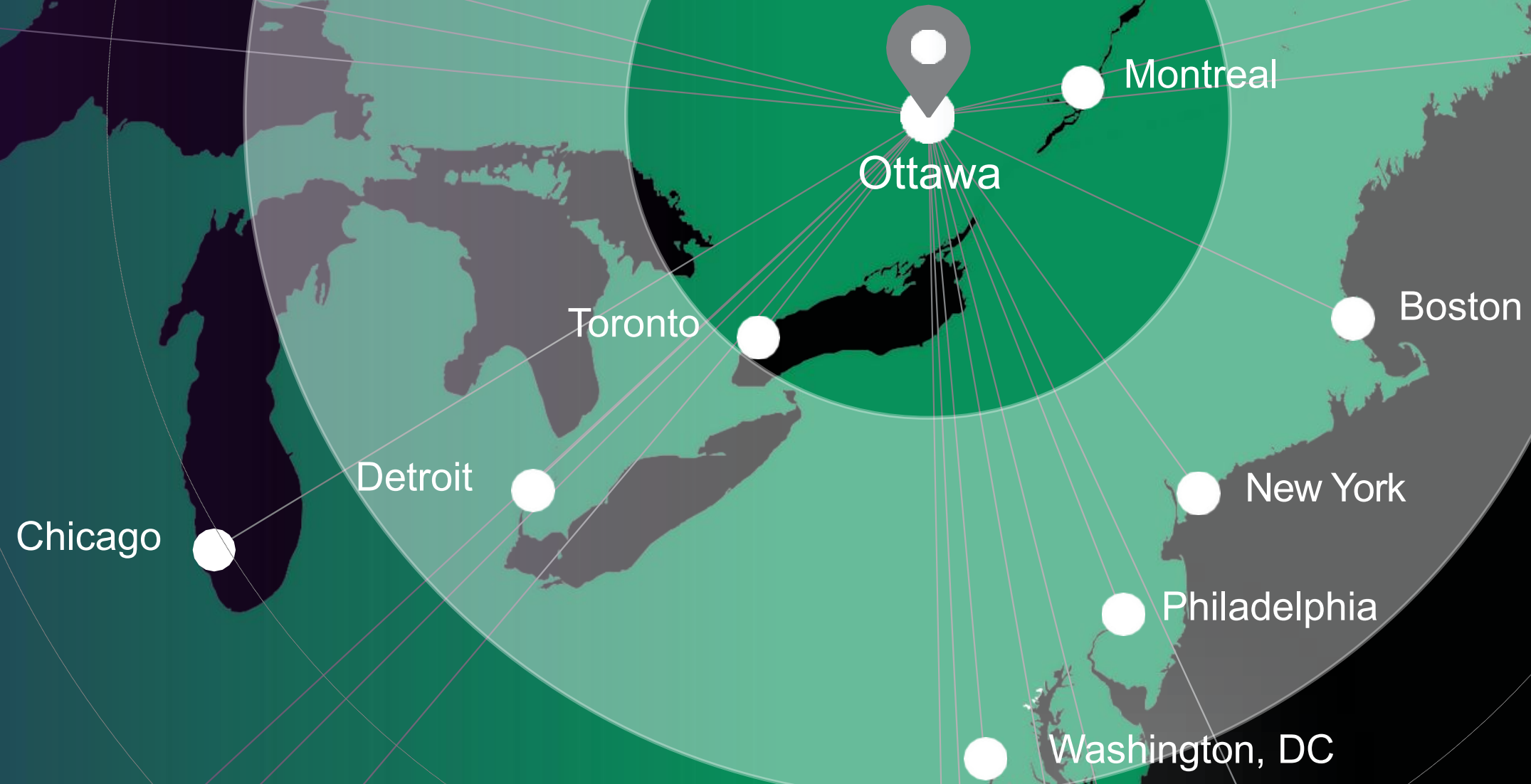


Ottawa: *Canada's National Innovation Capital*

*Doing Business in Ottawa: Gateway to the
Canadian Market*

10th June 2026



**Direct access to the
North American market**

12%

**Tech talent concentration,
highest in North America (CBRE)**

20M

**Population within 400km
(Toronto 15M, Montreal 10M)**

#2

**Second-lowest cost of living
of any Canadian city**

#3

**Quality of living rank among
top North American cities**

Private Firms

BAE SYSTEMS NOKIA
ciena ERICSSON FUJITSU
RENESAS TREND MICRO
infineon
NXP SKYWORKS tsmc DELTA
SIEMENS Healthineers MARVELL
IBM

Incubators/Accelerators and Business Supports

CENGN Invest Ottawa Investir Ottawa COURTS BAYVIEW YARDS
L-SPARK ACCELERATOR START UP CANADA

Ottawa's Innovation Ecosystem

Academia

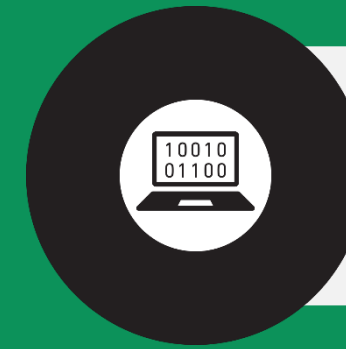
Carleton UNIVERSITY uOttawa
ALGONQUIN COLLEGE UQO UNIVERSITÉ DU QUÉBEC EN OUTAOUAIS
LA CITÉ

Government

Innovation, Science and Economic Development Canada
Défense nationale / National Defence NSERC CRSNG
Natural Resources Canada / Ressources naturelles Canada
NRC - CNRC

INNOVATION HUB:

KEY SECTORS



Software



Telecom



Aerospace & Defense



Cybersecurity



Smart Mobility



Semiconductor

AREA X.O: National R&D Complex

Operated by Invest Ottawa, Area X.O is a technology-rich, secure R&D complex for all-weather experimentation

TEST, VALIDATE, DEMONSTRATE, IMPLEMENT

- Built for next-gen smart mobility, autonomy and connectivity tech
- Onsite engineering team
- Regulator collaboration to accelerate adoption
- **\$51+ million** in tech capabilities

BROAD SECTOR APPLICATIONS

- Addressing R&D challenges and opportunities in many sectors:
- Intelligent transportation/smart mobility, ICT, cleantech, agricultural tech, drones, public safety, defence, cybersecurity, smart cities, and more.



SOFTWARE & AI

550+

Software Companies

22,000+

FTEs

A LARGE SAAS ENTERPRISE SECTOR

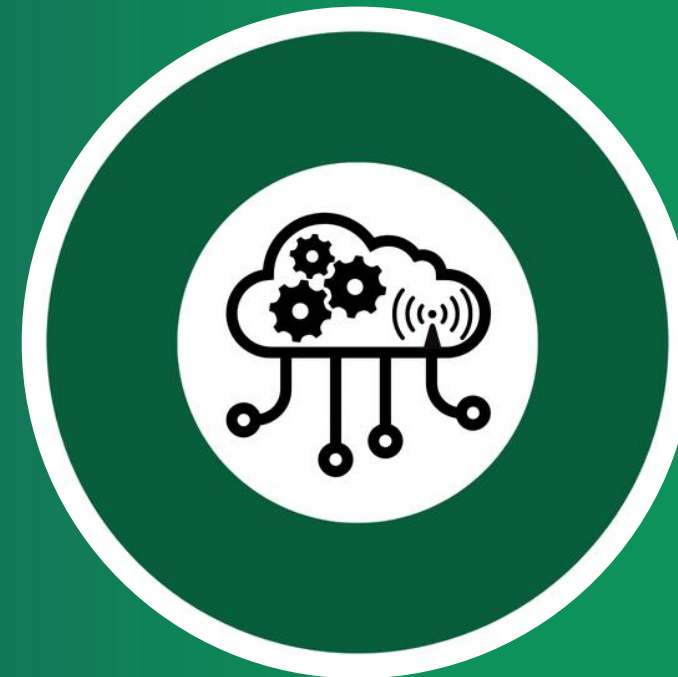
- L-Spark, Wesley-Clover support in Kanata

3 OF CANADA'S TOP PUBLICLY-TRADED COMPANIES

- Shopify, Kinaxis, & Calian

GROWING SOFTWARE VERTICALS

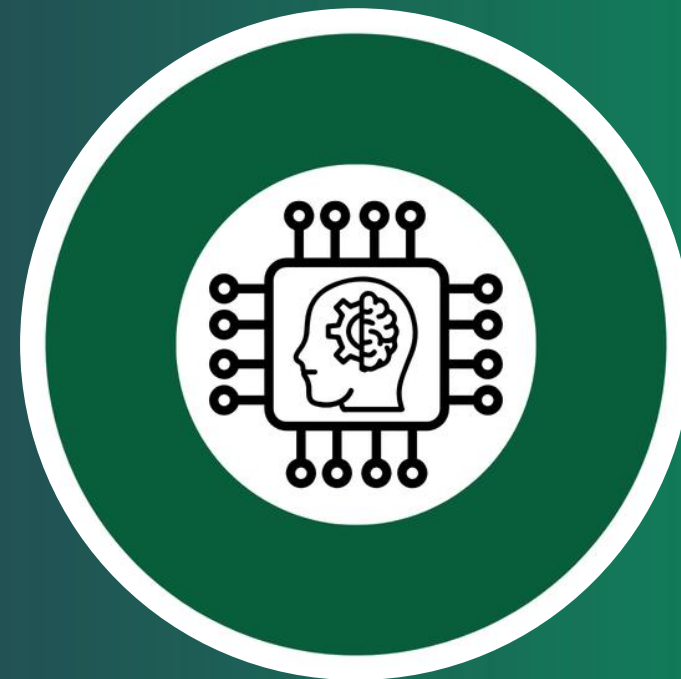
- Design & services
- eCommerce
- Logistics
- GovTech
- MET



Cloud, SaaS,
Software
Design



E-commerce
Logistics
Supply Chain



Applied Ai



GovTech



NATIONAL RESEARCH COUNCIL OF CANADA (NRC)

Ottawa's National Research
Network

NATIONAL RESEARCH COUNCIL (NRC)

4,263

full-time
equivalent staff*

14

Research centers

87

Nationalities in
the workforce

\$1,470.8M

Total
expenditures

1,222

peer-reviewed
publications

1,951

Active patents

9,690

NRC IRAP
clients

106

NRC IRAP points
of service

24

Laboratory sites

1,005

R&D projects
for clients

13,973

Total jobs supported
for IRAP clients

\$489 M

Funding invested in
SMEs

250+ **21,000+** **1st** **90%**

TELECOM

Sector companies

Telecom sector employees

City to deploy 5G

Canada's R&D

5G DEPLOYMENT AND BEYOND:

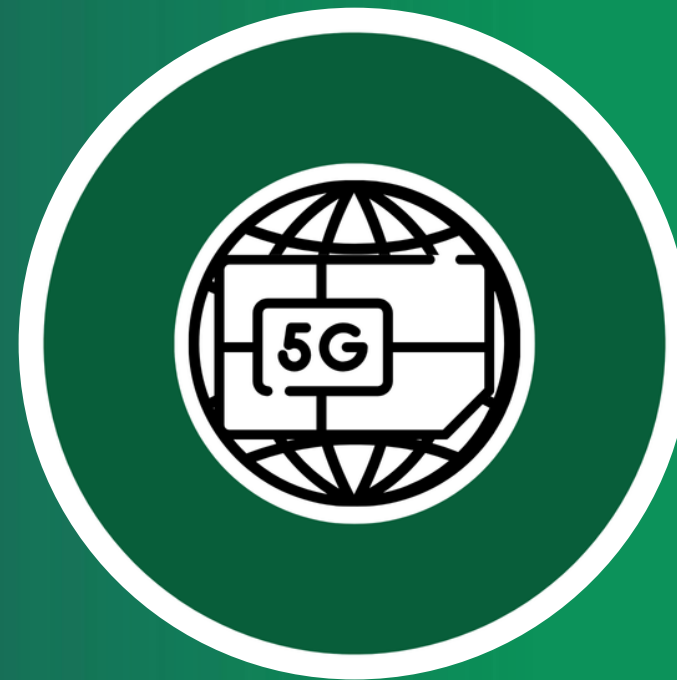
- Ottawa leads Canada in 5G
- R&D in 6G technologies positions the region for future leadership

IOT AND SMART CITIES

- Telecom-integrated IoT advances autonomous vehicles, smart cities, and local solutions for agriculture, healthcare, and logistics within Ottawa's end-to-end innovation ecosystem.

IOT AND SMART CITIES

- Ottawa companies are at the forefront of satcoms, leading global efforts to deliver high-speed, low-latency broadband through satellite constellations.
- Strong focus on bridging the digital divide and advancing rural connectivity for Canada's North.



5G / 6G



Internet of Things (IoT)



Satellite Communications



WINS THAT ARE CREATING TOMORROW

OTTAWA SUCCESS STORIES

ERICSSON 

Ericsson, with the Government of Canada, announced a **CAD \$470 million** R&D investment in its Ottawa and Montreal facilities. This investment aims to advance 5G, 6G, AI, and quantum computing technologies.

NOKIA

Nokia donated over **\$530,000** in cutting-edge technology to Algonquin College's Computer Systems Technology and Networking programs. This donation enhances hands-on training for students, preparing them for careers in the telecom industry.

TELESATTM

Telesat, Ottawa founded and based, secured **\$2.54 billion** in funding for their **Lightspeed Low Earth Orbit (LEO)** satellite constellation, to bridge the digital divide for rural connectivity, with support from the Canadian and Quebec governments.

SEMICONDUCTORS

AI-OPTIMIZED CHIPS AND HARDWARE ACCELERATION

- Ottawa leads Canada in 5G innovation and deployment.
- R&D in 6G technologies positions the region for future leadership

EFFICIENT CHIPS FOR SUSTAINABLE SOLUTIONS & SUPPLYCHAIN

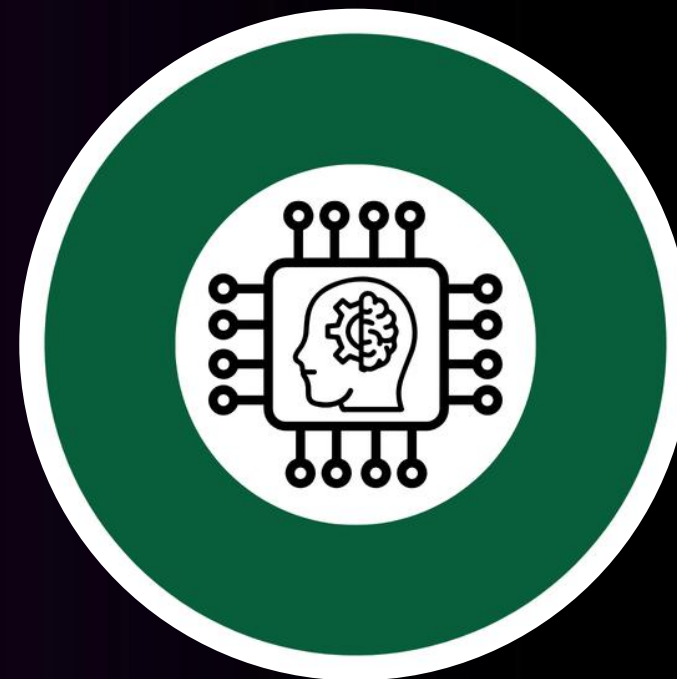
- Telecom integration with IoT powers autonomous vehicles and urban development

ADVANCED PHOTONICS AND COMPOUND SEMICONDUCTOR

- Ottawa's ecosystem plays a vital role in chip design, AI-enabled communications, and 5G/6G technologies.

90+

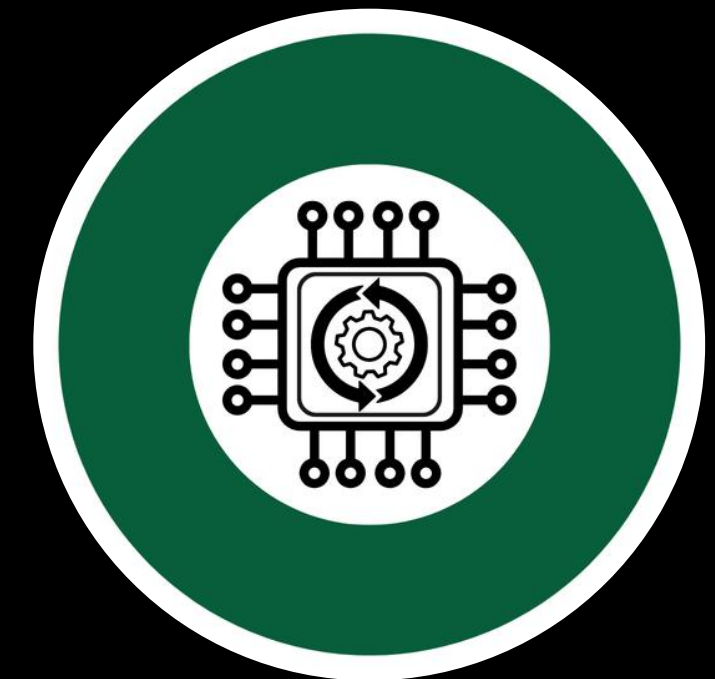
Semiconductor
sector companies



AI -Semiconductor
Intergration



Semiconductor
Sustainability



Compound
Semiconductors

INFRASTRUCTURE & EXPERTISE

CAPABILITIES

UTILIZING OTTAWA'S LEGACY & FOR TOMORROW

SEMICONDUCTOR DESIGN EXPERTISE

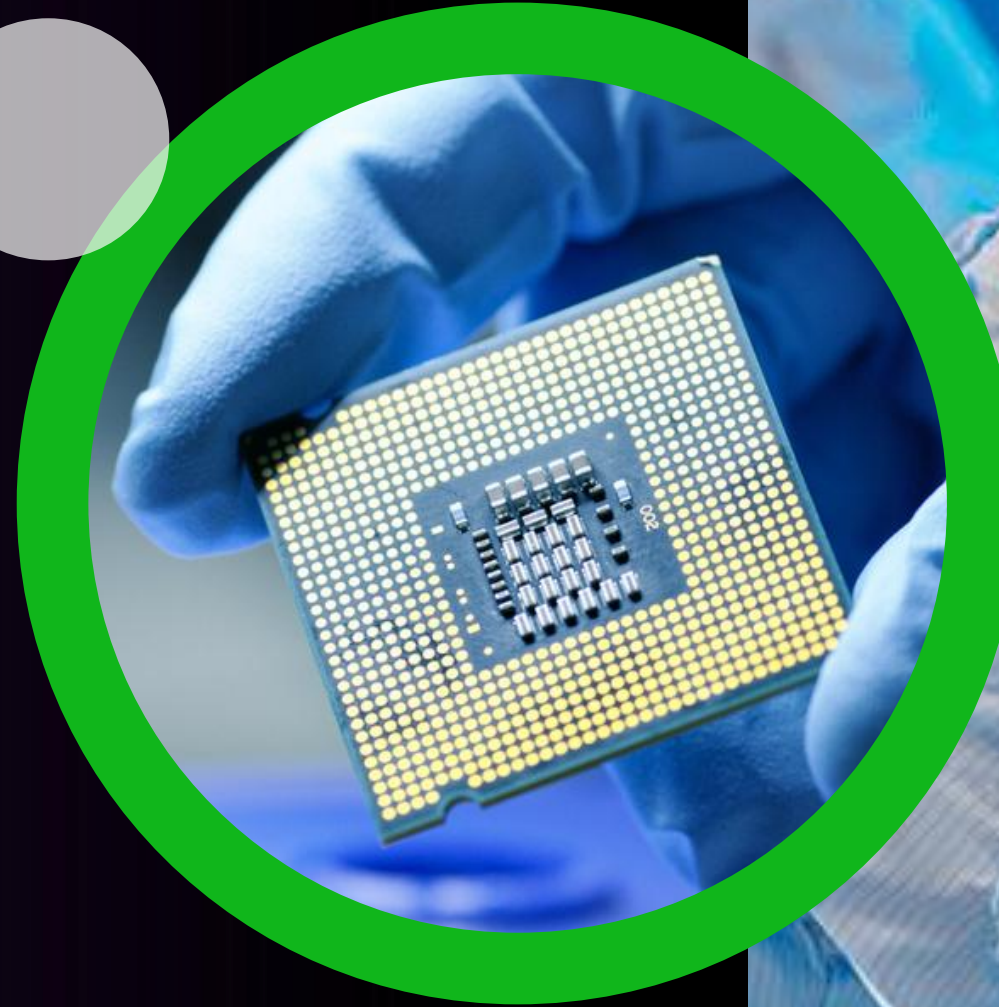
- Companies like Marvell and GaN Systems (*now acquired*) specialize in chip design for high-performance telecom and AI applications.
- Access to the **Canadian Photonics Fabrication Centre (CPFC)** enables advanced prototyping for telecom-specific semiconductors

ACADEMIC COLLABORATION

- Partnerships with Carleton University and uOttawa produce highly skilled engineers in photonics, ASIC design, and AI-driven technologies.
- Mitacs provides additional research and internship experience for on-site learning and development

KEY INDUSTRY PLAYERS

- Global leaders like Marvell, Jabil, and Infineon drive Ottawa's semiconductor advancements, supported by SMEs like Ranovus and Inpho.



Ottawa – Canada’s Defence Innovation Hub

BUILDING, TESTING, AND SCALING DEFENCE INNOVATION

330+
Defence,
Aerospace and
Cyber Companies

4
NATO DIANA
Facilities

65+
Federal Labs

130
Embassies

10k
Highly skilled workers
working in defence and
security companies

96K
Tech Workers



Advanced Infrastructure and R&D Capability: access to test facilities like Area X.O, reducing time-to-market for testing, certification, and commercialization.



Greater Access to Capital: up to \$3B in public and private investment targeted to defence, security, aerospace, and dual-use innovation.



Deep, Specialized Talent Pool: Ottawa offers a large, highly skilled tech workforce, and a strong concentration of professionals experienced in defence, aerospace, and advanced technologies.



Direct Pathways to Procurement & Global Markets: proximity to federal defence buyers and export programs streamlines procurement and strengthens access to allied markets.

DEFENCE

DEFENCE AND SECURITY HUB

- Government Stakeholders
- Defence Associations
- Prime Defence Contractors

FOCUS ON EMERGING TECHNOLOGIES

- UAV/UAS
- Advanced Robotics
- Cybersecurity and AI-driven defense systems
- Space and Satellite Technologies

SUPPORT FOR SMES & ECOSYSTEM COLLABORATION

- Industrial and Technological Benefits (ITB) obligations.
- Significant events & networking opportunities

65+

Research
labs



Remotely Piloted
Aircraft System
(RPAS)

17,000+

Defence sector
employees



Canadian Patrol
Submarine
Project (CPSP)

300+

Defence
companies



Future Fighter
Capability Project
(FFCP)

TRENDS

CYBERSECURITY

GLOBAL RISE OF CYBERCRIME

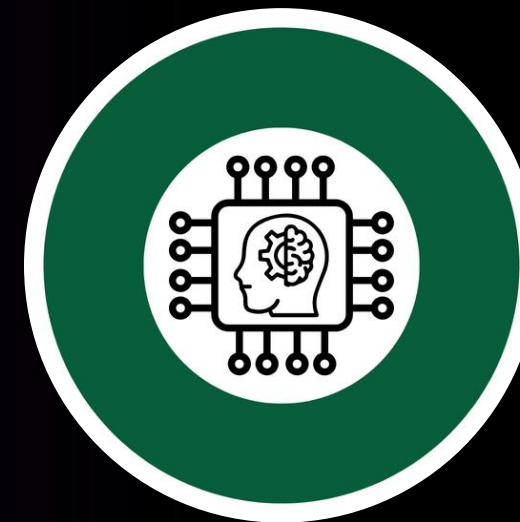
- Cybercrime costs are projected to rise from \$1 trillion to \$11 trillion annually by 2025.
- Impacts include revenue loss, downtime, reduced efficiency, and reputational damage.

QUANTUM COMPUTING THREATS:

- Within 10 years, quantum computing could decrypt today's encrypted data, threatening banking, military, & healthcare systems.

AI IN CYBERSECURITY:

- Threats: Deepfake, social engineering
- Key applications: threat detection, automated response, and natural language processing.



AI & Machine Learning

100+

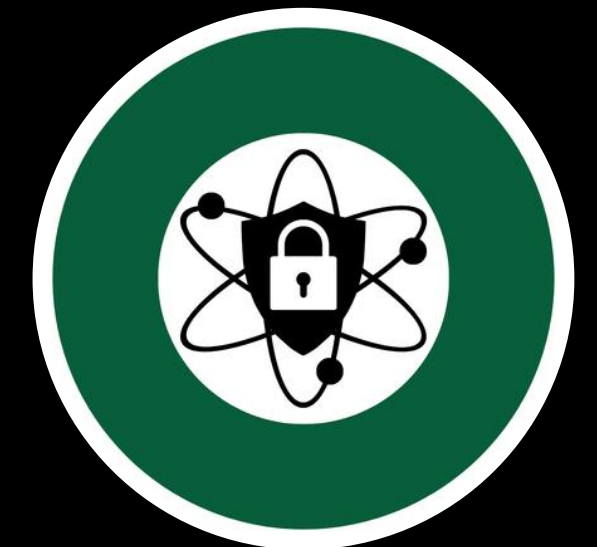
Cybersecurity Companies in Ottawa



Cloud security

\$3.83B

Projected CDN market size by 2029



Quantum Security

8.19%

Annual Market Growth Rate

INFRASTRUCTURE & EXPERTISE

CAPABILITIES

Industry-Academic Collaboration:

UOTTAWA-IBM CYBER RANGE

- First of its kind in Canada and globally unique.
- Immersive cybersecurity response training using cyberattack simulations.

ALGONQUIN COLLEGE – FIELD EFFECT CYBER RANGE

- Bridges talent shortages with simulated cyberattack training environments.

CARLETON UNIVERSITY – CYBER REFERENCE LAB

- Advanced lab for research on security, privacy, and quantum technologies.
- State-of-the-art infrastructure: enterprise servers, firewalls, and simulated network environments.
- Collaborative projects with General Dynamics.



National Cybersecurity Organizations Based in Ottawa:

CANADIAN CENTRE FOR CYBERSECURITY (CSE)

- Unified source of expert advice, guidance, and services for Canadians.

CANADIAN CYBER THREAT EXCHANGE (CCTX)

- Facilitates collaboration among cyber professionals to counter emerging threats.

WHY INVEST OTTAWA?

PARTNERS FOR SUCCESS

Invest Ottawa

As the **City of Ottawa's lead economic development agency** for knowledge-based industries, Invest Ottawa saves you time, connecting you directly with recruitment and commercial real estate professionals, potential business advisors and associates, research and development sites, government regulators and policymakers, embassy staff and any other contacts you need to support your business.

From 2012 to Q2 2023 (inclusive), Invest Ottawa has supported:



1000+
Start-ups,
Scale-ups,
& SMEs



\$1.88B
In Capital
attracted



15.2K
Jobs
created



\$1.4B
In domestic
and foreign
investment



OUR AREAS OF FOCUS:

Venture Development

- Early-stage guidance
- Incubation and acceleration
- Fostering scale up

Talent Acquisition

- Attracting world-class tech talent
- Supporting businesses in talent assistance and diversity recruitment

Global Expansion

- Foreign direct investment
- Identify local suppliers
- Business retention and expansion

Area X.O

- First integrated CAV test environment of its kind in North America
- On-site vehicle-to-everything (V2X testing)

**Foreign Direct Investment
&
Global Runway Program**



OTTAWA'S SOFT-LANDING PROGRAM

Global Runway

A **one-stop shop investor service package** to offer you the white-glove support for your investment plan in North America.

Our team can reduce your pain points by reducing the time, cultural and geographic barriers and help you set up new operations quickly for transnational business operations.



Planning

- Expert consultations
- Market expansion support
- In-market meetings



Operations

- Staffing and hiring services
- Tax/Accounting consultations
- Legal/Immigration advice
- Business banking
- Office/registered address



Support

- Access to local business network
- Funding and grants
- Business advisors
- Sector knowledge and expertise



Growth

- On-going support to scale company



Meet our Global Runway Clients!

Ayudante

 **ClearCalcs**

 **EOM SPACE GROUP**

 **SMARTINSIDE AI SAFETY TECH**

PAPRIKA™

 **CGD™**
CAMBRIDGE GaN DEVICES

RegWAY

 **mashfrog GROUP**

 **AUJAS**
CYBERSECURITY

 **mit group**

 **INTEGRITY**
COMMUNICATIONS SOLUTIONS

ADEX FLOW
INTERNATIONAL BRIDGES FOR YOUR DATA

 **SOFTWARE DEVELOPMENT HUB**

 **AEP NYX™**
PHOTONICS IN MOTION

 **People Connection INC.**

catalyst
expert open source solutions

 **FUSION FUEL CYCLES**

 **CHANECS**

 **DEEPSIGHT**

 **WiredAvenue™**

CLPS®
Global IT Services

 **healthmetryx**

esencia

 **ELECTROMOVE**

FIRST QUANTUM MINERALS

Cellusys®

 **金芯科技有限公司**
Golden Layout Technology Co., Ltd.

 **Starz Energies**

genvis

 **PIXELA LABS**

Case Study: Irdeto (The Netherlands)

Ottawa is such a multicultural centre as well as being a technology hub. We have such a diverse workforce here, we've got the knowledge, the people here have the skills that we need, it just couldn't be a better fit for a company like ours.

- **Andrew Williams, Senior Systems Architect, Irdeto**

The Irdeto logo is displayed in a white rounded rectangle. It features the word "irdeto" in a lowercase, purple, sans-serif font. There are small yellow squares above the 'i' and below the 'o'.

Irdeto is a world leader in digital platform security, providing solutions to the video, gaming, connected transport, connected manufacturing and connected health solutions.

Irdeto employs about 1000 people globally in 15 offices worldwide. Their head offices are located in Hoofddorp, while Ottawa is one of our largest global offices.

Case Study: SEA Canada

Founded in the United Kingdom, **SEA (Systems Engineering & Assessment)** delivers advanced defence and maritime systems that strengthen mission readiness across global navies.

How We Helped

Invest Ottawa's Global Expansion team supported SEA Canada in establishing its new **20,000-square-foot defence manufacturing facility in Ottawa**. By connecting the company with Canada's defence innovation ecosystem and local partners, Invest Ottawa helped SEA anchor its operations within the nation's growing hub for defence, security, and advanced manufacturing.

"The opening of this facility marks a major milestone for both SEA Canada and defence manufacturing in the nation's capital. We're proud to contribute to regional economic growth and job creation, while also supporting Ottawa's reputation as a centre for innovation and advanced manufacturing.

"By increasing our capacity to deliver cutting-edge launcher systems with reduced lead times, this site will further cement our position as a trusted global supplier of innovative and flexible countermeasure capabilities."

- Keith Cunnane, General Manager, SEA Canada

Case Study: Immersive International

Founded in the United Kingdom, **Immersive International** has spent over two decades creating captivating immersive exhibitions and story-driven experiences that engage audiences worldwide.

How We Helped

Invest Ottawa's Global Expansion team has supported Immersive International since 2024 in establishing its presence in Ottawa. By connecting the company with key ecosystem partners, including leading academic institutions, Ottawa's museums, and the local film community, Immersive gained strategic guidance and valuable networks to strengthen and scale its North American operations.

"Ottawa's rich cultural ecosystem, thriving tech community, and year-round tourism make it an ideal home for our North American base. We don't just see this new venue as a business expansion, but as an invitation to reimagine what a cultural destination can be - interactive, inclusive, and totally unforgettable."

- Jordan Foster, Head of Studios, North America



**Immersive
International**

Case Study: Aurrigo (United Kingdom)

Formed in 1993, Aurrigo is a leading international designer and developer of smart airside solutions for the aviation industry.

How We Helped

Invest Ottawa's Global Expansion team supported Aurrigo's expansion to Ottawa in 2018. Since then, the Area X.O test site has been a critical partner of the company, leveraging Ottawa's autonomous vehicle ecosystem to create new business opportunities, technological advancements, and research pilots.

For any other companies exploring Ottawa for a North American expansion, I would say just do it. There's so much opportunity here, so much talent here, and this city is a fantastic place to live
- **Dana Borschewski, Regional VP Americas**



Case Study: Siemens Healthineers (Germany)

“We have always been a proud member of the Ottawa community and are thankful that the company has seen the benefit of our access to highly skilled and motivated employees, the close network of local high-tech suppliers, and the ongoing support from the City of Ottawa through Invest Ottawa.”

- **Mathias Ganzmann, VP Global SCM Project Manager**

The Siemens Healthineers logo is displayed within a white rounded rectangular box. The word "SIEMENS" is in a bold, teal, sans-serif font. Below it, the word "Healthineers" is in a bold, orange, sans-serif font. To the right of the text is a cluster of orange dots of varying sizes, arranged in a pattern that suggests a molecular or network structure.

Siemens Healthineers is one of the world's largest suppliers to the healthcare industry and a trendsetter in medical imaging, laboratory diagnostics and health IT. Their Ottawa facility expansion accommodates further production and development of their epoc® Blood Analysis System.

Case Study: Syntronic (Sweden)

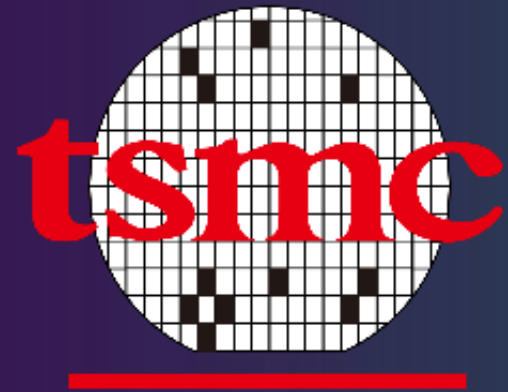
Attracted by the city's world-class tech ecosystem, the Swedish multinational was able to set up its first North American R&D office in Ottawa.



“With a world-class high-tech industry, Ottawa proved to be the perfect location for Sweden based Syntronic Group's first R&D Centre in North America.”

- Hans Molin, President, Syntronic R&D Canada.

Case Study: TSMC (Taiwan)



Leveraging Ottawa's R&D Excellence

Semiconductor chip manufacturer TSMC set up a design center in Ottawa more than 10 years ago and today it has more than 60 staff in Ottawa. The company is the world's first and largest dedicated integrated circuit foundry. It works with the semiconductor industry's innovators to make their designs into functioning products.

Why Ottawa?

The multinational company, headquartered in Taiwan, chose Ottawa primarily because of the city's high-quality, well-trained engineers and its strong reputation in R&D excellence. It also knew Ottawa's exceptional quality of life helps attract key talent.

Ontario has a very high concentration of high-tech firms and Ottawa boasts a strong reputation in research and development excellence.

- Cormac O'Connell
Director of TSMC's Ottawa Design Center

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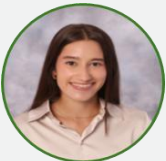
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Market Consultants/Advisors For Top FDI Target Markets
(external contractors)





THANK YOU

WWW.WHYOTTAWA.CA

