion, reduce dependency on a few high-cost hubs, and build resilient, distributed stacks that are harder to disrupt.



02

The real edge is in under-the-radar deployment

While Travis, Dallas, and Collin dominate in headcount and visibility, the next wave of sovereign AI innovation will likely emerge in counties with lower density but higher autonomy. These areas—less saturated with corporate data centers and more open to local experimentation—offer ideal conditions for private RAG systems, self-hosted LLMs, and edge AI labs. The most future-proof AI teams aren't where the data is today—they're where the data hasn't yet been fully mapped.

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