



# ECONOMIC IMPACT ANALYSIS 2026

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POWERING CANADA'S INNOVATION ECONOMY



Kanata North is a global innovation hub that is paving the future of technology. The breakthroughs happening in this community touch **billions of people** every day.

– ANDY THOMPSON

Nokia Canada and Chair of the Board of Directors  
Kanata North Business Association

# EXECUTIVE SUMMARY

## A globally distinct deep-tech ecosystem.

Ottawa is home to over 2,000 technology companies and the highest concentration of tech talent on the continent. It hosts over 90% of Canada's industrial telecommunications R&D and is the country's largest semiconductor and photonics cluster.

At the heart of this is Kanata North, Canada's Largest Technology Park: a full-stack innovation hub where companies design, build, test, certify, and deploy complex systems, shaping the next generation for Canada and its allies. Few technology clusters in the world combine compound semiconductors, mission-critical software, defence systems, and advanced manufacturing in one geography. Located in a G7 Capital, the park sits at the doorstep of federal departments, national research labs, defense headquarters, and policy leaders, empowering collaboration and advocacy at the highest levels.

This concentration of expertise in one place accelerates progress, shortens development cycles, and unlocks opportunities that would be harder to achieve anywhere else. As a designated Special Economic District, Kanata North is purpose-built to amplify this advantage: reducing friction, attracting investment, and shaping the next generation for Canada and its allies.

Our next chapter leverages this rare convergence to attract investment, talent, and global partnerships at scale. This report serves as both proof of progress and a roadmap of the opportunities ahead for those ready to invest, innovate, and grow here.

Yours,  
Kelly Daize, Executive Director



When we founded the Kanata North Business Association, we envisioned **a community where innovation, talent, and industry could grow together.**

Today, Kanata North is not only delivering on that vision — it's elevating Canada's global standing in technology and advanced research.

– JENNA SUDDS, P.C., M.P.

*KNBA's founding Executive Director and current Kanata North Member of Parliament, Parliamentary Secretary for Digital Transformation, Procurement and Defence Procurement, and Chair, Liberal Technology Caucus*

# METHODOLOGY, APPROACH, AND DEFINITIONS

## METHODOLOGY AND APPROACH

Doyletech conducted this report's evaluation between February and April 2025 using data from KNBA, Invest Ottawa, and Doyletech's proprietary databases and methods.

The first phase involved collecting various data from over 800 firms in Kanata North. The second involved conducting the economic impact analysis based on the insight and data from the first phase. For clarity, no companies were "counted twice" in any of the analysis.

Macroeconomic impacts were quantified using Doyletech's DT ECONWIN model. A widely used Canadian tool developed over 20 years, DT ECONWIN evaluates economic relationships among industry, government, and households.



Kanata North is a **key economic engine** and home to Canada's Largest Technology Park. The innovation happening here creates jobs, drives growth across the National Capital Region, and strengthens Ottawa's role as a **leading global tech hub**.

– MARK SUTCLIFFE, MAYOR OF THE CITY OF OTTAWA

## DEFINITIONS

To provide clarity, the following explains key terms used in the report:

**Direct impacts** come from an initial change in demand for goods and services and affect the industries that must respond by producing more goods or services.

**Indirect impacts** occur when those industries purchase goods and services from their suppliers.

**Induced impacts** reflect the spending of wages earned by workers hired as a result of this activity. Not all income is spent immediately, as some goes to taxes and savings, but the portion that is spent creates additional economic activity.

**Together**, these effects show how an initial change in demand ripples through the broader economy.

**Export** refers to the companies which contribute to the economic base of Kanata North, i.e., the tech sector

**Local** refers to the companies within Kanata North that primarily serve residents and businesses in Kanata North, recirculating local income, for example, through professional and other services such as legal, financial, construction, and hospitality.

# KANATA NORTH: THE BIG PICTURE

Total economic impacts Kanata North generated across Canada in 2025\*

**\$17.9 B**

GENERATED IN TOTAL ECONOMIC OUTPUT  
ACROSS CANADA IN 2025

**\$9.7 B**

VALUE-ADD CONTRIBUTED  
TO CANADA'S GDP

**63 K+**

TOTAL JOBS SUPPORTED

**30,978**

DIRECT EMPLOYMENT

**\$3.3 B**

GROSS OPERATING  
SURPLUS GENERATED

**\$2.8 B**

INTERNATIONAL  
EXPORTS GENERATED

**\$6.1 B**

PAID IN TOTAL  
LABOUR INCOME

**802**

COMPANIES IN STUDY

*\*Please note, these impacts include three layers. Direct impacts are the immediate effects on industries that must increase or decrease production in response to a change in demand for goods or services. Indirect impacts reflect activity created among suppliers. Induced impacts result when workers spend their wages in the economy. Together, these effects show how new demand multiplies across industries, households, and regions.*

# ECONOMIC IMPACTS

**Kanata North generated \$3 billion in taxes to all three levels of government in 2025.**

The substantial taxes paid by Kanata North support essential services and infrastructure at the national, provincial, and local levels.

Federal taxes fund national programs such as defence, immigration and border services, federal policing, international aid and diplomacy, as well as income supports including CPP, OAS, and EI.

Provincial taxes are critical to delivering health care, education, social services, and transportation.

Municipal taxes support local infrastructure and community services, including roads, public transit, emergency services, and parks and recreation.

**\$1.33 B**

**FEDERALLY**

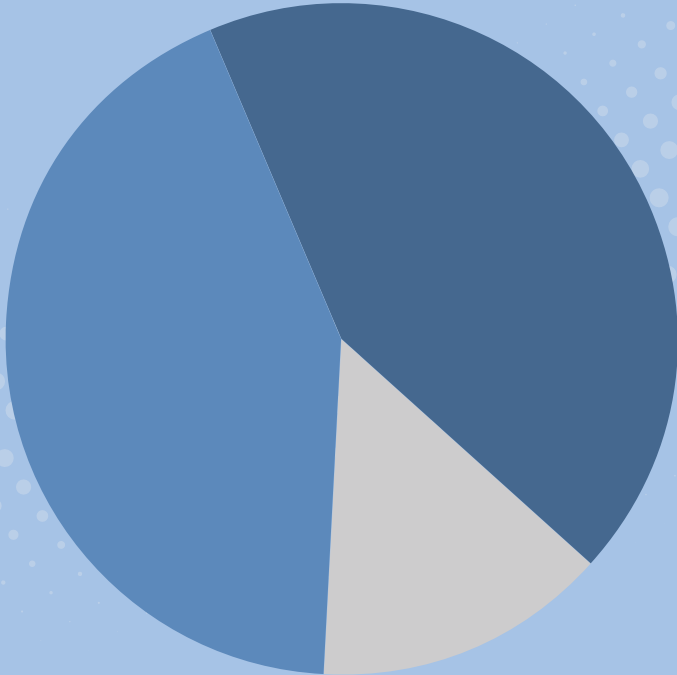
Representing approximately 1% of total federal income tax revenues.

**\$1.32 B**

**PROVINCIALY**

**\$299 M**

**MUNICIPALLY**



# SEVEN SUBSECTORS OF THE HIGH TECH INDUSTRY IN KANATA NORTH

## MANUFACTURING, ENGINEERING, TESTING, SEMICONDUCTORS, TELECOM, PHOTONICS

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As Kanata North's largest subsector, this group drives the design, development, and production of advanced technologies embedded in global supply chains.

It ranks first in employment and company count, generating 48.3% of the Tech Park's total revenues.

## SOFTWARE, DATA, AND CLOUD SERVICES

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Foundational to the digital economy, this subsector enables modern business operations, innovation, and economic growth. It is Kanata North's second-largest subsector in terms of revenues and number of companies.

## DEFENSE, SECURITY, AND AEROSPACE

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Represented by a number of large, national firms, and supported by Ottawa's designation as Canada's Defence Hub, this is the third-largest subsector in Kanata North by total employment and fifth-largest by revenues.

## CLEAN TECH

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A small and 100% Canadian subsector with strengths in water analytics, decontamination systems, and software control and monitoring for high tech applications.

## LIFE SCIENCES

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This subsector brings together research, clinical development, manufacturing, and commercialization to translate scientific discovery into real-world health and wellness solutions.

## OTHER TECHNOLOGY SECTOR

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This section covers companies in categories including computer systems design and related services, and computer and peripheral equipment manufacturing.

## VARS AND PARTS SUPPLIERS

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While small in number of companies and overall revenues, this subsector delivers an impressive level of direct output per employee, punching above its weight economically. This subsector includes companies that supply and assemble technology components. Though small in scale, it produces unusually high output per employee.

# MANUFACTURING, ENGINEERING, TESTING, SEMICONDUCTORS, TELECOM, AND PHOTONICS



Public investment in Ranovus has catalyzed **real momentum** in Kanata North's semiconductor ecosystem, showing what's possible when government and industry pull in the same direction. By supporting Canadian-owned world-class innovation at Ranovus, Canada will secure a strategic beachhead in next-generation photonics market for scaling AI infrastructure.

## HAMID ARABZADEH, CEO OF RANOVUS

Manufacturing, Engineering, Testing, Semiconductors, Telecom, and Photonics is the Technology Park's largest subsector. Since KNBA's 2018 report, this sector has grown significantly as well with 25 new companies in this category.

Manufacturing, engineering, testing, semiconductors, telecom, and photonics form Kanata North's largest subsector, adding 25 new companies since 2018.

The region's photonics and semiconductor cluster is well positioned for growth, leveraging deep technical diversity, historic strengths, and emerging opportunities in compound semiconductor fabrication. Strategic investment in supply-chain resilience and manufacturing infrastructure - particularly a commercial-scale III-V compound semiconductor fab - could significantly enhance economic sovereignty and regional impact.

Widely known as Silicon Valley North, Ottawa is Canada's most concentrated hub for semiconductor and photonics innovation, hosting 90% of the nation's industrial telecommunications R&D and the Canadian Photonics Fabrication Centre. A recent Doyletech study estimates the sector generated C\$12.65B in national output in 2024, supporting 48,453 jobs.

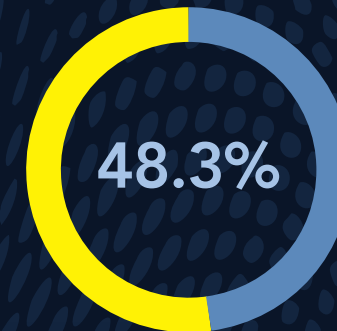
Advanced manufacturing is a core pillar of the Kanata North ecosystem, integrated with software, telecom, and cybersecurity. Companies such as Jabil and Sanmina, alongside accredited testing and certification providers like TÜV SÜD, enable local design, building, testing, certifying, and deploying complex systems - shortening innovation cycles and reinforcing Kanata North's role as a full-stack, end-to-end technology and manufacturing hub.

## OUTPUT

According to the research, the subsector generates \$4,036,568,788 in output, accounting for 48.3% of the Tech Park's total revenues.

## EMPLOYMENT

With over 15,000 employees - or 58% - this subsector employs over half of all staff in the area.



OUTPUT \$4,036,568,788

58%  
OF THE WORKFORCE



# DEFENCE SECURITY AND AEROSPACE

As a G7 capital city, Ottawa is uniquely positioned to lead the country in defence and security.

Home to the Department of National Defence, the Canadian Armed Forces, federal regulators, national R&D labs, and a thriving technology sector, the city unites policy, procurement, and prototyping within a single ecosystem. Ottawa is also the seat of government, and hosts more than 140 federal departments, NATO-affiliated organizations, over 130 embassies, major prime contractors, and Area X.O — a public test and demonstration environment for advanced technologies.

Ottawa is the only city in Canada with a critical mass of four NATO DIANA Test Centres (Area X.O and three labs of the National Research Council)

It also serves as the headquarters of the Department of National Defence (DND), Royal Canadian Mounted Police (RCMP), Canadian Security Intelligence Service (CSIS), and Communications Security Establishment (CSE).

Kanata North is one of Canada’s most concentrated defence technology ecosystems, with deep strengths in mission-critical software, secure communications, cybersecurity, and complex systems integration.

Built on decades of telecommunications and embedded systems leadership, the region now supports advanced defence and dual-use technologies across air, land, sea, space, and joint domains.

Core capabilities include embedded and safety-critical software, C4ISR, cyber-resilient systems, secure and tactical communications, and growing expertise in electronic warfare and spectrum operations integrated with AI and autonomous systems.

These strengths are reinforced by advanced manufacturing, testing, and certification infrastructure that enables companies to design, build, and deploy complex defence systems locally.

Anchored by major defence primes and Tier-1 suppliers, Kanata North provides direct pathways for SMEs to integrate into domestic and allied supply chains.

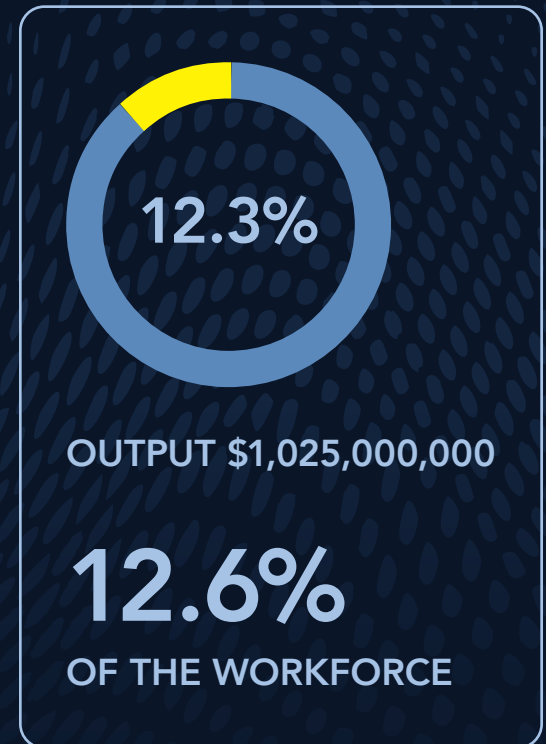
Together, these capabilities position the region as a nationally-strategic hub for defence innovation, industrial growth, and allied interoperability.

## OUTPUT

Based on the research, the output at over \$1 billion represents 12.3% of the Kanata North Tech sector.

## EMPLOYMENT

This subsector employs 3,300 employees representing 12.6% of the Tech Park’s employees.



# SOFTWARE, DATA AND CLOUD SERVICES



We build software that underpins critical systems that require safety, security, reliability and performance. Ottawa is a key hub for innovation and the development of QNX technology. In fact, Ottawa currently has the most open roles by office location globally, a testament to QNX's continued success within the marketplace.

## GRANT COURVILLE, SVP, PRODUCTS & STRATEGY, QNX

Kanata North is more than a consumer-tech or SaaS hub. It is a centre for advanced technology that powers critical systems — from vehicles and telecom networks to data centres and national infrastructure — where safety, security, and reliability are essential.

Companies here build and protect the digital networks that keep modern systems running. Together, they make Kanata North a globally-recognized cluster for secure digital infrastructure, advanced mobility, defence technologies, and next-generation networks.

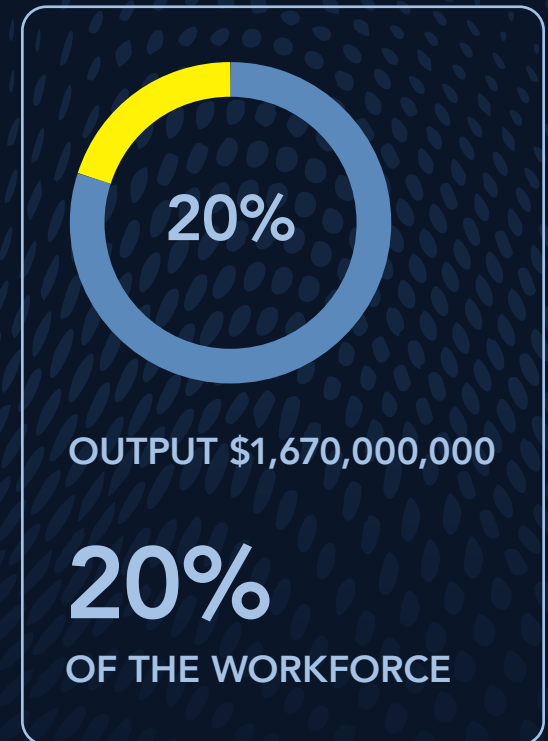
What makes Kanata North globally distinctive is the combination of:

- Embedded software
- Embedded cybersecurity
- Automotive & mobility platforms
- PKI and cryptographic trust systems
- Cloud + edge computing
- Defence-grade requirements

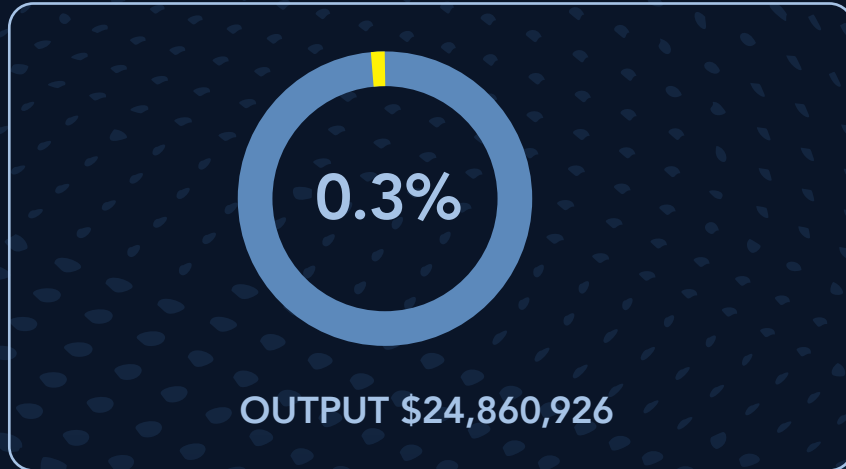
The Kanata North software cluster is one of the very few global hubs that combine all of these capabilities in one place.

## EMPLOYMENT

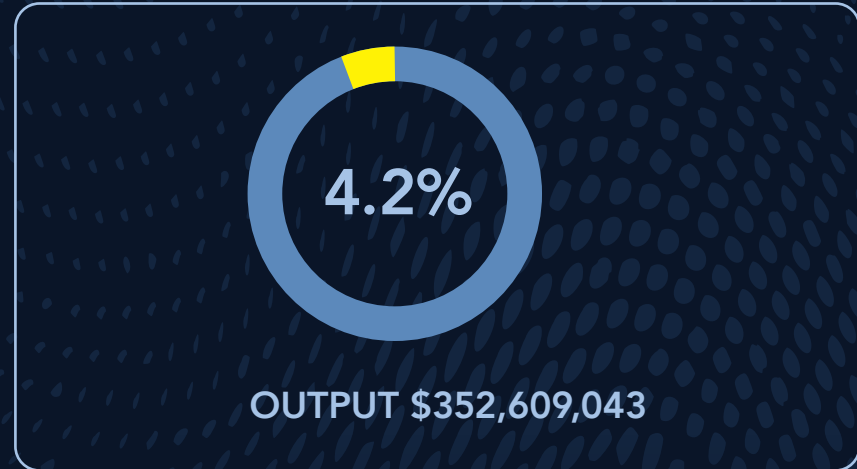
This subsector employs 4,234 people, representing 20% of total employment.



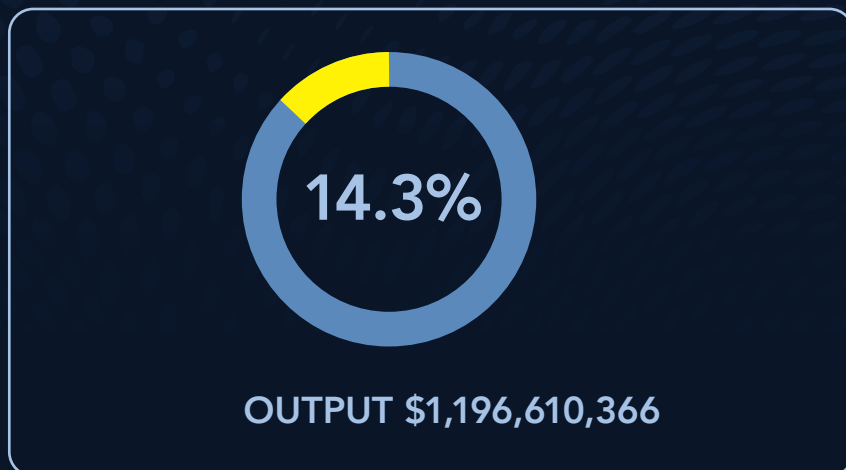
## CLEAN TECH



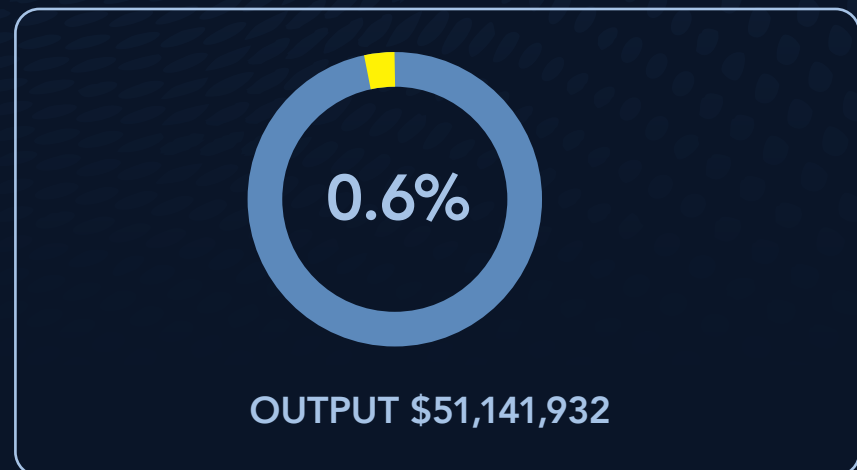
## LIFE SCIENCES



## OTHER TECHNOLOGY



## VARS AND PARTS SUPPLIERS



# LOCAL ECONOMY

## BRINGING LIVE WORK PLAY TO LIFE

As Canada’s Largest Technology Park, Kanata North is not only a global centre of innovation, but a powerful driver of the local economy.

The technology ecosystem sustains a thriving network of restaurants, retail, hospitality, professional services, and other local businesses that support the tens of thousands of people working in the park each day.

Today, this service economy includes nearly 500 companies, employing almost 5,000 people and generating over \$1.1 billion in annual revenue.

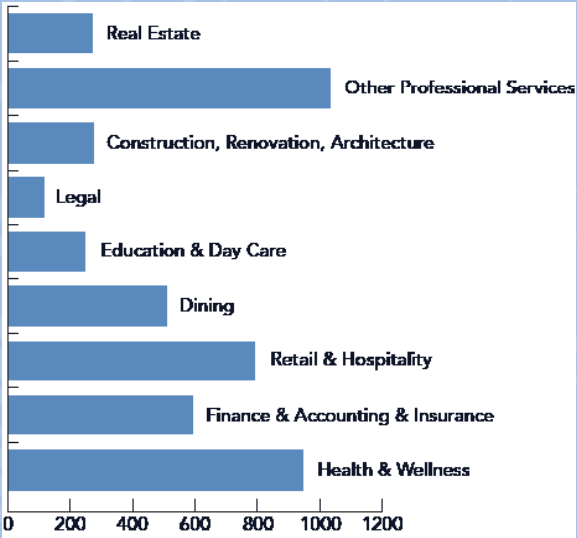
Together, these businesses transform Kanata North from a technology workplace into a dynamic live-work-play community, strengthening quality of life, supporting talent attraction, and enabling the continued growth of the region’s innovation economy.



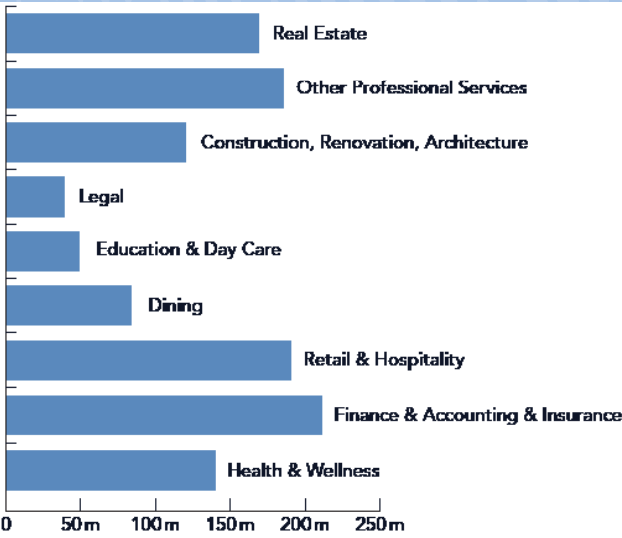
The economic strength of Kanata enables **important reinvestments across our community** and generates ample diverse job opportunities for Kanata and Ottawa overall. The revenue generated here helps us expand services, improve infrastructure, and ensure Kanata remains a vibrant, family-friendly place to live.

– COUNCILLOR CATHY CURRY

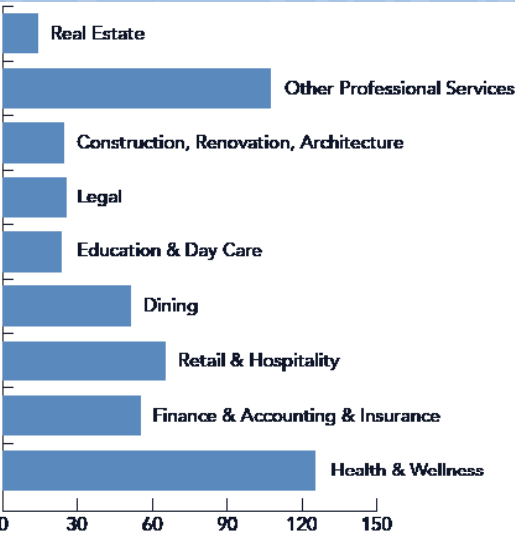
### EMPLOYMENT: 4,760



### REVENUE: \$1.1 B



### COMPANIES: 489



# OPPORTUNITIES

Since 2015, when the KNBA's inaugural economic report was released, Kanata North has attracted investment, alliances, and partnerships ranging from industry, education, media, and investors, to provincial, national, and global governments.

This report highlights an exciting array of opportunities across the region's diverse tech sector.

## COMPOUND SEMICONDUCTORS: FROM GROUND TO FINISHED GOODS

Kanata North has a rare opportunity to anchor a sovereign III-V compound semiconductor supply chain entirely within Canada, from critical minerals to finished devices.

Unlike most jurisdictions, Canada possesses both the upstream resource base—gallium, indium, germanium, and tellurium—and the technical infrastructure needed to support domestic production. By evolving the Canadian Photonics Fabrication Centre (CPFC) into a high-volume commercial foundry, Kanata North can close the loop from mine to system, strengthen national resilience, and establish a globally competitive compound semiconductor manufacturing hub.

## ENERGY AS STRATEGIC INFRASTRUCTURE

As Canada's largest technology park and one of Eastern Ontario's highest electricity users, Kanata North has a strategic opportunity to treat energy as a key competitive advantage.

Located in a grid-constrained area, Kanata North has a rapidly growing demand for energy driven by hard-tech, data-intensive R&D, and advanced laboratories.

The Technology Park can lead the development of a resilient green community energy model that delivers reliable, low-carbon, and fully resilient power. This approach would reduce operating costs, enable net-zero goals, and provide scalable energy capacity critical to protecting and expanding Ontario's innovation economy.

## **SPECIAL ECONOMIC DISTRICT**

The designation of Kanata Tech Park as a Special Economic District (SED) by the City of Ottawa creates a powerful opportunity to position the park as a nationally and globally differentiated innovation district.

The designation enables targeted incentives, regulatory flexibility, and accelerated approvals that can attract global technology firms, support startups and research-driven enterprises, and unlock investment in advanced employment uses.

Leveraged effectively, the SED allows Kanata North to operate as a living innovation district — integrating work, housing, and community life while piloting new technologies and strengthening Ottawa’s role as a premier technology hub.

## **SOFTWARE AND DUAL-TECH CONVERGENCE: WHERE SOFTWARE MEETS PHOTONICS AND HARDTECH**

Kanata North is one of the few places in the world where software and advanced hardware are developed side by side. Companies here combine software, cybersecurity, mobility, cloud systems, and defence technologies with deep expertise in photonics and networking, creating a uniquely strong environment for innovation.

This close integration allows companies to build mission-critical systems for photonics, secure communications, and other advanced technologies — something very few tech hubs in the world can replicate.

## **DEFENCE, SECURITY, AND AEROSPACE**

With over \$83 billion in active Industrial and Technological Benefits (ITB) obligations, Kanata North is perfectly positioned to unlock defence-driven economic growth.

Home to major defence primes such as Lockheed Martin, Thales, and Leonardo DRS, the park can serve as a national hub for SME–prime partnerships, dual-use technology development, and ITB-focused matchmaking. Establishing a dedicated defence incubator at shared workspace Hub350 would accelerate startups, connect SMEs to active ITB requirements, and reinforce Kanata North’s role as Canada’s Defence Innovation Hub.

## **TALENT**

For decades, Kanata North has attracted top-tier global talent drawn by its innovation ecosystem and exceptional quality of life.

Building on this foundation, the park has a strong opportunity to further strengthen the talent pipeline through integrated education hubs, industry-aligned upskilling programs, and future-focused learning models such as a technology high school. With active partnerships spanning local and national post-secondary institutions, Kanata North can ensure a continuous, industry-responsive workforce capable of supporting rapid technological advancement.

# ACKNOWLEDGEMENTS

The Kanata North Business Association would like to express their gratitude to Doyletech Corporation for their diligence, analysis, and attention to detail in undertaking this research.

We are also grateful to the business leaders who participated in the process: more than 40 executives across almost every sector in Kanata North. We appreciate the time they took for their inevitably busy schedules to participate in the study. Without their engagement and information, this study would not have been possible.




Thank you to Communicarium for their work to present the highlights of the report and to Madeleine Gagné for the layout and design of the report.



madeleine gagné



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