



THE SOVEREIGN ARCHITECT ESSAY II OF II · THE BLUEPRINT TRILOGY

The Sequencing Argument: Champions, Enclaves, Hubs, and the Open Stack That Resolves Them

Derrydean Dadzie • On layering three theories of state-led innovation instead of picking one

Governments trying to build a technology sector from the top down tend to reach for one of three theories, usually without naming which one they've picked. I named all three in 2019. What I got wrong was treating them as competitors, when the real lesson of the years since is that they are layers, and the failure mode is picking one and discarding the other two.

The champion model

The first instinct is to find a winner and back it. A government identifies a promising firm, channels procurement and preferential treatment its way, and hopes the scale effect does the rest. The flaw isn't that this never works. It is that it concentrates two things a fragile ecosystem can't afford to have concentrated at once, the corruption risk of a government choosing commercial winners and the innovation risk of removing a firm's competitive pressure the moment it becomes politically favoured. A champion with no rivals has every incentive to defend its position and very little incentive to keep building, and the capability that once made it a credible champion begins to atrophy the moment competition stops forcing its use. Ghana's own experience backing a national technology champion in the 2010s illustrates the pattern precisely, early momentum followed by a slow retreat from relevance once the competitive pressure that forces genuine innovation was removed by the very support meant to sustain it.

The enclave model

The second instinct is geography. Build a zone, a park, a district, concentrate capital and talent inside it, and hope the concentration itself produces a Silicon Valley effect. Rwanda's Kigali Innovation City and Kenya's Konza Technopolis are the clearest African attempts at this model in the years since I first wrote about it, and both illustrate the same tension, an enclave built and sustained by government has a lifespan tied to that government's political cycle and fiscal appetite, while an enclave anchored by durable private capital can outlast the administration that seeded it. Geography alone builds a building rather than an ecosystem.

The hub model

The third instinct, the one I was most sympathetic to in 2019, is the bottom-up hub, co-working spaces, community-run, low-barrier, organic. Hubs remain genuinely valuable as the entry point for talent that would otherwise have nowhere to start. What I underweighted in 2019 is that hubs solve for talent formation, a narrower problem than the capital-formation and market-access gaps that actually determine whether a sector scales, and a government that funds hubs while assuming it has thereby funded an innovation strategy is mistaking the nursery for the economy.

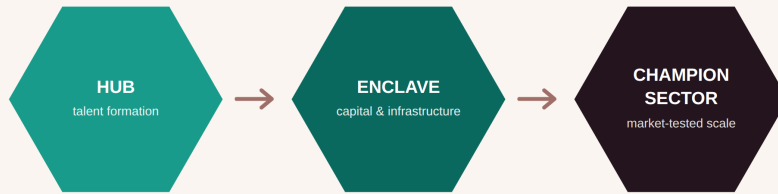
Layers, not a Selection Trap

None of these three, alone, is a strategy. Each solves for a different layer of the same system, the champion model for scale and export competitiveness, the enclave model for concentrated infrastructure and capital, the hub model for talent formation and market entry. A government that picks one and calls it a policy has built a single floor of a building and called it a house. Call this the Selection Trap, the reflex to treat three complementary layers as three competing brands, then commit an entire national budget to whichever one happens to be fashionable in that year's donor conversation.

The sharper argument, the one the GIDTB is built on, is sequencing and layering rather than selection. Talent formed through hubs feeds capability into enclaves and shared infrastructure, which in turn de-risks the kind of scaled national platforms, in payments, in identity, in agricultural data, that only succeed once genuine market discipline, not government preference, has already tested them. Ghana's own payments sector followed something close to this sequence by accident, hub-formed talent building the early mobile money experiments, market competition rather than a chosen champion determining who scaled, and the Payment Systems and Services Act arriving only after the market had already shown its actual shape. That accidental sequence is the one a blueprint should now make deliberate.

Three theories of state-led innovation, laid end to end instead of against each other.

The Selection Trap treats them as rival brands. The layering model treats them as a sequence, each one feeding the next.



the layering model — each layer de-risks the next



the Selection Trap — one theory funded, the other two discarded

DERRYDEAN DADZIE · THE SOVEREIGN ARCHITECT

Fig. 1 — The layering model against the Selection Trap: sequence versus a single fashionable bet.

Why an open stack, not a closed one

The same discipline that resolves the champion-enclave-hub argument also resolves a second question I was circling in 2019: what a government should actually build once it has the sequencing right. I argued then that Ghana needed what I called an Open Innovation Stack and Community-Playable Digital Infrastructure, shared digital rails that entrepreneurs, researchers and communities could build on with minimal friction, rather than a closed system controlled by a single vendor or a single government department. I didn't have a clean name for the idea at the time. The world has one now, Digital Public Infrastructure, and the more interesting question is not that the field arrived at roughly the same architecture I was reaching for, but why it had to.

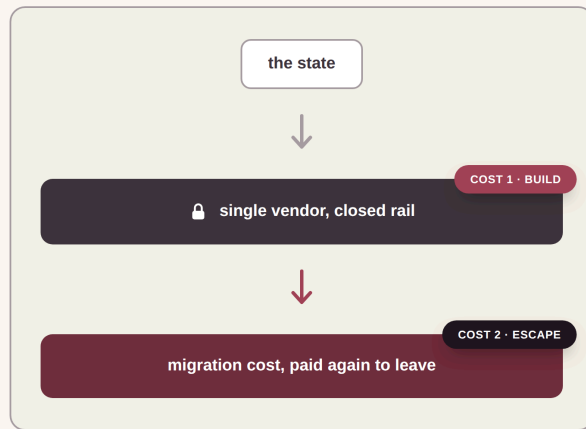
A closed system, owned by one vendor or one ministry, extracts a cost twice from a capital-constrained state. The first cost is building it. The second, and the more punishing one, is escaping it once the vendor's incentives stop matching the country's, since switching an entire national payments rail or identity system away from a proprietary vendor is a multi-year, politically fraught undertaking that few governments ever actually complete. An open, interoperable rail asks a state to pay the first cost once and then lets every subsequent layer, banks, fintechs, researchers, individual developers, build on top of it without needing the state's permission or the original vendor's cooperation each time. India's identity, payments and data-exchange stack became the reference case the rest of the world now studies for exactly this reason, not because it was more ambitious than a closed alternative, but because it was structured so that the state's investment compounded instead of depreciating. The global effort to bring fifty countries to functioning digital public infrastructure this decade is the same argument I was making about Ghana in 2019, now made at a scale large enough that donors and multilateral institutions have organised entire programmes around it.

THE OPEN STACK

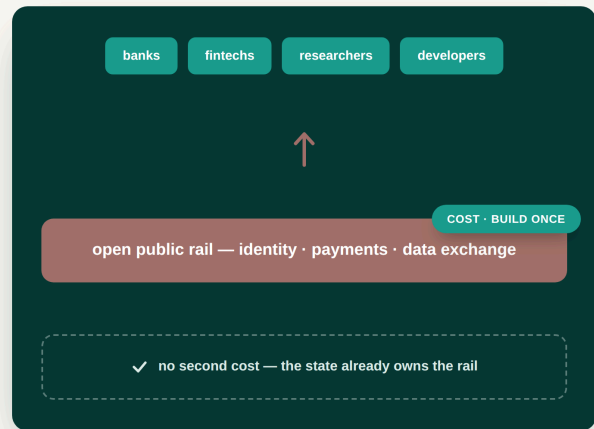
A closed rail is paid for twice. An open rail is paid for once.

The first cost is building it. The second, more punishing cost is escaping it once a vendor's incentives stop matching the country's.

CLOSED SYSTEM



OPEN SYSTEM



DERRYDEAN DADZIE · THE SOVEREIGN ARCHITECT

Fig. 2 — A closed rail is paid for twice, once to build and once to escape. An open rail is paid for once.

Why vision has to come before the stack

Vision must precede action, a government needs an audacious, communicable national vision before the infrastructure argument means anything. What I couldn't explain in 2019 was the mechanism, only the intuition. The mechanism is allocation. Infrastructure spending without a named sector to serve has no way to decide what to build first, what standard to adopt, or which institution should hold custody of the rail once it exists. A government that funds "digital transformation" in general, without naming the specific sector it intends to own, falls into what I'd call the Diffusion Trap, arriving everywhere in a diluted form and mattering nowhere in a decisive one. Vision is not the inspirational preamble to a strategy document. It is the allocation rule that tells the state which rail to build first and why.

Reconciling this with the champion problem

There is an apparent contradiction between the layering argument above and the open-stack argument that follows it. I argued against a government picking a single champion firm to back, and now I am arguing that a government should pick a specific sector, payments, health data, agricultural information, and concentrate its infrastructure investment there. These look like the same mistake in different clothing unless the distinction between them is made explicit.

Picking a champion firm means handing one entity, a company or an individual, ownership of an entire domain or value chain, and that is where the real danger sits, not merely in the corruption risk of the selection process but in what the selection produces. A sector with a single anointed champion stops being a market in any meaningful sense, because there is no rival left to compete against, no second bidder for talent, no alternative employer to answer to. What a government has actually built at that point is not a national champion. It is a private sovereign, a company that controls the entire ecosystem it was meant to compete within, including the workforce that depends on it and the pace and direction of the sector's own evolution. No

government should be in the business of manufacturing a sovereign that happens to be privately owned, because a monopoly of that kind answers to no electorate and faces no regulator in the way an actual sovereign would. Once a single player controls a whole domain, there is no one left to advocate for the workers inside it, no competing employer to bid wages up, no rival vision of how the sector should evolve, and no outside pressure forcing the incumbent to keep building rather than simply defend what it already has.

THE OPEN STACK

Owning a rail and owning a market are not the same ambition.

A champion firm forecloses the market it was meant to compete within. Infrastructure ownership keeps that market open above a rail the state alone holds.



DERRYDEAN DADZIE · THE SOVEREIGN ARCHITECT

Fig. 3 — Owning a market forecloses it. Owning a rail keeps it open, with competitors free to build above.

Picking a sector for infrastructure investment avoids this trap entirely, because the state is choosing what it will own, not who will win. Picking a champion firm means the state is choosing a winner inside a market, which forecloses competition among the private actors who should be fighting for that market on merit. Picking a sector for infrastructure investment means the state is choosing which rail it will build and hold as a public good, while leaving the market built on top of that rail as open and contestable as it was before. When Ghana's mobile money rails matured, the state did not anoint a single provider as the national champion. It allowed several providers to compete on top of an increasingly interoperable payments environment, and competition, not government preference, decided who scaled, with an institutional aplomb no single ministry engineered on purpose. That is the difference between owning infrastructure and owning a market, and it is the difference a government has to hold onto if it wants the benefits of a champion sector without manufacturing a private sovereign in the process.

What this looks like in practice

Ghana's National AI Strategy, which I led the major part of authoring for the 2022 to 2033 period as part of a broader effort with the Future Society, is the closer answer to what I was gesturing at in 2019. It is not a slogan. It names the sectors the country intends to lead in, the institutional capability required to get there, and the infrastructure, much of it exactly the open-

stack kind of infrastructure argued for above, that has to exist underneath the strategy for it to be more than aspiration. The gap between a vision statement and a strategy document is the same gap I identified in the blueprint essay before this one, one tells a country where it is going, the other specifies how it actually gets there and who is accountable for each leg of the journey.

The realistic ambition for any government is not to build every layer of the stack at once. Kenya owns the fintech conversation globally because of a genuinely open mobile money rail that outside developers could build on top of, not because it out-invested every competitor. China's manufacturing dominance and India's software services dominance follow the same logic, each country won a specific, defensible layer of the global technology economy rather than attempting to be competitive everywhere at once. Ghana's own head start is in payments, built on two decades of institutional learning that predates most of the continent's fintech sector. The sharper version of the argument I'd defend now is that a government should name the one layer where it already has institutional memory and de facto advantage, build the open rail underneath that specific ambition, and resist the Diffusion Trap's temptation to declare victory across every sector simultaneously. Technology is only relevant if it demonstrably simplifies the lives of the people transacting on top of it, and an open stack without a named destination is infrastructure waiting for a purpose that vision alone can supply.

The Blueprint Trilogy is published as two parts, this piece and "The Blueprint Question," at derrydean.substack.com · The Sovereign Architect.