

OK COMPETES: TECH EDITION

Report Prepared for the Oklahoma Technology Alliance
by Economic Leadership, LLC

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Executive Summary

Technological innovation has driven the American economy for the better part of a century, and states that fail to keep pace risk falling behind in wages, investment, and competitiveness. The Oklahoma Technology Alliance, an affiliate of the Oklahoma State Chamber of Commerce, commissioned this report to give policymakers, industry leaders, and the economic development community a clear, data-driven picture of where Oklahoma's technology sector stands today and what it will take to strengthen it. Economic Leadership LLC built this assessment from 2025 industry and occupation data, interviews with 18 tech sector leaders across the state, and a review of how peer and competitor states are approaching tech competitiveness.

Oklahoma's Tech Sector Today

Oklahoma's tech sector is a significant, high-value part of the state economy. In 2025, the tech industry employed 88,440 people and generated about \$17 billion in wages, nearly five percent of total state jobs but over ten percent of earnings and almost 15 percent of sales. It contributed \$46.8 billion to gross state product (17 percent of the total) and accounted for 32 percent of all state taxes paid. Tech has the highest job multiplier of any industry in Oklahoma at 3.08, meaning its full economic footprint, including supported jobs elsewhere in the economy, reaches roughly 184,000 workers and 15 percent of total state employment.

Counting tech occupations across all industries rather than just tech companies tells an even larger story: 119,290 Oklahomans work in tech occupations, and 78 percent of them are employed outside the tech industry itself, in manufacturing, finance, healthcare, and government. Tech occupation employment grew 18 percent over the past five years, and median annual wages reached \$87,700.

Within the tech industry, energy technology is by far Oklahoma's largest and most concentrated subcategory, more than three times the national average, but it is also the only subcategory losing jobs, down 6.8 percent over five years with further declines projected. IT, environmental technology, and life sciences all posted five-year job growth, though from smaller bases.

How Oklahoma Compares

Oklahoma's rankings tell a consistent story: strong on cost and affordability, weaker on the drivers of future tech growth. The state ranks among the top 15 nationally for cost of living and projected working-age population growth, and 18th for business friendliness. But it ranks 35th in R&D funding relative to state GDP, 41st in patents per science and engineering worker, and 44th, its weakest infrastructure metric, in federal SBIR/STTR small business innovation funding. Independent national assessments reach similar conclusions: Oklahoma ranked 43rd on WalletHub's 2026 innovation index, 39th overall (and 30th specifically in technology and innovation) on CNBC's Top States for Business, and 40th on the ITIF Hamilton Index of advanced industries. Neighboring and competitor states, including Texas, Colorado, and Indiana, outperform Oklahoma on most of these same measures.

What Tech Leaders Are Saying

Interviews with 18 tech sector leaders across industries, education, tribal nations, and economic development surfaced a consistent set of themes. Oklahoma's core strengths are its affordability, energy and physical infrastructure, available land, quality of life, and a networked business community where leaders are, as one stakeholder put it, "one phone call away." The two-year CareerTech post-secondary training system was repeatedly cited as a standout asset.

K-12 education was named as the single biggest weakness affecting tech development, described variously as underfunded, fragmented, and low-expectation. Stakeholders also pointed to a lack of venture capital and angel investment, difficulty recruiting experienced tech talent, bureaucratic university tech transfer processes, and the absence of a unified statewide vision for tech growth.

Asked to prioritize, stakeholders converged on three actions: 1) strengthen public education, 2) add or expand tools that de-risk R&D investment such as tax credits, and 3) create regular forums that bring tech companies and leaders together across the state. Stakeholders were also clear that positioning Oklahoma primarily as a low-cost place to live does not, on its own, win high-skill tech talent or investment.



Sector Trends and What Other States Are Doing

Nationally, sectors of particular relevance to Oklahoma: aerospace and defense, energy, agtech, healthcare technology, and data centers, are all in periods of significant growth and innovation, and states are competing aggressively for a share of that growth. This report profiles how peer and aspirational states are responding, including Tennessee's Launch TN public-private innovation partnership, Indiana's regional startup grants, Iowa's equipment and automation assistance for manufacturers, and small tech transfer grants used in Arkansas and New Mexico to help move university research into the private sector. A common thread across the states outperforming Oklahoma is a clear, resourced strategy focused on a small number of sectors rather than a broad, unfocused approach.

Key Takeaways and Path Forward

Oklahoma's technology sector tells two stories at once: it is already an outsized economic contributor, and it is losing ground on the investments and infrastructure that drive future growth. The full report closes with a detailed set of takeaways; in brief, they point toward:

- Building workforce and education strategy around the full tech workforce, not just tech companies, since most tech workers in Oklahoma are employed elsewhere in the economy.

- Treating energy technology's decline as a distinct, urgent strategic problem rather than folding it into general tech policy.
- Closing the state's R&D, patent, and venture capital gaps with dedicated tools, not just awareness campaigns.
- Sustaining long-term investment in K-12 and higher education as the precondition for nearly every other goal in this report.
- Repositioning the state's affordability as one input to a competitive story, not the headline pitch.
- Preparing the workforce for AI-driven changes to tech occupations before they arrive at scale.
- Coordinating the state's genuine assets around a shared, resourced vision, the single factor most consistently identified as missing.

The report also identifies a specific role for the Oklahoma Technology Alliance and the State Chamber: leading the process of defining that shared vision, convening the state's tech leaders on a regular basis, and changing the public narrative around Oklahoma's tech sector for both residents and legislators. Oklahoma has the underlying assets to compete in a focused set of tech niches.



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The Importance of the Advanced Technology Economy in the United States and Oklahoma

It is not hyperbole to say that technological innovation has driven the US economy for the better part of a century – accounting for perhaps “half of the nation’s growth” over the past 100 years.ⁱ According to a recent estimate, the tech sector’s two trillion-dollar output represented nearly ten percent of the American economy. Tech industry employment has been growing at about twice the national average.ⁱⁱ

Innovation has driven gains in every industry, from agriculture to healthcare to finance. Recent federal policies have spurred tremendous investments in tech-heavy sectors like semiconductors, electric vehicles, and batteries. However, continued US success is far from certain. A 2026 essay argues that “the country’s global technological leadership is no longer assured and is in fact slipping, challenged primarily by China.”ⁱⁱⁱ

The United States faces tremendous competition for technology adoption and innovation—from China, India, other Asian nations, much of Europe, and Canada. Still, the US remains a leader due to its level of knowledge creation, technological output, and its market and business sophistication. In the 2025 Global Innovation Index, the US ranked third behind only Switzerland and Sweden. The top innovation cluster metro area was Shenzhen, China, followed by Tokyo, San Jose-San Francisco, Beijing, and Seoul.^{iv}

Many intertwined factors must be addressed successfully for the United States and individual states to maintain or increase their tech industry competitiveness. Perhaps the most important of these is education and workforce development, with one observer citing “a shortage of trained workers at every education level across [key] technology sectors.”^v Other challenges:

- Manufacturing capacity and productivity
- Reconfiguring supply chains for reliability and efficiency
- The quality of research and development and speed to commercialization
- Investment capital availability.

The Oklahoma Technology Alliance, an affiliate of the Oklahoma State Chamber of Commerce and the Oklahoma State Chamber Research Foundation, brings together companies, organizations, and institutions that are interested in technology-related issues in the state. To help educate the public and key decision-makers on the economic benefits of actively embracing technology and research and development, the organization has committed to collect and publish statewide data on the tech sector. OTA has contracted with Economic Leadership LLC, a national consulting firm with a long history of evaluating state technology performance, to build a report that will evaluate the current state of the tech sector in Oklahoma.

To develop a full picture of the industry and its trends, Economic Leadership LLC collected a wide variety of data, conducted interviews with tech leaders in the state, and evaluated trends and best practices in other states. This report shows statistics for tech in 2025, the most recent year with final data. This report serves as a resource of data and trends for the economic development community, policy makers, and the tech industry.

Oklahoma's technology sector tells two stories at once. It is already an outsized contributor to the state's economy: tech jobs carry high wages, and for every job created in the tech industry, more than two additional jobs are created elsewhere, the highest multiplier effect of any industry in the state. At the same time, Oklahoma trails many states in the rate of growth of both tech industries and tech occupations, and lags on several of the investments, research funding, patents, venture capital, that convert today's tech presence into tomorrow's growth. This report documents both halves of that story and provides perspectives on a path forward.

Assessing Oklahoma's Technology Sector

In Section 1 of this report, the state of Oklahoma's technology industry is reviewed and compared to those of other states. The tech industry is defined as firms that operate in the tech space but may employ workers in non-tech roles (e.g., an accountant at Tenstreet or a lawyer at Enverus).

In Section 2 of the report, tech occupations are measured separately. Tech occupations refer to workers whose roles are tech-related and who may be employed at either tech-focused or non-tech-focused companies (e.g., a software engineer at Boeing or an IT professional at an insurance company). Throughout this report, the term "tech sector" is used to encompass both tech industries and tech occupations.



In Section 3 of this report, Oklahoma is also ranked on factors that influence the technology sector such as research & development, venture capital, business climate, and talent availability. These metrics are collectively defined as the "tech infrastructure." Reviewing these indicators provides policymakers with an understanding of the industry's current landscape, as well as takeaways that may help guide actions to support future growth.

Sections 4 summarizes the key takeaways and recommendations from a range of technology stakeholders from various sectors and parts of the state. Sections 5 and 6 look at what other states are doing to grow tech industries and tech occupations.

Throughout the report, Oklahoma's performance is compared to national trends as well as against the following peer and neighboring states as identified in consultation with the Oklahoma Technology Alliance:

Texas	New Mexico	Tennessee
Kansas	Missouri	Indiana
Colorado	Nebraska	Iowa
Arkansas	Arizona	

Finally, Section 7 of the report includes a summary of key takeaways for policy makers and officials who are working to grow the technology sector in Oklahoma.

About the Methodology

Economic Leadership identified 86 separate six-digit NAICS code industries to characterize the “Total Technology Industry” for Oklahoma and for comparison with other U.S. states. A full list of these industries is available in the appendix. These categories are based on several established definitions of the technology industry. The primary source was the TechAmerica Foundation’s Technology Industry Classification. Other state and city tech industry reports were also evaluated, and this report maintains a definition that is comparable with those sources.

The Total Technology Industry (hereafter referred to as the “tech industry”) was further broken down into four subcategories:

- Energy Technology
- Environmental Technology
- Life Sciences
- IT, Telecom, Hardware, and Software (Tech Core)

To calculate metrics and trends of the tech sector for employment, wages, and establishments, Economic Leadership LLC used data developed by Lightcast, which is largely based on the Bureau of Labor Statistics (BLS) Quarterly Census of Employment and Wages. Lightcast data fills in gaps from the BLS non-disclosure policy by amalgamating several economic data sources to provide the best estimates for the years 2001-2036. This allows for a more granular analysis of the tech sector.

The data presented in this report are based on Lightcast calculations for the year 2025, the most recent full year of data available. The federal government revises data several times each year, and these revisions can be significant. Final 2026 estimates will not be available until mid-2027. Most trend data in this report covers the five-year period from 2020 to 2025. This approach allows for the most accurate assessment of the tech industry because it incorporates final figures from public sources. Some data, such as unemployment and job postings, provide more real-time insight and are presented throughout the report.

To measure the total workers in tech occupations in Oklahoma across all industries, we reviewed 85 separate five-digit SOC codes across computer and engineering occupations. Data for the tech infrastructure state comparisons comes directly from publicly available resources such as the National Science Foundation, Bureau of Economic Analysis, and the US Census Bureau. This ensures consistent and comparable data across all the states.

SECTION 1 - THE OKLAHOMA TECH INDUSTRY

The review of Oklahoma’s technology industry found that in 2025 the industry employed 88,440 people, and workers earned about \$17 billion in income. The tech industry accounted directly for almost five percent of the total jobs in the state, but almost 11 percent of the state’s total earnings and about 15 percent of sales. In 2025, there were 12,240 technology establishments operating in Oklahoma. An establishment is any business location in the state with a payroll; a company can have multiple establishments in the region.

Oklahoma Technology Industry Summary Statistics, 2025

Indicator	Technology Industry	State Total	State Total Percentage
Employees	88,440	1,829,060	4.8%
Establishments	12,240	129,090	9.5%
Wages (millions)	\$16,890	\$160,450	10.5%
Sales (millions)	\$82,680	\$567,520	14.6%

Source: EL estimates based on Lightcast 2026.3

The industry also contributes heavily to the state’s tax revenue, exports, and gross domestic product (GDP). The tech industry accounts for over 32 percent of taxes paid within the state. In 2024, the tech industry contributed about 17 percent, \$47 billion, of gross state product (GSP).

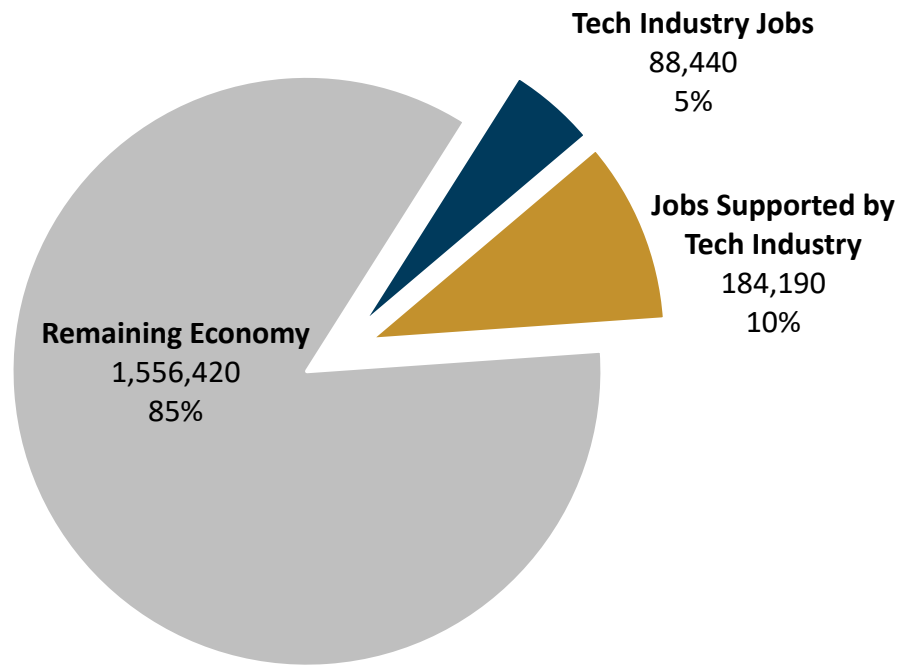
Oklahoma Technology Industry Economic Contributions, 2025

Indicator	Technology Industry	State Total	State Total Percentage
Taxes Paid (millions)	\$5,940	\$18,470	32.2%
Exports (millions)	\$54,080	\$328,000	16.5%
GSP (millions)	\$46,830	\$275,680	17.0%

Source: EL estimates based on Lightcast 2026.3

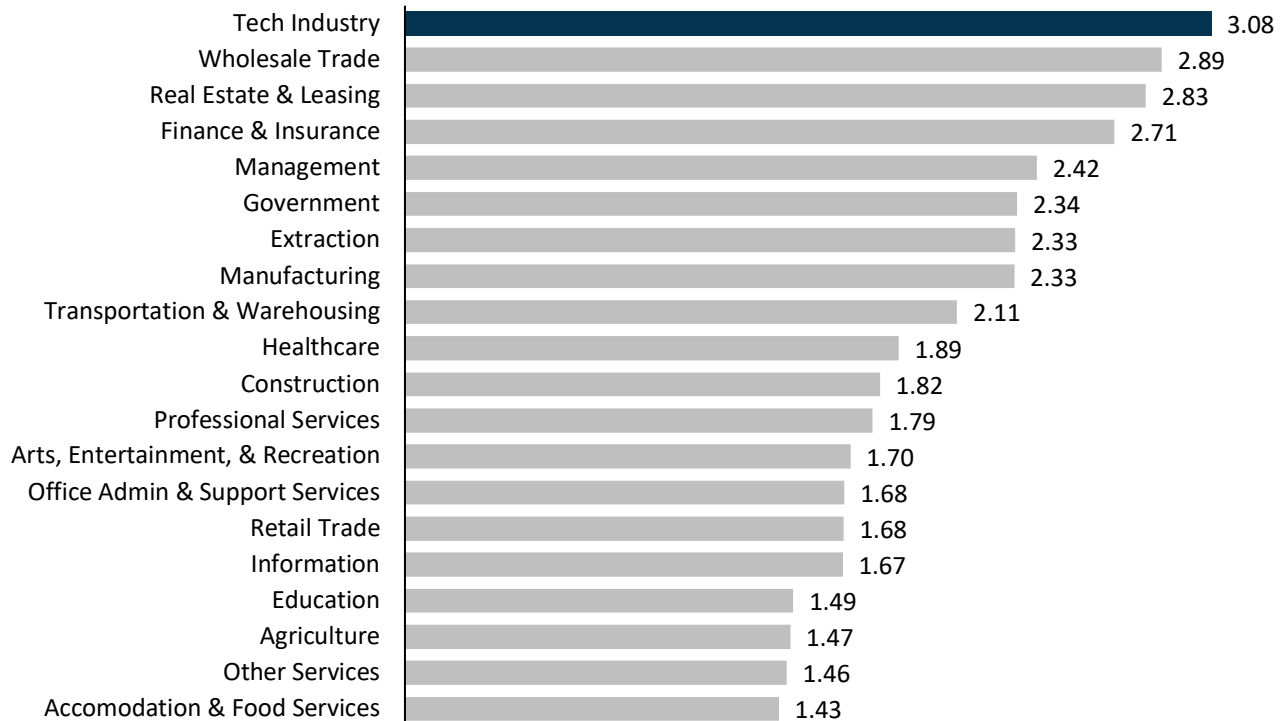
The presence of the tech industry also helps generate activity in other sectors of the economy. In 2025, the tech sector in Oklahoma had a job multiplier of 3.08, meaning that for every job created in the tech sector, more than two additional jobs were created or supported elsewhere in the economy. This was the highest job multiplier effect across all industries in the state. Accounting for these multiplier effects increases the tech sector’s overall employment impact from five percent to 15 percent. In 2025, an estimated 184,190 workers in Oklahoma were supported by the tech industry through supply chain impacts or tech workers spending their earnings.

Tech Industry Contribution to Oklahoma's Economy, 2025



Source: EL calculations based on Lightcast 2026.3

Oklahoma Job Multiplier by Industry, 2025



Source: EL calculations based on Lightcast 2026.3

Tech Sub-Categories

The tech industry was further evaluated by breaking it down into four sub-categories:

- Energy Technology
- Environmental Technology
- Life Sciences
- IT, Telecom, Hardware, and Software (IT)

The Information Technology (IT) group includes industries related to hardware manufacturing, software services, social media, telecommunications, and other computer-related services. Energy Technology includes industries involved in fossil fuel and renewable power operations. Environmental Technology encompasses industries related to electrification, batteries, environmental consulting, and waste remediation services. Life Sciences includes industries engaged in pharmaceutical manufacturing and research and development in biotechnology.

Employment concentration ratios help illustrate how strongly an industry is represented within a regional economy. Values greater than 1.00 indicate that the industry is more concentrated locally than the national average and represents a significant part of a state's economic base. Industries with high concentration often drive a region's exports and wealth creation. Overall, the share of workers in Oklahoma's tech industry is smaller than the national average. The presence of energy tech jobs in the state, however, is over three times more concentrated than the national average. This high level of concentration demonstrates the unique role the energy sector plays in Oklahoma's economy.

Oklahoma's Technology Industry by Sub-Categories, 2025

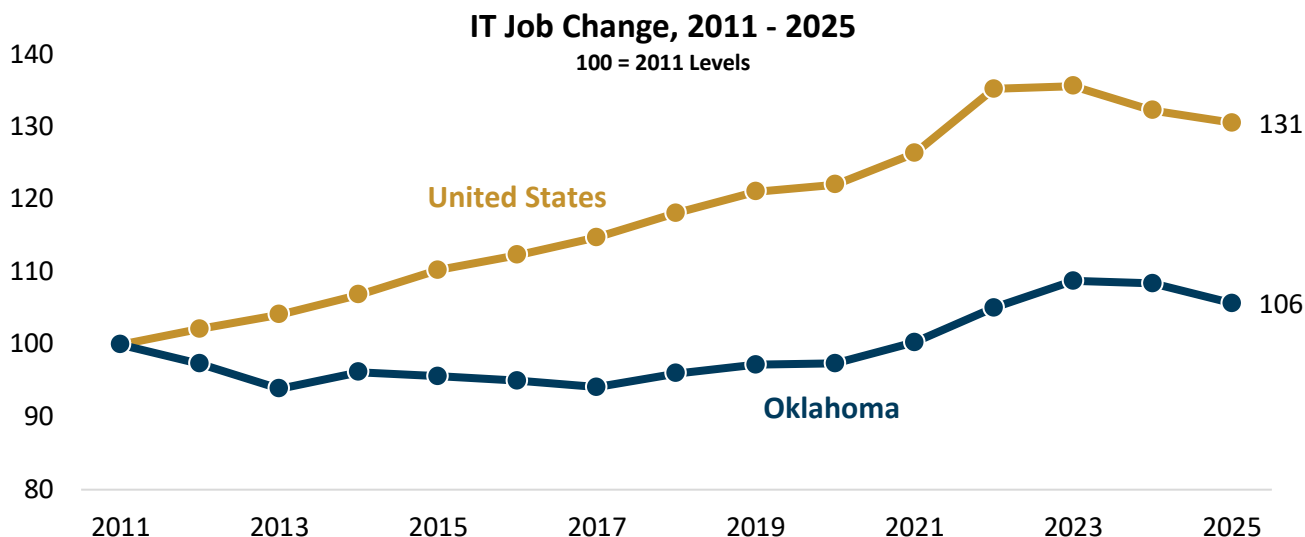
Technology Categories	Employment, 2025	Employment Change, 2024-2025	Employment Change, 2020-2025	Establishments, 2025	Job Concentration
Energy Tech	36,980	-4.9%	-6.8%	2,880	3.26
Environmental Tech	7,700	2.1%	18.5%	760	0.80
Life Sciences	15,430	3.6%	8.9%	2,370	0.43
IT	28,330	-2.5%	8.5%	6,230	0.47
TOTAL TECH	88,440	-2.2%	2.3%	12,240	0.76

Source: EL estimates based on Lightcast 2026.3

Note: Some values may not add to the exact total due to rounding.

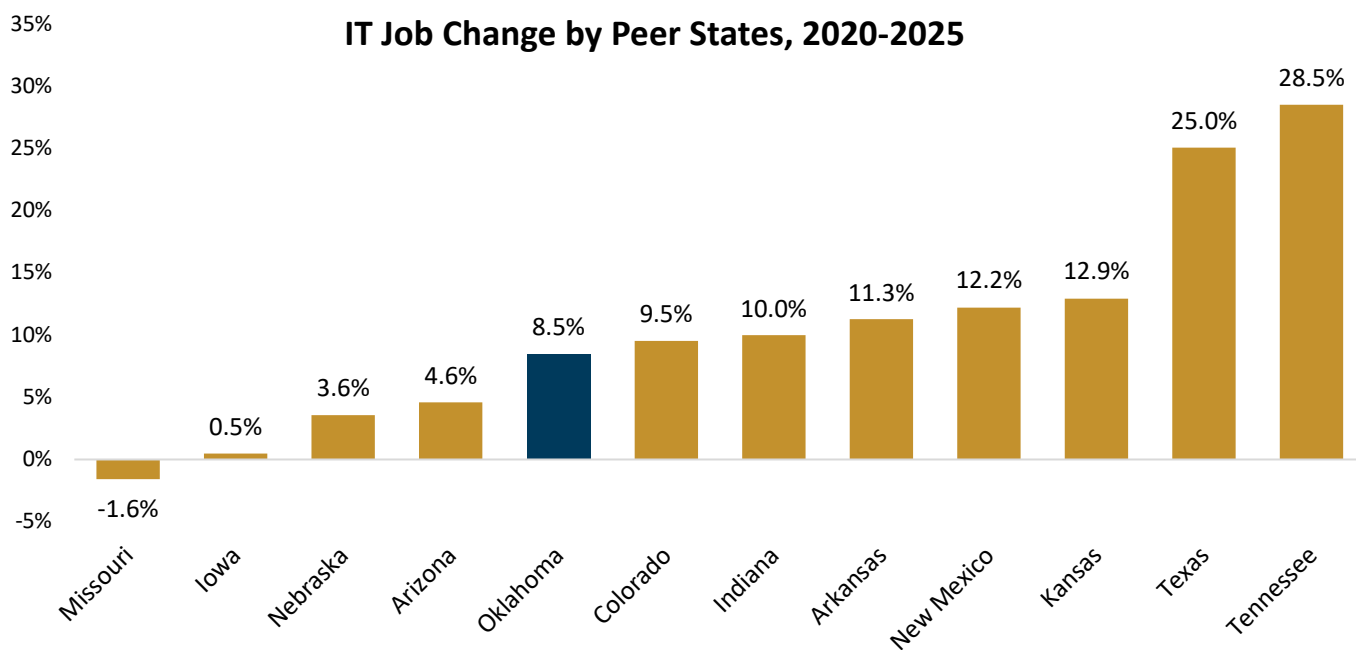
Five-year job change has been strong in all subcategories except energy tech. This trend is consistent with national trends where jobs in fossil fuel extraction are declining and renewable energy employment growth has been robust but not at a large enough scale to offset the losses.

The IT sub-category accounts for 32 percent of the jobs in the tech industry. From 2024-2025, job change was negative. This is consistent with national trends, as venture funding and consumer demand slowed after the Federal Reserve began raising interest rates to combat inflation. This has hit the IT sector the hardest. From 2023 to 2025, the national average change rate in employment was a decline of 3.7 percent. Oklahoma experienced a less severe decline of 2.8 percent. Only ten states experienced net positive growth in IT jobs in this timeframe.



Source: EL calculations based on Lightcast 2026.3

Oklahoma’s rate of IT job growth between 2020-2025 exceeded that of four peer states but lagged Colorado, Indiana, Arkansas, New Mexico, Kansas and was far below that of Texas or Tennessee.

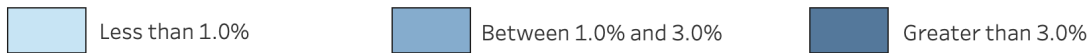


Source: EL calculations based on Lightcast 2026.3

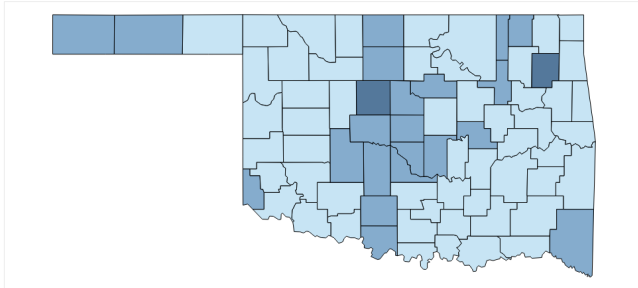
TECH INDUSTRY LOCATION

Different parts of the state have different specialties within the tech industry. While IT industry jobs are very strong in the urban centers of the state, energy jobs are most concentrated in the western portion of the state. Only a handful of counties in the state have high shares of environmental or life sciences jobs.

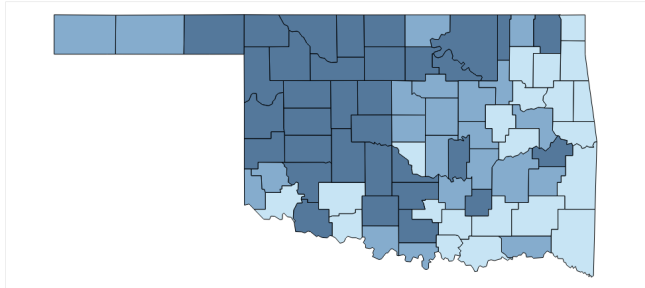
Tech Industry Share of Total Jobs, 2025



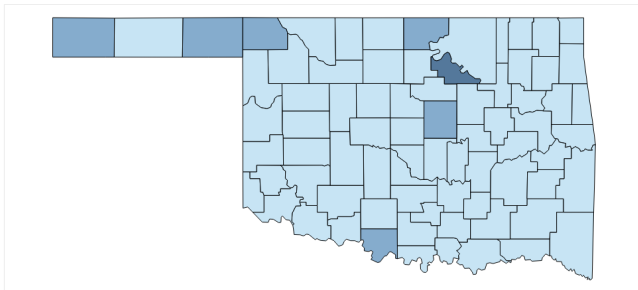
IT



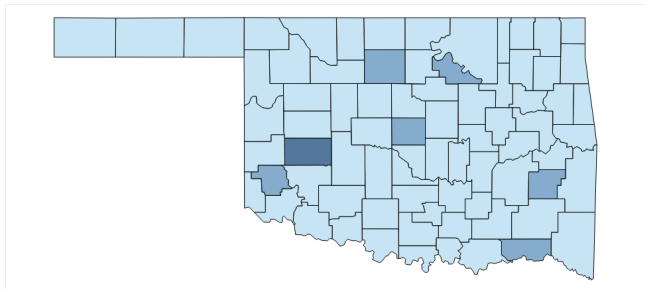
Energy



Environmental



Life Sciences



Source: EL calculations based on Lightcast 2026.3

The tech industry can also be evaluated by whether jobs and establishments are involved in tech services or in the production of tech goods. These categories are referred to as output groups. In Oklahoma, most of the tech industry was involved in providing tech services. Tech manufacturing is not highly concentrated in the state and jobs have been declining in recent years. There has been job growth in semiconductor and electronic components manufacturing in the last five years, but these have not been enough to offset losses in hardware or life science manufacturing industries.

Oklahoma's Tech Industry by Output Categories, 2025

Technology Output Categories	Employment, 2025	Employment Change, 2024-2025	Employment Change, 2020-2025	Establishments, 2025	Job Concentration
Tech Services	82,840	-2.1%	2.6%	11,980	0.85
Tech Manufacturing	5,590	-3.2%	-2.0%	260	0.29
TOTAL TECH	88,440	-2.2%	2.3%	12,240	0.76

Source: EL estimates based on Lightcast 2026.3

TECH INDUSTRY EARNINGS

Employees within technology companies in Oklahoma earn high incomes, on average. The average earnings per worker in the tech industry were \$134,200 in 2025. The average earnings for workers across all industries in the state was about \$72,300. On average, a tech industry worker earns roughly 1.9 times more than most workers in the state. This earnings metric includes all the wages, salaries,

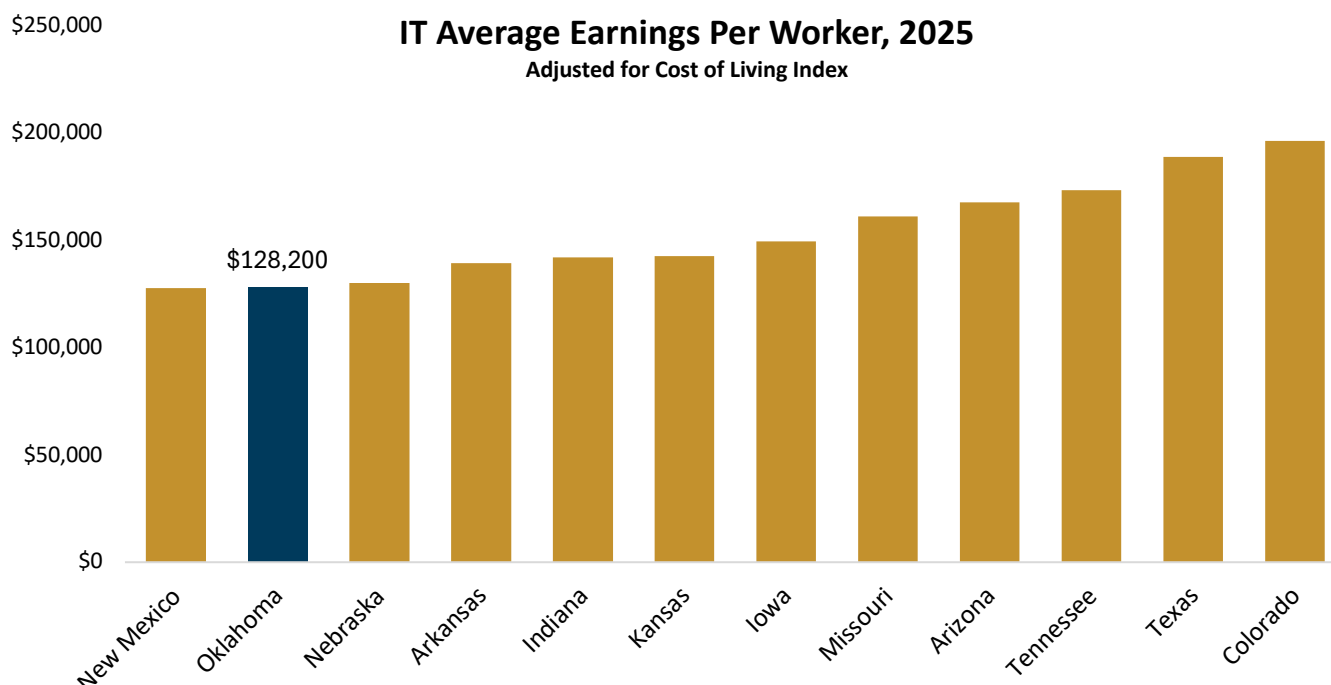
and supplements received by a worker. Supplements on average, which include employee benefits, accounted for about \$24,300 of a tech industry worker’s earnings in Oklahoma.

Tech earnings in Oklahoma remain low compared to the national averages. This is both a positive and a negative competitive factor: lower wages can attract businesses relocating from higher-cost regions, but they can also make it more difficult to recruit talent to move to the state. Oklahoma had the 8th lowest cost of living index in 2025 (see chart on pg.48). While wages may not be as high compared to other tech markets, a dollar in Oklahoma stretches farther. When this purchasing power is accounted for, Oklahoma’s wages become more competitive but the best talent can likely find higher earnings in other states, particularly at IT companies. The highest tech industry wages and most competitive earnings are found in energy tech.

Average Annual Earnings per Worker by Sub-Industry, 2025

Technology Categories	Oklahoma	Oklahoma (Cost of Living Adjusted)	National Average
Energy Tech	\$161,700	\$173,600	\$186,500
Environmental Tech	\$86,200	\$92,600	\$106,900
Life Sciences	\$119,400	\$128,200	\$169,700
IT	\$119,300	\$128,200	\$224,600
All Categories	Oklahoma	Oklahoma (Cost of Living Adjusted)	National Average
Tech Services	\$135,300	\$145,400	\$196,900
Tech Manufacturing	\$116,500	\$125,200	\$181,800
TOTAL TECH INDUSTRY	\$134,200	\$144,100	\$194,400

Source: EL estimates based on Lightcast 2026.3



Source: EL calculations based on Lightcast 2026.3

Super Sub-Industries

Tech industries were divided into more detailed groupings called super sub-industries. This breakdown shows that software services remain a significant driver of tech industry growth in the state, employing 14,110 workers. Jobs in this group have grown by 32 percent from 2020 to 2025. Key core tech groups, including electronics hardware manufacturing and internet, social media, and telecommunications experienced net job decline during this time. The large growth in renewable energy has been primarily driven by a net increase of 170 jobs in the wind energy industry.

Oklahoma's Tech Industry by Super Sub-Industries, 2025

Subsectors	2025 Employment	Employment Change (2020-2025)	Job Concentration
Other Energy and Power Generation	36,460	-7.4%	3.35
Software	14,110	31.9%	0.41
Internet, Social Media, & Telecom	11,850	-8.9%	0.72
Engineering, Environmental, & Clean Tech	10,950	10.8%	0.64
R&D and Testing	5,250	2.3%	0.38
Remediation and Waste Management	5,050	30.9%	0.86
Electronics Hardware	2,370	-1.2%	0.26
Life Sciences Manufacturing	1,890	4.6%	0.23
Renewable Energy	520	75.1%	1.18
TOTAL TECH SECTOR	88,440	2.3%	0.76

Source: EL estimates based on Lightcast 2026.3

State Comparison of Tech Industry Metrics

Using the same methods applied to Oklahoma’s tech industry, comparable metrics were calculated for the remaining states and the District of Columbia to assess how Oklahoma’s tech trends compare nationally. The District of Columbia is included in the charts but excluded from the state rankings. This section of the report evaluates many of the metrics presented in previous section, comparing Oklahoma’s performance with national values and with other states. It first examines metrics for the total tech industry and then presents state comparisons for the four subcategories. Tech occupation data is addressed in a later section.

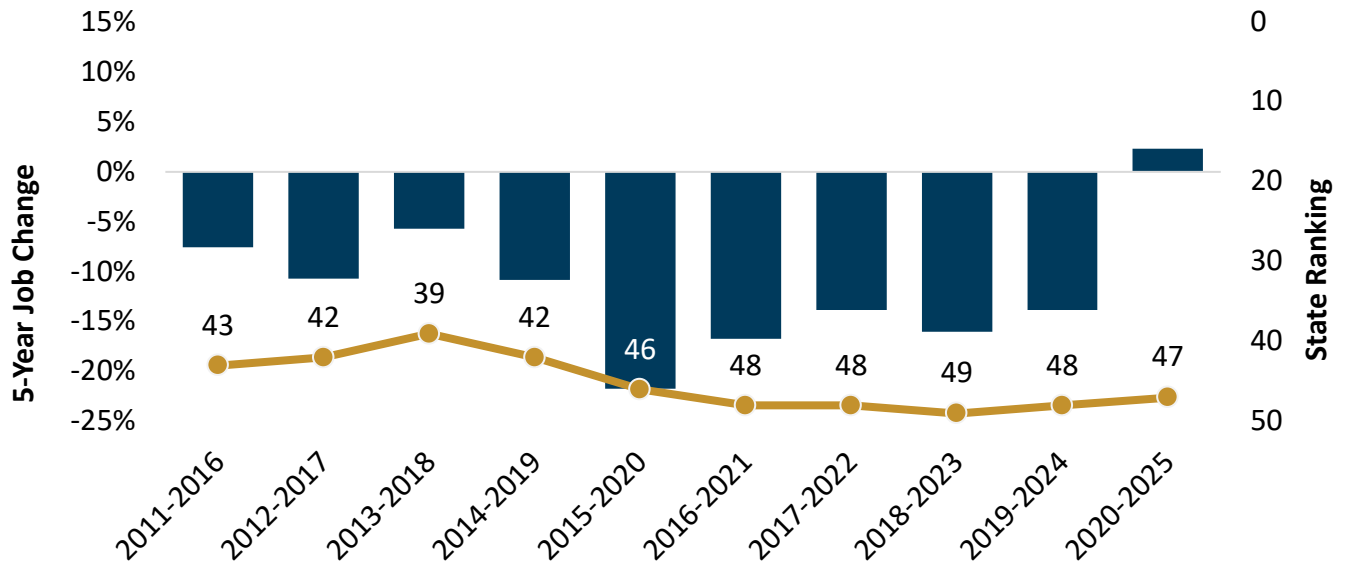
Comparing Oklahoma with other states helps place the state’s performance in context. The following charts list all metrics measured for Oklahoma’s tech sector and its corresponding ranking among the states.

	Indicates a state ranking of 15 th or higher
	Indicates a state ranking between 16 th and 35 th
	Indicates a state ranking of lower than 35 th

Oklahoma’s rankings for the total tech sector were all in the bottom half of states. This is largely due to major losses in the energy tech subsector pulling down net job change. The historical five-year job change chart displays how net job change has largely been negative and how the state has ranked in the bottom group of states. However, job growth did turn net positive in the most recent five-year period. Oklahoma’s ranking improved only slightly because other states had much stronger growth during this same time period. Oklahoma’s average earnings for tech workers scored better with a ranking of 27th. The lower cost of living in the state helps keep earnings competitive.

Total Tech Industry			
Metric	OK	US	OK Rank
Technology Sector Employment Concentration (2025)	0.76	1.00	36
Technology Sector Employment Change (2020-2025)	2.3%	10.1%	47
Expected Technology Sector Employment Change (2026-2031)	-2.1%	6.3%	49
Annual Wage for Tech Sector Employees with Purchasing Power (2025)	\$144,100	\$194,400	27

Oklahoma Total Tech 5-Year Job Change by Percentage and State Ranking



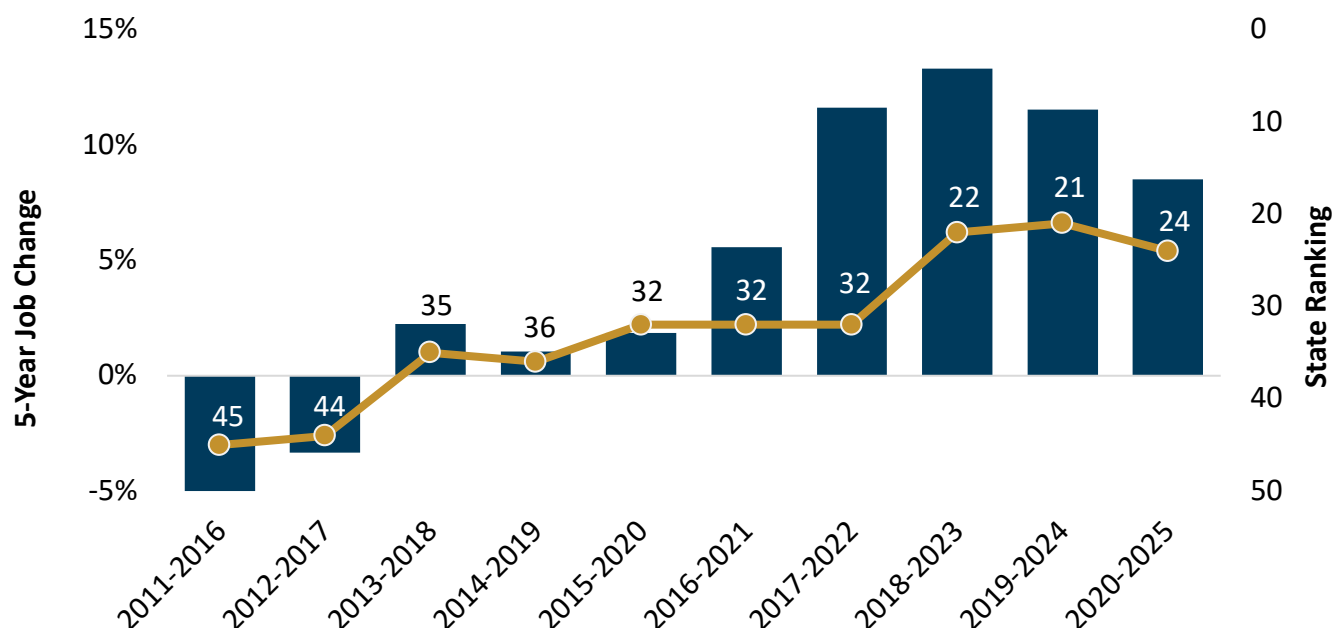
Source: EL calculations based on Lightcast 2026.3

IT Industry Subcategory

Next, the IT subcategory was compared with those of other states. This group of industries represents the high-tech core, including hardware manufacturing, internet services, data storage, telecommunications, and software companies. In 2025, Oklahoma's IT subcategory was 53 percent less concentrated than the national average, with a job concentration of 0.47. While low in concentration, Oklahoma's five-year historical job change in IT was strong and among the top half of states. The state has improved its ranking in IT job change over the last ten years.

IT Industry			
Metric	OK	US	OK Rank
IT Employment Concentration (2025)	0.47	1.00	43
IT Employment Change (2020-2025)	8.5%	7.0%	24
Expected IT Employment Change (2026-2031)	5.3%	7.6%	35
Average Annual Wage for IT Employees with Purchasing Power (2025)	\$128,200	\$224,600	22

Oklahoma IT 5-Year Job Change by Percentage and State Ranking

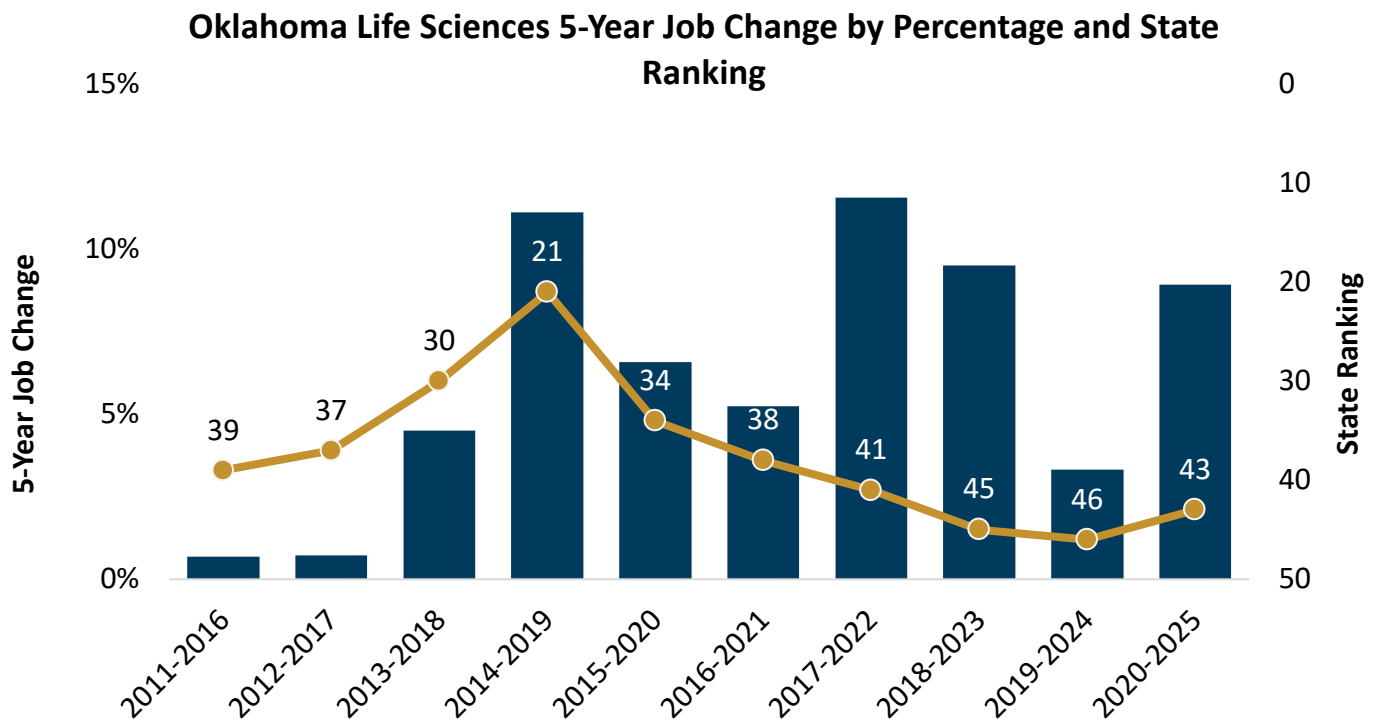


Source: EL calculations based on Lightcast 2026.3

Life Sciences Industry Subcategory

Life Sciences is not as concentrated in Oklahoma as it is in many other states, but its growth rate has been strong. Life Sciences jobs expanded by 8.9 percent over the last five years. However, this growth ranked 43rd nationally because many other states experienced growth rates above 30 percent during the same period. Despite consistent job growth in this subcategory, Oklahoma's growth has been on the lower end compared to other states.

Life Sciences Industry			
Metric	OK	US	OK Rank
Life Sciences Employment Concentration (2025)	0.43	1.00	48
Life Sciences Job Change (2020-2025)	8.9%	15.4%	43
Expected Life Sciences Job Change (2026-2031)	3.3%	5.3%	41
Average Earnings for Life Sciences Employees with Purchasing Power (2025)	\$128,200	\$169,700	32



Source: EL calculations based on Lightcast 2026.3

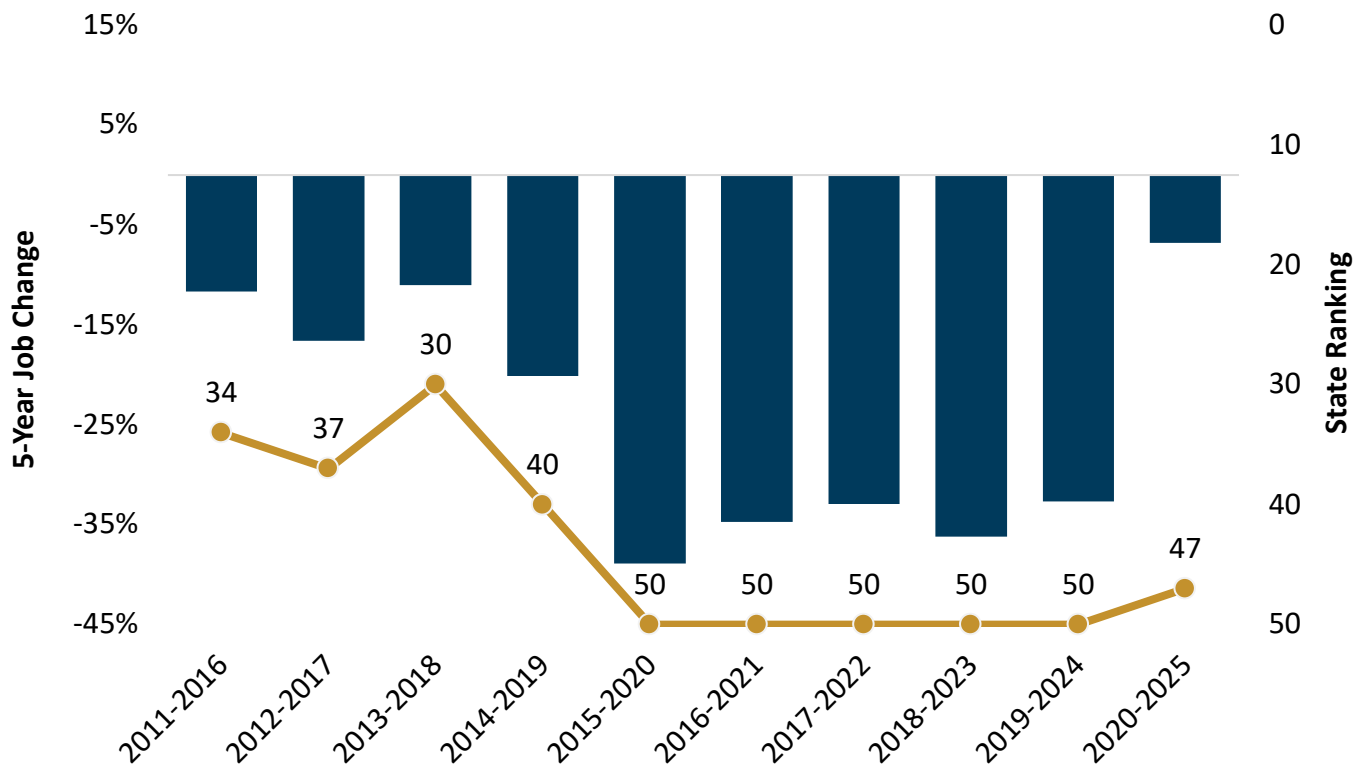
Energy Tech Industries Subcategory

The Energy Tech subcategory represents the largest portion of Oklahoma’s tech economy and is over three times more concentrated than the national average in terms of employment. While this was the 6th highest energy tech concentration in the country in 2025, Oklahoma has seen a decline in the oil and gas segment of the energy tech economy over recent years. As an energy leader in the country, Oklahoma also ranks among the top 20 states for energy tech worker earnings.

While this category of jobs has declined both in the state and nationally, renewable energy employment in Oklahoma is expanding. Over the last five years, the state has added 224 jobs in solar, biomass, and wind generation. Energy tech has also become increasingly linked to the core IT segment of the industry as demand for data centers has surged amid the AI boom. Data centers require large amounts of reliable energy to operate and many companies are looking to generate power onsite for their energy needs.

Energy Tech Industry			
Metric	OK	US	OK Rank
Energy Tech Employment Concentration (2025)	3.26	1.00	6
Energy Tech Job Change (2020-2025)	-6.8%	6.6%	47
Expected Energy Tech Job Change (2026-2031)	-12.6%	2.3%	50
Average Annual Wage for Energy Tech Employees with Purchasing Power (2025)	\$173,600	\$186,500	19

Oklahoma Energy Tech 5-Year Job Change by Percentage and State Ranking



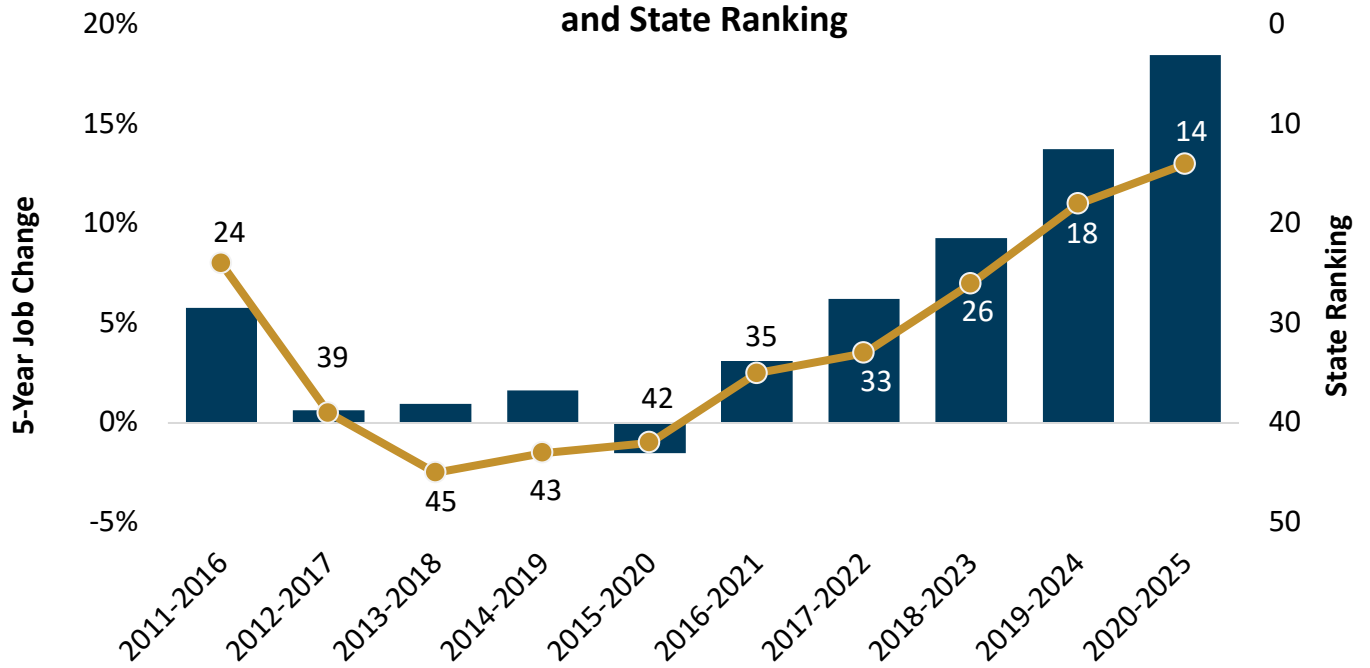
Source: EL calculations based on Lightcast 2026.3

Environmental Tech Industry Subcategory

Environmental Tech is another emerging subcategory for Oklahoma. Growth in this subcategory is being driven by recycling services and environmental consulting services. The five-year growth rate was the 14th highest in the nation. Oklahoma's ranking for this metric has steadily improved over time. The subcategory is also dominated by a manufacturing industry: instruments for measuring, displaying, and controlling industrial process variables. These smart meters help improve efficiency in water and energy use across a variety of use cases.

Environmental Tech Industry			
Metric	OK	US	OK Rank
Environmental Tech Employment Concentration (2025)	0.80	1.00	43
Environmental Tech Job Change (2020-2025)	18.5%	15.5%	14
Expected Environmental Tech Job Change (2026-2031)	7.2%	6.6%	20
Average Annual Wage for Enviro Tech Employees with Purchasing Power (2025)	\$92,600	\$106,900	33

Oklahoma Environmental Tech 5-Year Job Change by Percentage and State Ranking



Source: EL calculations based on Lightcast 2026.3

SECTION 2 - TECH OCCUPATIONS IN OKLAHOMA

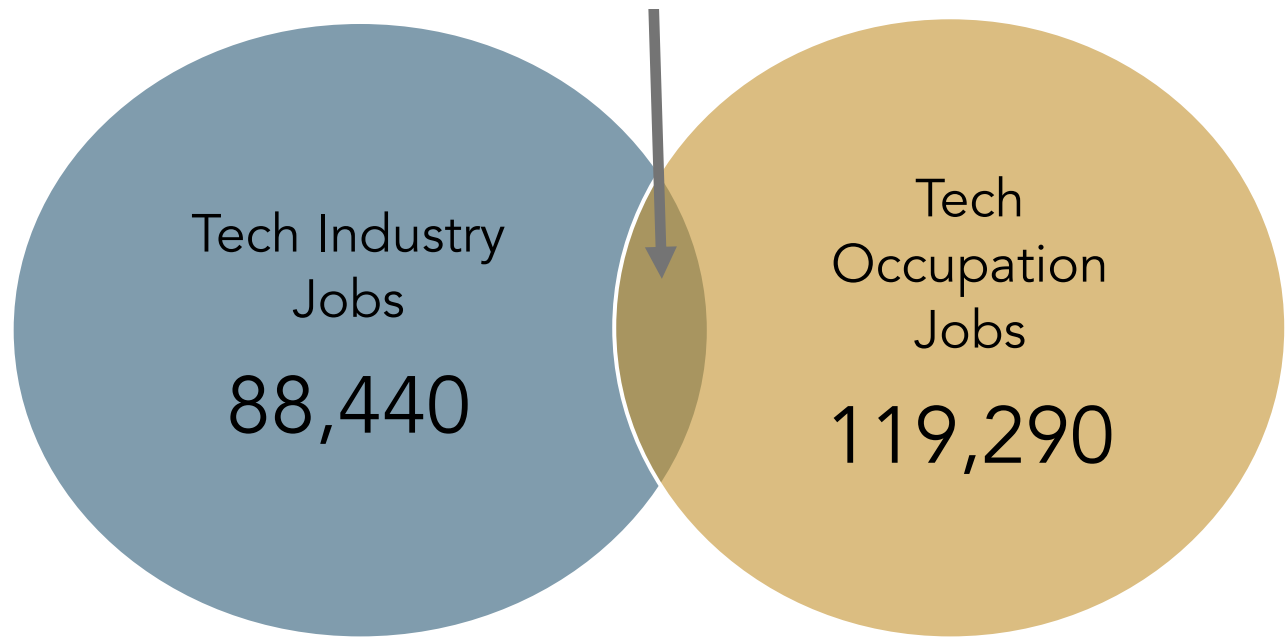
Technology workers today are present in virtually every industry. As technology has permeated most businesses and become increasingly important to company competitiveness, industries such as banking, media, and health care now employ larger numbers of tech workers. To estimate the number of tech occupations that exist across all industries, we reviewed 85 separate five-digit Standard Occupational Classification (SOC) codes, focusing primarily on STEM-driven roles. A complete list is included in the appendix.

Using this methodology, the data show that 119,290 workers in Oklahoma are employed in tech occupations. This number is higher than the 88,440 workers employed directly by the tech industry, indicating that a significant share of tech occupations exist outside traditional technology companies. In fact, only about 22 percent of tech occupation jobs in the state are located at tech industry firms. The remaining tech workers are employed across other industries, from manufacturing to finance.

Computer user support specialists are the largest occupation within the tech workforce, accounting for over eight percent of tech workers. Each year, an average of 14,810 tech jobs must be filled in Oklahoma to accommodate growth and retirements. The median annual wage for tech workers is \$87,700, and tech jobs in the state have grown by 18 percent over the past five years.

Staffing Patterns of Tech Industries and Tech Occupations, 2025

22% of tech occupation jobs are employed in tech industries.



Source: EL calculations based on Lightcast 2026.3

Top Tech Occupations in Oklahoma, 2025

Description	2025 Occupations	Change in Employment, 2020-2025	Median Annual Wage	Annual Openings
Computer User Support Specialists	9,900	+43%	\$52,000	1,120
Software Developers	7,210	+17%	\$118,100	640
Market Research Analysts	6,850	+10%	\$61,900	820
Management Analysts	6,060	+37%	\$99,400	780
Logisticians	4,310	+18%	\$86,600	520
Computer Systems Managers	3,990	+28%	\$137,300	420
Computer Systems Analysts	3,870	-3%	\$95,900	330
Computer Systems Administrators	2,760	-1%	\$84,000	220
Mechanical Engineers	2,360	+11%	\$101,900	210
Industrial Engineers	2,200	+7%	\$97,510	210
Engineering Managers	2,140	+6%	\$157,330	210
Electrical Engineers	2,060	+19%	\$107,770	210
Computer Network Support Specialists	2,000	-6%	\$78,750	180
Information Security Analysts	1,920	+87%	\$94,000	270
All Tech Occupations	119,290	+18%	\$87,700	14,810

Source: EL estimates based on Lightcast 2026.3

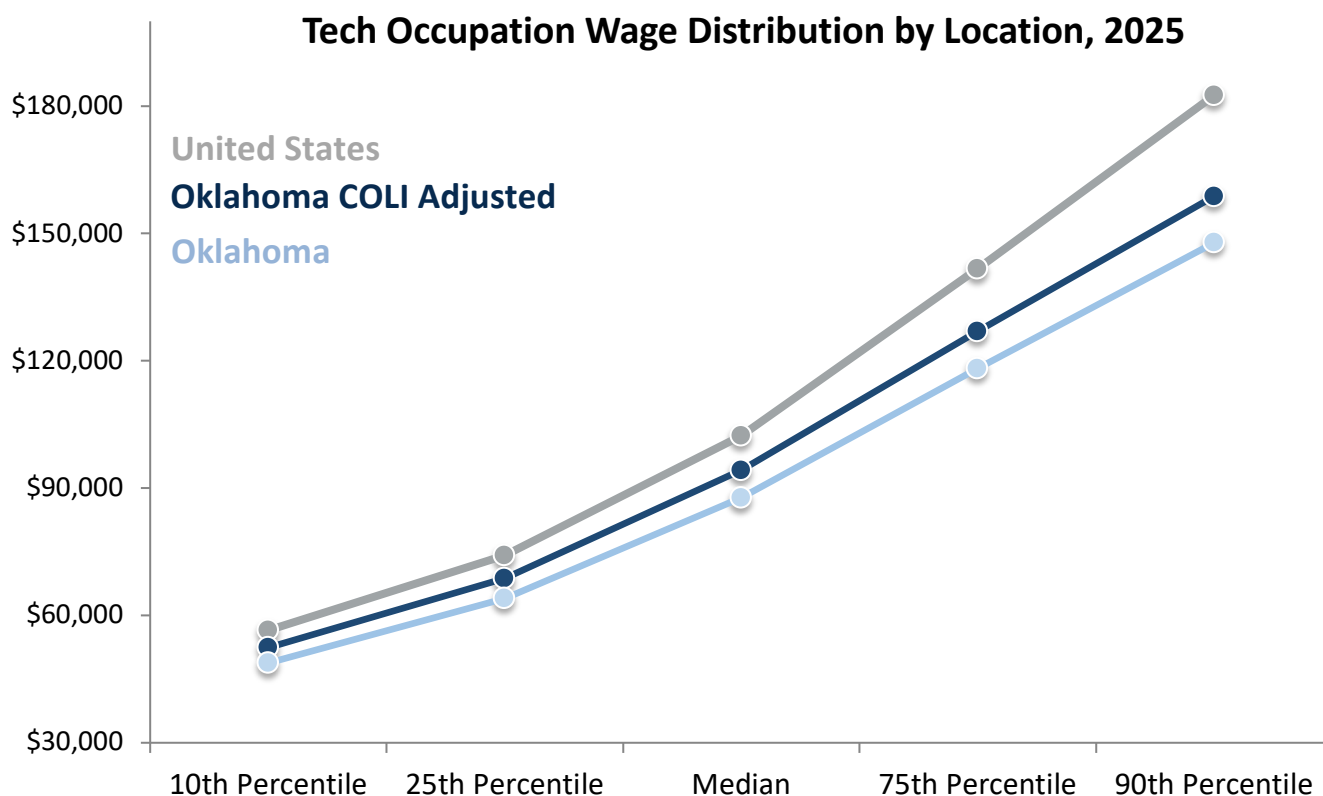
Tech jobs are growing at high rates in the Oklahoma economy. Workers who have skills in analyzing data and cybersecurity are in high demand across a variety of industries.

Top Five Tech Occupations in Growth

Top Five in Net Job Growth		Top Five in Growth Percentage	
Computer User Support Specialists	+2,960	Nuclear Technicians	+126%
Management Analysts	+1,630	Database Architects	+114%
Software Developers	+1,060	Mechanical Engineering Technicians	+112%
Information Security Analysts	+900	Calibration Technicians	+106%
Data Scientists	+730	Information Security Analysts	+87%

Source: EL estimates based on Lightcast 2026.3

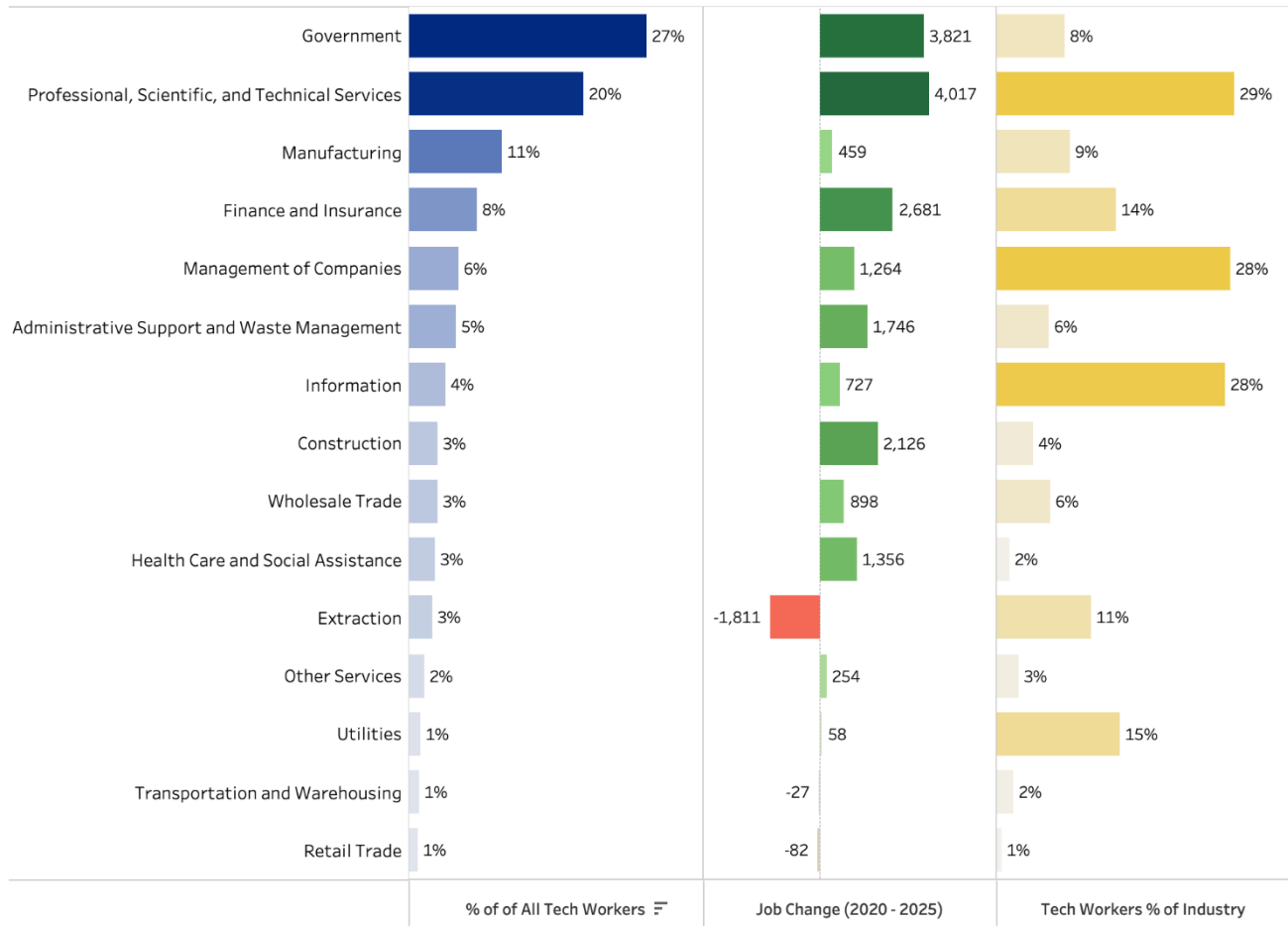
While median earnings for a tech occupation are \$87,700, actual wages vary widely by industry and experience. Workers in the lowest percentile earn about \$48,800, while those in the highest percentile earn roughly \$147,800 per year. In general, tech workers can earn more for their skills in other parts of the country. However, Oklahoma's wages become more competitive with national averages when cost of living is considered. After several years of elevated inflation and sharply rising housing prices in many markets, affordability has become a key factor in job selection. For the highest-skilled positions, however, the state remains less competitive on wages.



Source: EL calculations based on Lightcast 2026.3

As noted earlier, tech occupations exist across many different industries. The chart below shows which two-digit industries employ tech workers in Oklahoma. The majority of the top industries employing tech workers have seen their net number of tech workers rise in recent years. Beyond tech industry firms, tech workers are also present and growing strongly in manufacturing, finance, government, and construction firms. About 14 percent of all jobs in the finance and insurance industries are tech occupations. Tech workers now account for nine percent of employment in the manufacturing industry as production becomes more automated and integrated.

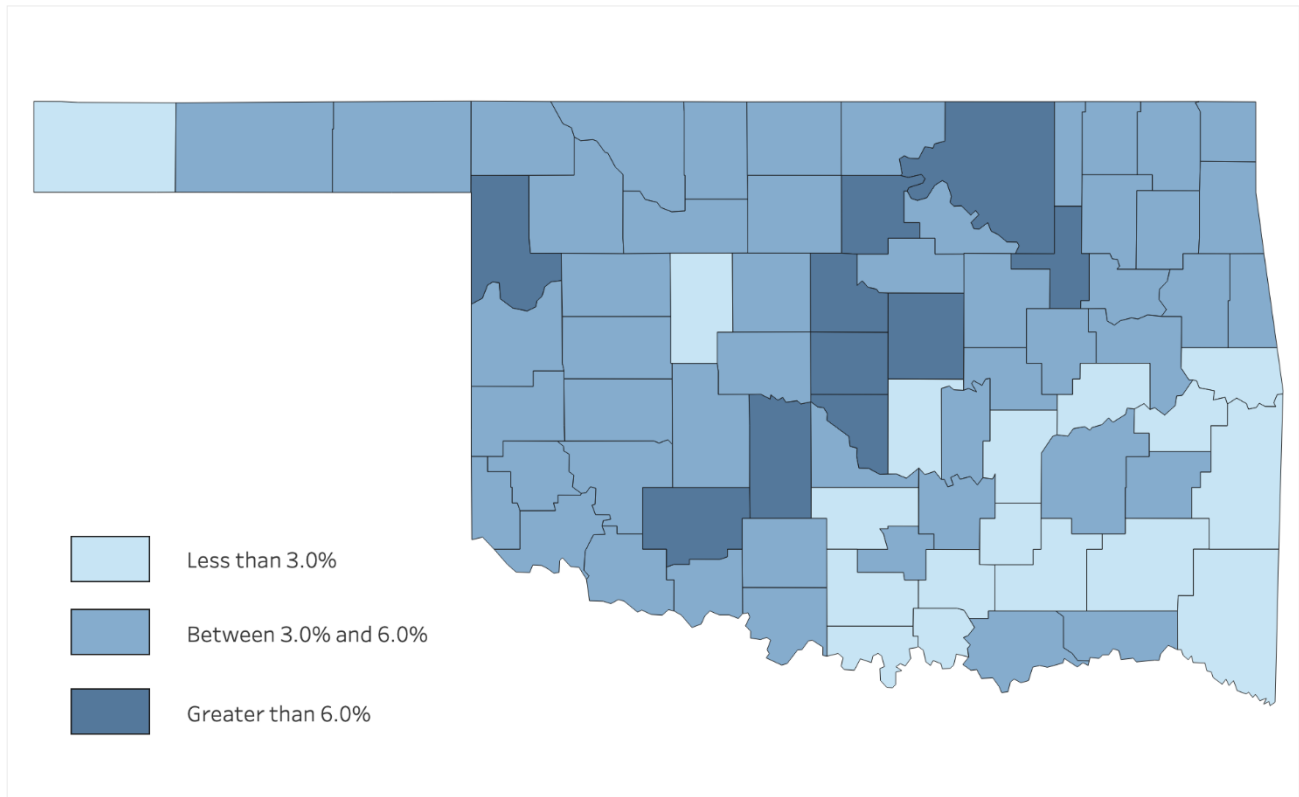
Top Industries Employing Tech Workers, 2025



Source: EL calculations based on Lightcast 2026.3

Like IT jobs, tech occupations are strongly concentrated in the more urban counties in Oklahoma. The Oklahoma City and Tulsa metros host the highest numbers of tech workers in the state. Comanche County is home to the U.S. Army base at Fort Sill and a strong presence of manufacturing and distribution industries. This results in high concentrations of scientists, analysts, logisticians, and cybersecurity professionals. Ellis County is another rural county with a higher share of tech workers. This is largely attributed to the oil and gas companies in the region employing engineers and scientists for their extraction operations.

Tech Occupations Share of Total Jobs, 2025



Source: EL calculations based on Lightcast 2026.3

To understand the demographic distribution within tech occupations, the percentage of workers in each group was compared to that group's share of Oklahoma's overall population. This produces an index value in which 100 indicates equal representation in tech occupations relative to the state population. Index values below 100 indicate underrepresentation, while values above 100 indicate overrepresentation. Looking first at gender demographics, women account for just over one-third of tech occupations while representing just over one-half of Oklahoma's population.

Gender Distribution of Tech Occupations in Oklahoma, 2025

Demographic	Tech Occupations	OK Population	Index
Women	35.0%	50.2%	69.6
Men	65.0%	49.8%	130.7

Source: EL calculations based on Lightcast 2026.3

In Oklahoma, about 70 percent of tech workers are white. This value is about eight percentage points higher than the share of white residents in the state's overall population. In many other states, white workers tend to be even more overrepresented in tech occupations. Asian and multiracial workers are well represented in Oklahoma's tech workforce, while other groups of color have index scores below 100, indicating underrepresentation. For example, Oklahoma has a large share of Native American residents, but this group is underrepresented in the tech workforce. As the tech market

continues to grow in the state, it is important that all communities have opportunities to participate and benefit.

Race/Ethnicity Distribution of Tech Occupations in Oklahoma, 2025

Demographic	Tech Occupations	OK Population	Index
White	69.6%	61.5%	113.2
Hispanic or Latino	7.1%	13.8%	51.6
Two or More Races	6.8%	6.2%	110.1
Black or African American	6.4%	7.5%	85.4
Asian	6.2%	2.7%	228.3
American Indian or Alaska Native	3.7%	8.1%	46.0
Native Hawaiian or Other Pacific Islander	0.1%	0.2%	44.8

Source: EL calculations based on Lightcast 2026.3

The age distribution of the tech workforce was also compared with that of the overall workforce. Tech occupations tend not to rely on the very young but have higher concentrations of young and middle-aged workers. Compared to the statewide workforce, tech occupations employ fewer older workers. This group still represents about 20 percent of tech jobs in Oklahoma and is at risk of increasing retirements in the coming years. Companies and workforce stakeholders will need to plan for replacing these workers' skill sets in the future.

Age Distribution of Tech Occupations in Oklahoma, 2025

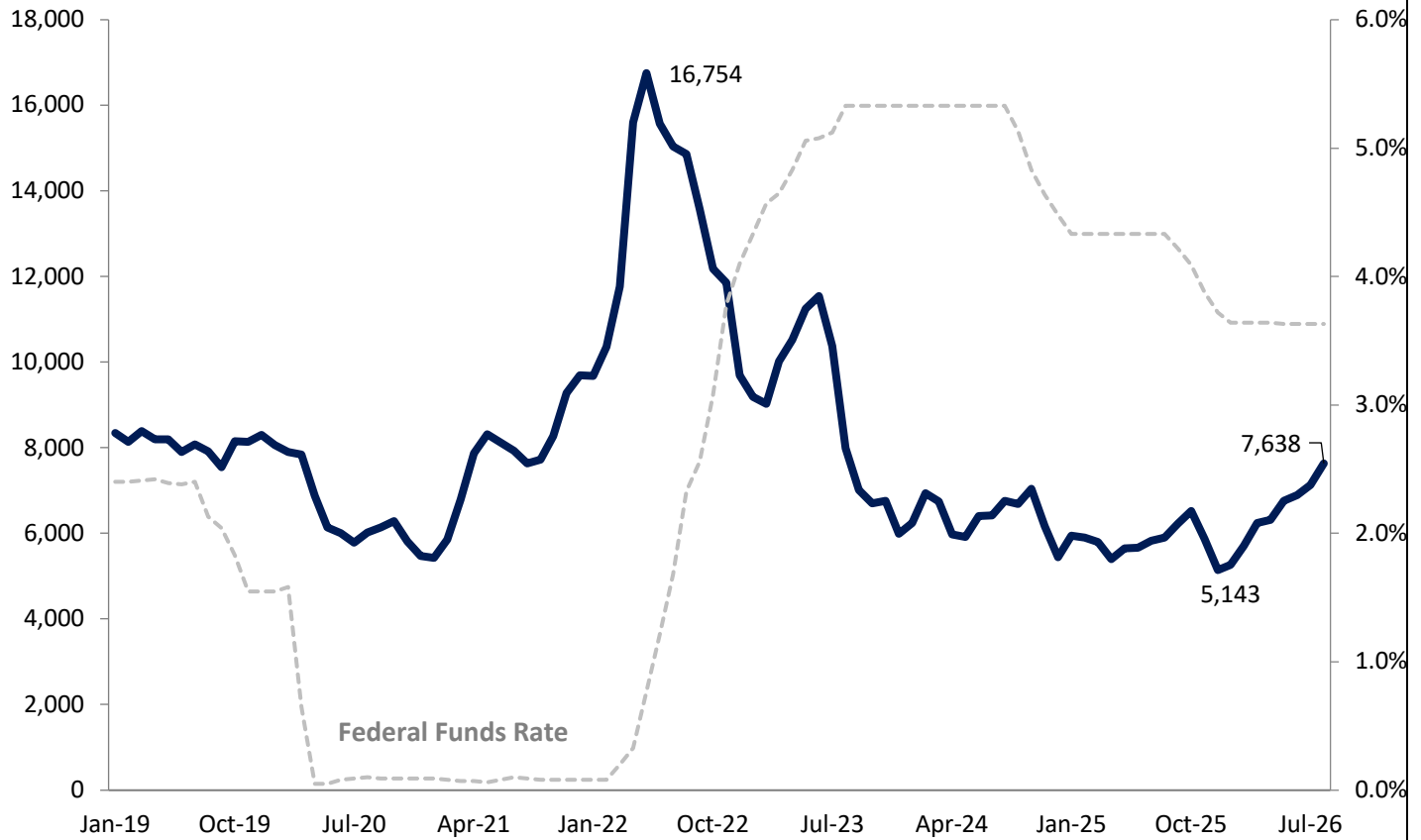
Demographic	Tech Occupations	OK Workforce	Index
Age 24 and Younger	6.8%	15.5%	43.7
Age 25 to 34	25.3%	21.9%	115.8
Age 35 to 44	26.9%	22.0%	122.3
Age 45 to 54	20.6%	18.6%	110.7
Age 55 and Older	20.4%	22.1%	92.6

Source: EL calculations based on Lightcast 2026.3

Workforce Demand and Supply

This report found that while tech companies have reduced their headcounts, other industries continue to hire tech workers. Although demand for tech talent is not as strong as it was during the post-pandemic peak, online job postings for tech occupations are rising in the state in recent months. The number of unique job postings in July 2026 (7,340) was the highest recorded since August 2023. Even tech companies that are downsizing in one department may still need tech talent for other divisions or to replace departing employees.

Monthly Unique Job Postings for Tech Occupations in Oklahoma

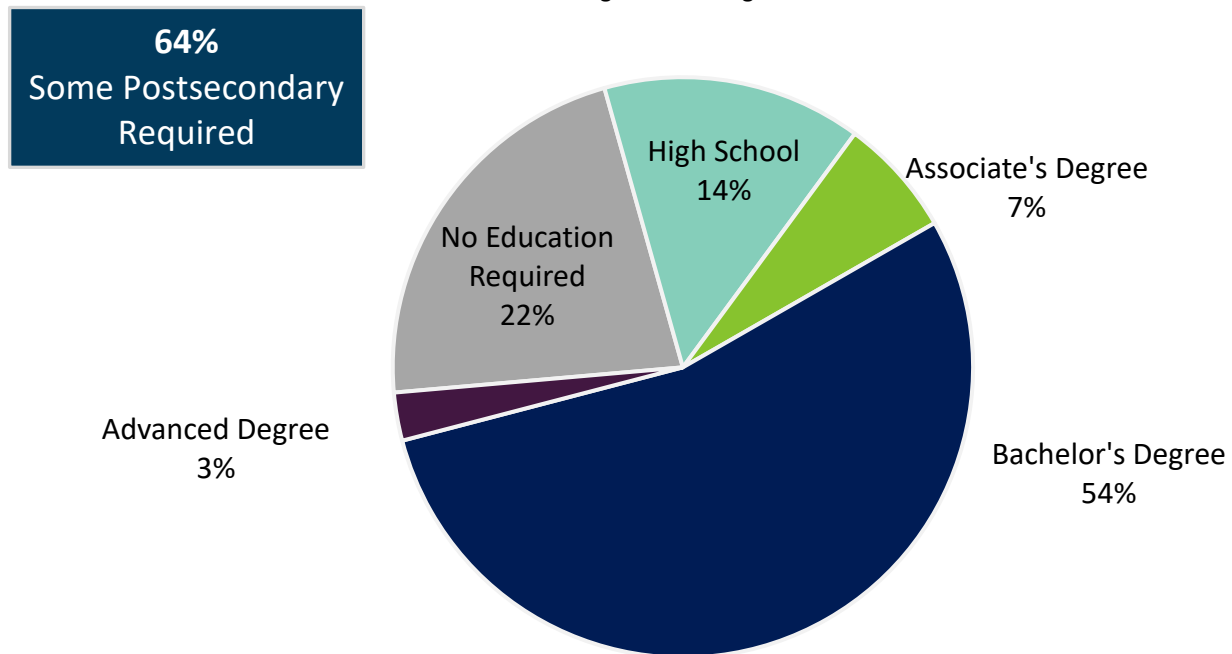


Source: EL calculations based on Lightcast 2026.3 and Federal Reserve Bank of St. Louis (2026)

A review of job postings shows that companies still prefer tech workers with some level of postsecondary training. In the last year, about 64 percent of postings for tech jobs required some form of postsecondary education. This indicates that companies continue to value traditional education pipelines when hiring tech workers.

Minimum Education Required for Oklahoma Tech Job Postings

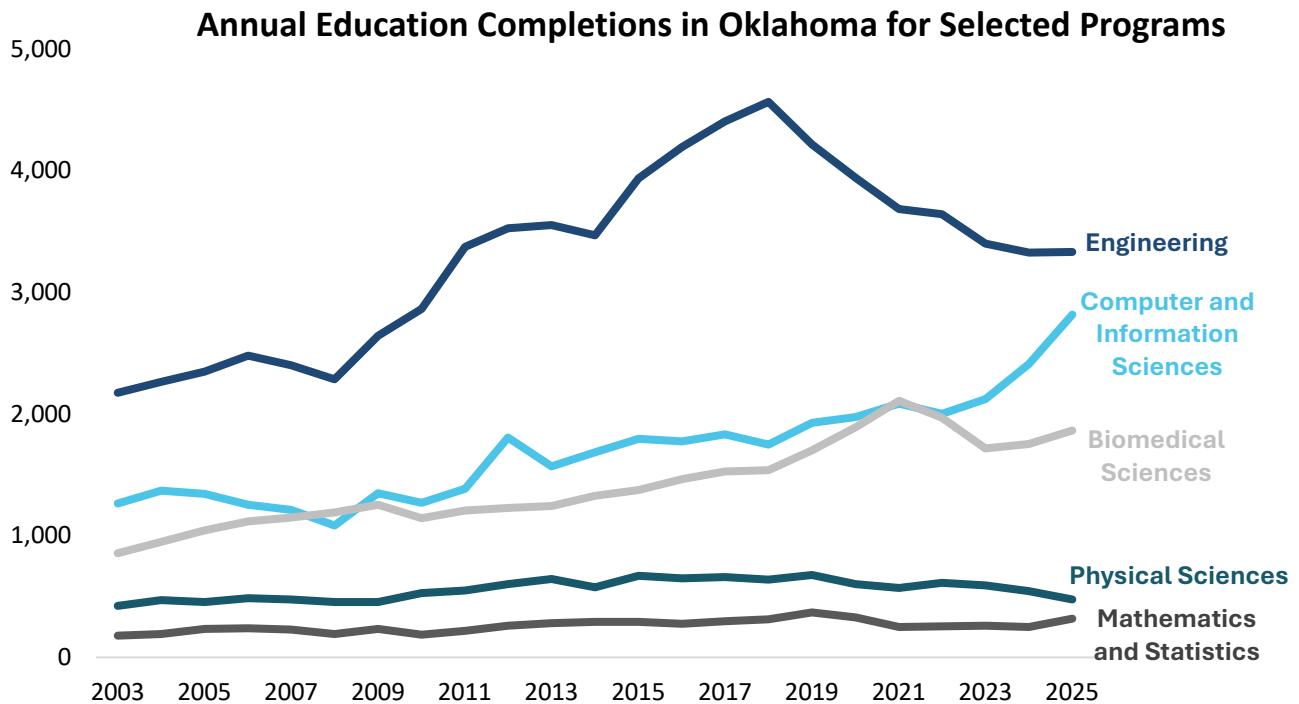
August 2024 - August 2026



Source: EL calculations based on Lightcast 2026.3

A review of data on educational completions (which include degrees, certificates, and awards from postsecondary institutions) shows a decline in engineering-related fields in recent years. Computer and Information Science programs had been relatively flat but saw a sharp increase over the last three years. This rise is largely the result of more online programs, including a master's-level degree at the University of Oklahoma.

Other STEM programs in the state, such as biomedical sciences, mathematics and statistics, and the physical sciences, show a similar number of completions year over year. In 2025, postsecondary institutions in Oklahoma produced about 7,500 completions across all STEM programs. This talent pipeline is crucial for local employers and for recruiting new tech employers to the state.

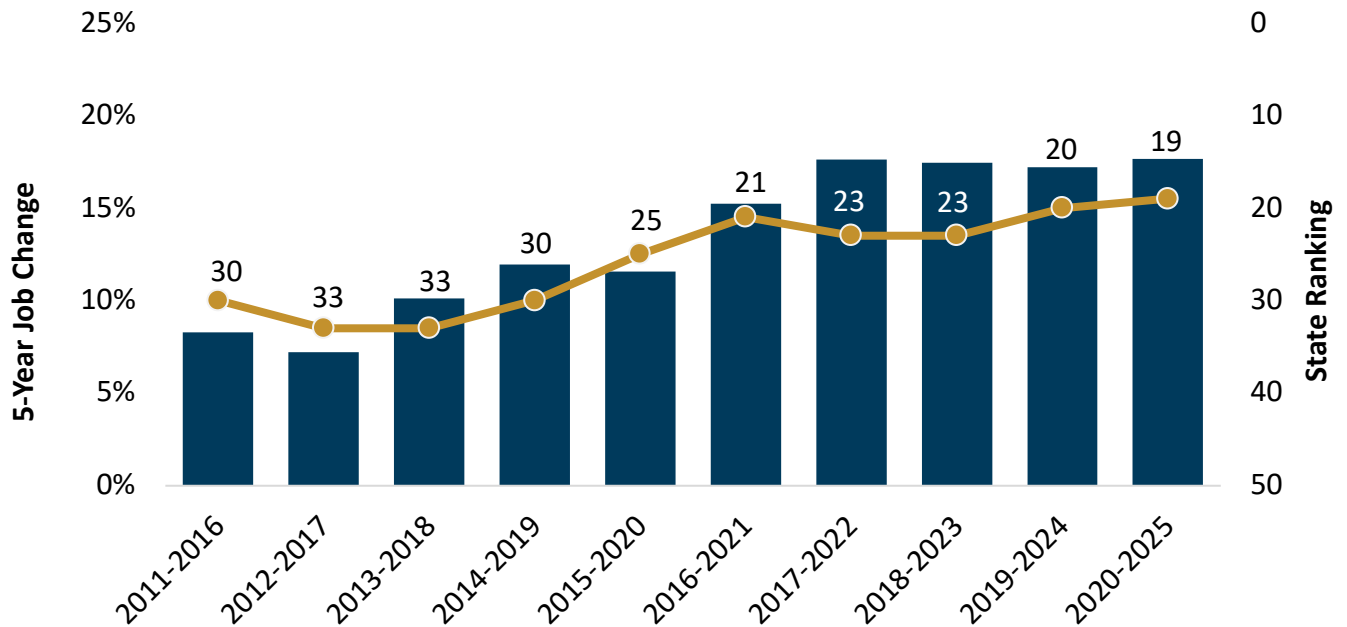


Source: EL calculations based on Lightcast 2026.3

When compared with the rest of the nation, tech occupation growth is an area in which Oklahoma has generally improved over time. The state has risen to the 19th-place ranking in terms of five-year job change rates, an improvement from 33rd place. Oklahoma also offers competitive wages. The state's lower cost of living increases tech workers' purchasing power, and median cost-of-living-adjusted earnings for tech occupations rank among the top 20 states in the nation.

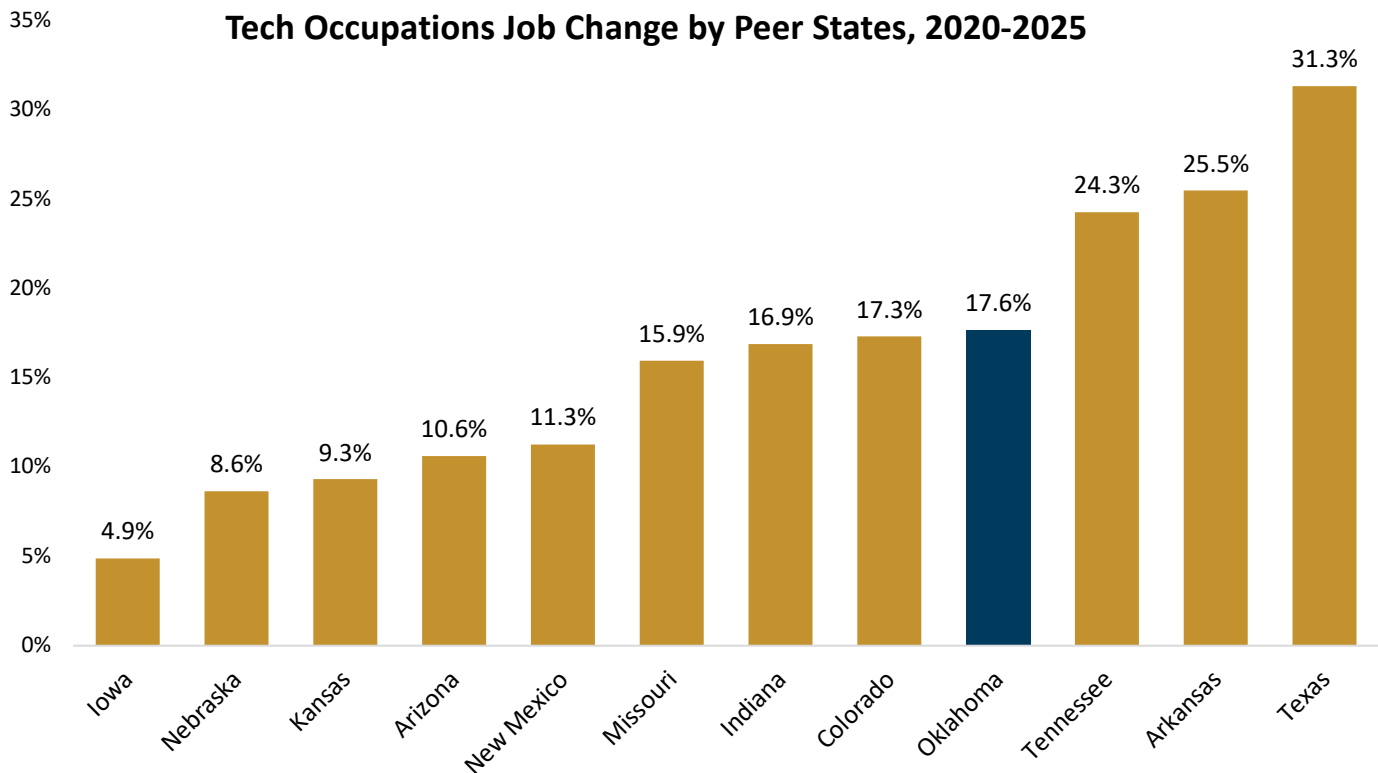
Tech Occupations			
Metric	OK	US	OK Rank
Tech Occupations Employment Concentration (2025)	0.73	1.00	39
Tech Occupations Job Change (2020-2025)	17.6%	18.0%	19
Expected Tech Occupations Job Change (2026-2031)	4.8%	5.8%	32
Median Annual Earnings Adjusted for Purchasing Power (2025)	\$94,200	\$102,300	18

Tech Occupations 5-Year Job Change by Percentage and State Ranking

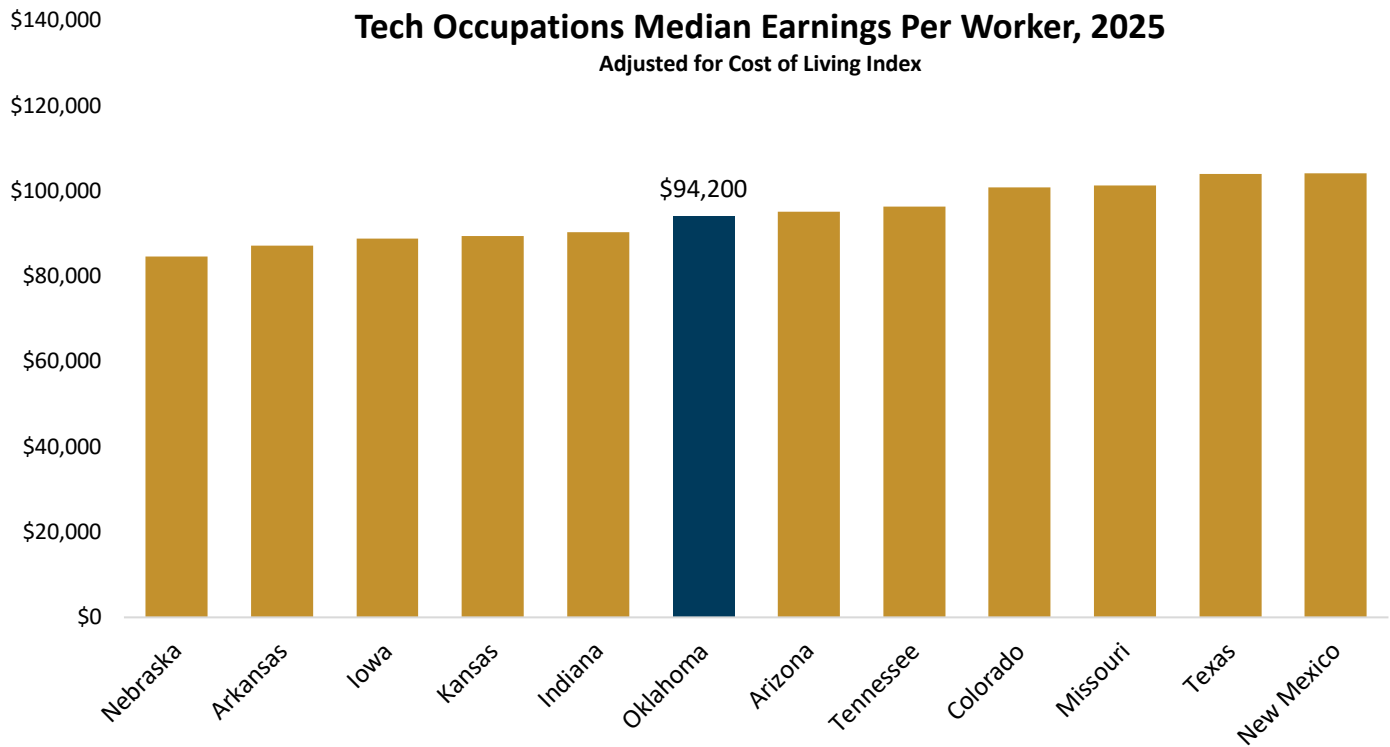


Source: EL calculations based on Lightcast 2026.3

Tech Occupations Job Change by Peer States, 2020-2025



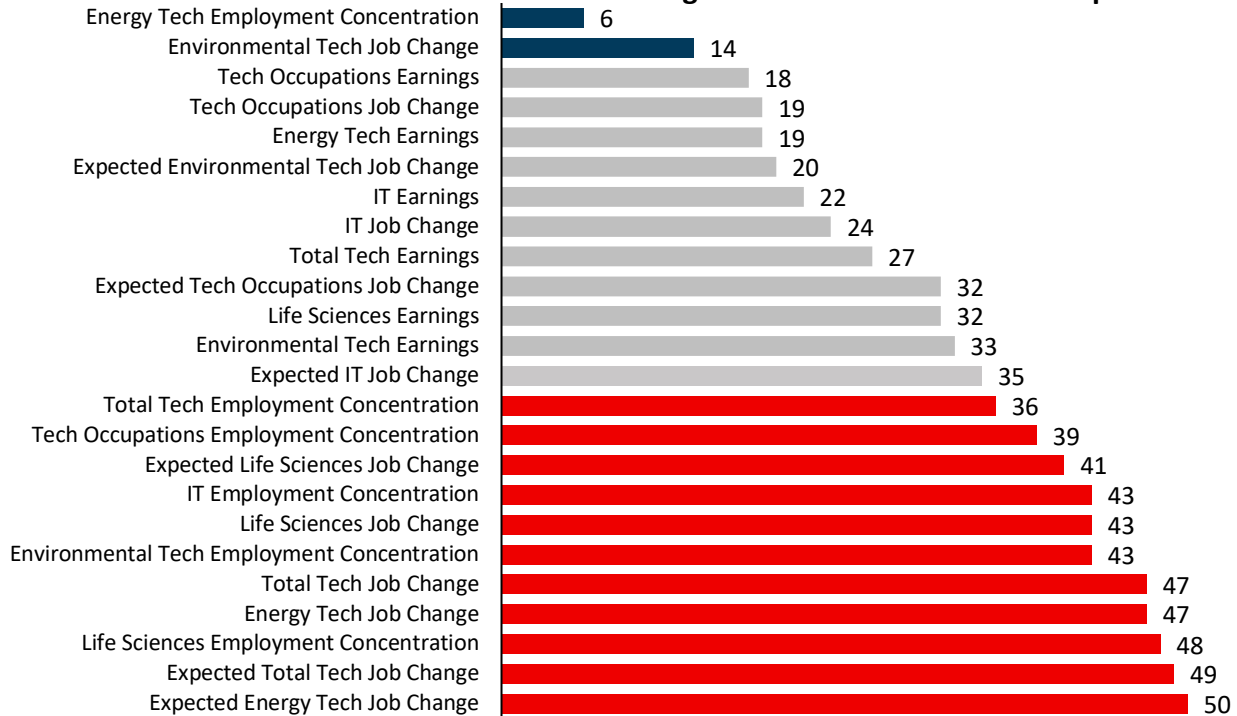
Source: EL calculations based on Lightcast 2026.3



Source: EL calculations based on Lightcast 2026.3

Overall, Oklahoma is less concentrated in tech than many other states. However, job growth rates are strong outside of fossil fuel extraction and generation firms. Cost of living adjusted earnings for several of the tech subcategories and tech occupations are competitive and rank in the middle of the pack.

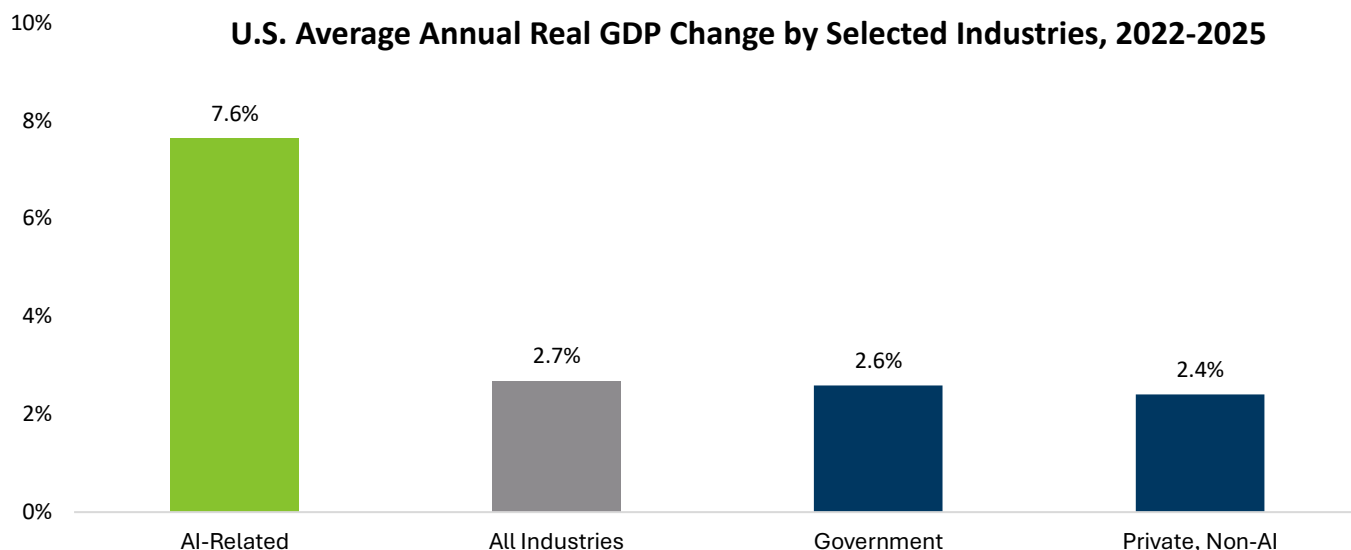
Oklahoma State Rankings for Tech Industries and Occupations



Artificial Intelligence and the Tech Workforce

Artificial intelligence (AI) has the potential to be a highly disruptive force within the existing tech workforce. AI enables machines to perform tasks that require human cognition, such as learning, decision-making, and problem-solving. The most prominent public-facing product, ChatGPT, launched in November 2022 and reached 100 million users within two months. By mid-2025, the platform had approximately 800 million active weekly users. A Pew Research Center survey found that about 34 percent of U.S. adults had used ChatGPT in 2025, roughly double the usage reported in a 2023 survey. ChatGPT and other large language models (LLMs) have become some of the most rapidly adopted technological advancements of our time.

AI extends far beyond ChatGPT, encompassing transformative applications across a wide range of industries. In healthcare, AI systems such as IBM Watson Health analyze vast datasets to support personalized treatment planning and disease prediction. In manufacturing, AI-powered robotics optimize production efficiency and quality control. In finance, AI drives fraud detection systems and algorithmic trading platforms, enhancing both security and operational performance. Evaluating the nation's GDP by AI-dominated fields (including semiconductors, software development, and data centers) reveals that most of the country's economic growth has come from the expansion of AI technologies.



Source: EL calculations based on Lightcast 2026.3 and BLS (2026)

The rapid diffusion of AI has led to its widespread adoption across the workforce. According to data from Anthropic (the company that developed the LLM Claude) computer and mathematics workers in Oklahoma use Claude for approximately 22 percent of their tasks. Unlike previous efficiency technologies, LLMs automate tasks performed by knowledge workers, including writing, editing, coding, and problem-solving.

The debate over whether new AI tools will automate tasks and replace workers, or merely augment tasks to increase efficiency, is ongoing among researchers. Some studies warn that AI could replace substantial portions of the workforce, while others suggest that AI may generate productivity gains with little to no impact on overall employment.

First and foremost, AI is a core technology product that is expanding the potential offerings of traditional tech companies. AI investment is currently carrying the U.S. economy and could be a crucial driver of future growth. This expansion can create new opportunities for these firms and generate additional demand.

The need for highly specialized talent to develop and maintain AI tools is already creating jobs. In August 2026, there were 2,150 unique job postings in Oklahoma that mentioned AI in the job description. AI job postings in the state in recent months have soared to their highest rates since online job posting data began in 2010. The time series of postings suggests that demand has recovered from the downturn in 2022, when Federal Reserve interest rate increases slowed venture capital investment.

Monthly Unique Job Postings for AI in Oklahoma

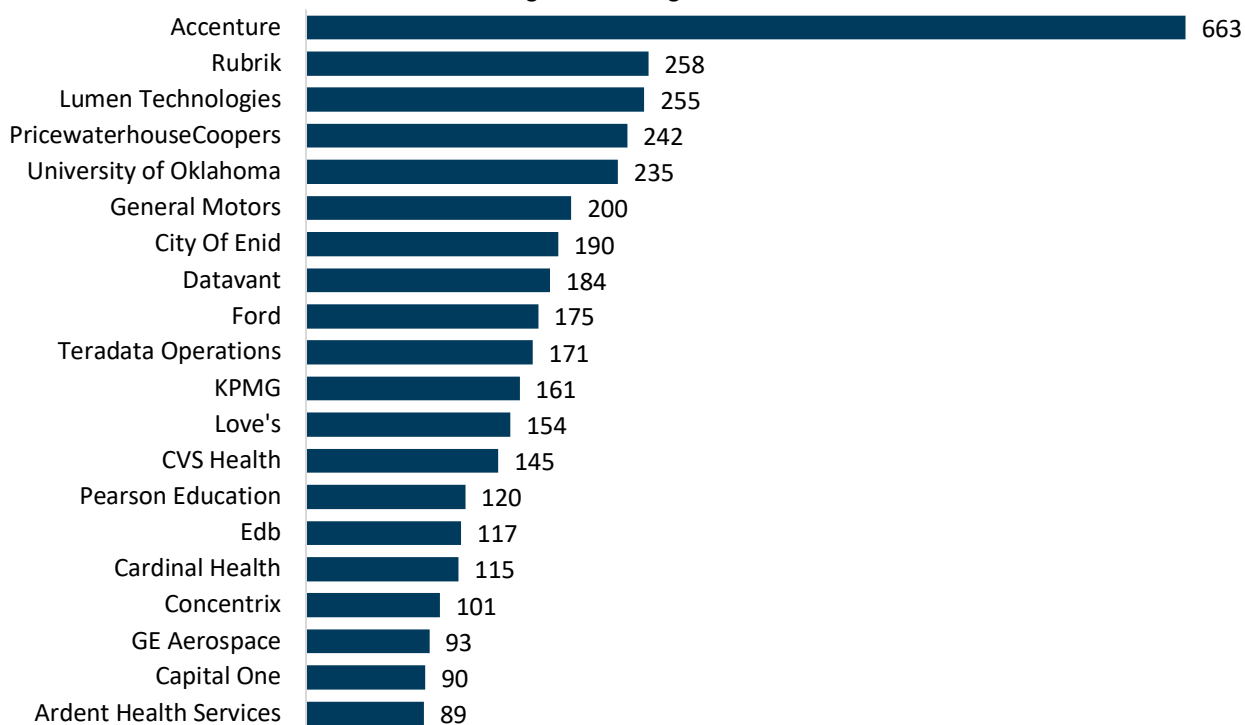


Source: EL calculations based on Lightcast 2026.3

In the last two years, there were 12,830 unique job postings for AI talent in Oklahoma. About 1,560 different employers were competing for AI-skilled workers in the state. Some of the top employers seeking this talent operate in consulting, finance, healthcare, manufacturing, and technology. Universities in Oklahoma are also seeking individuals with AI expertise for research and teaching roles. In August 2026, the average advertised salary for AI-related postings in Oklahoma was \$127,400. These types of jobs can offer economic security for those who have the necessary skills.

Top Companies by Unique Job Postings in Oklahoma for AI

August 2024 - August 2026



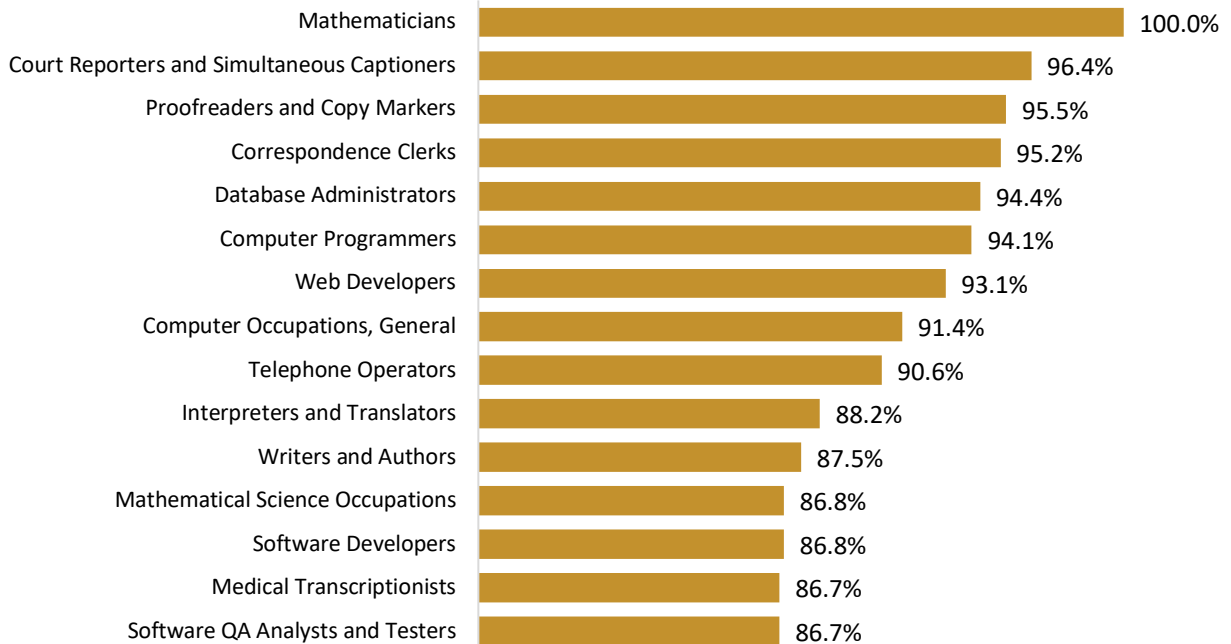
Source: EL calculations based on Lightcast 2026.3

The other side of the AI discussion concerns how this technology could negatively affect job demand and employment. EL reviewed recent research papers that assess which occupations may be most at risk. Most of these studies examined the skill requirements of each occupation and compared them with the types of skills that LLMs and similar forms of AI can augment or automate. Many papers described this dynamic using the term “exposure,” a measure intended to capture the potential impact of the technology rather than predict whether jobs will be replaced by these tools.

One paper emerged as the gold standard and was referenced in most of the subsequent studies. In the seminal “GPTs are GPTs” study, Eloundou et al. (2024) estimated the percentage of tasks performed by each occupation that are exposed to LLM software. Exposure was defined as a 50 percent reduction in the time required to complete a task (the GPT Beta Score).

The exposure scores highlight the types of jobs with the highest potential for task augmentation or automation from AI. Tech occupations such as computer programmers, web developers, mathematicians, and software developers are among the most exposed. Other positions involving clerical or writing work also have high exposure levels. This means that non-tech workers within tech companies, not just tech-specific roles, could also be affected.

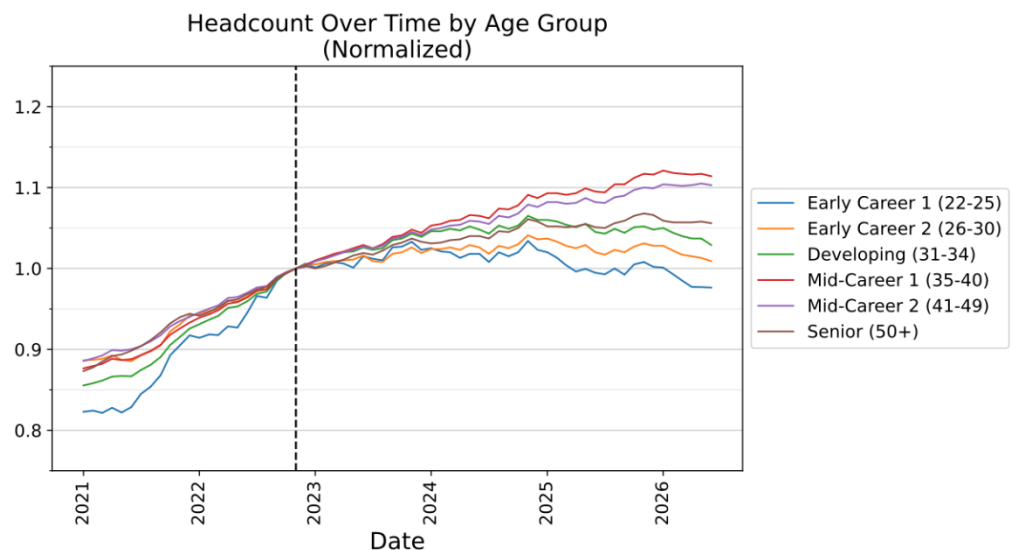
Occupations with the Highest AI Exposure Scores



Source: Eloundou et al. (2024)

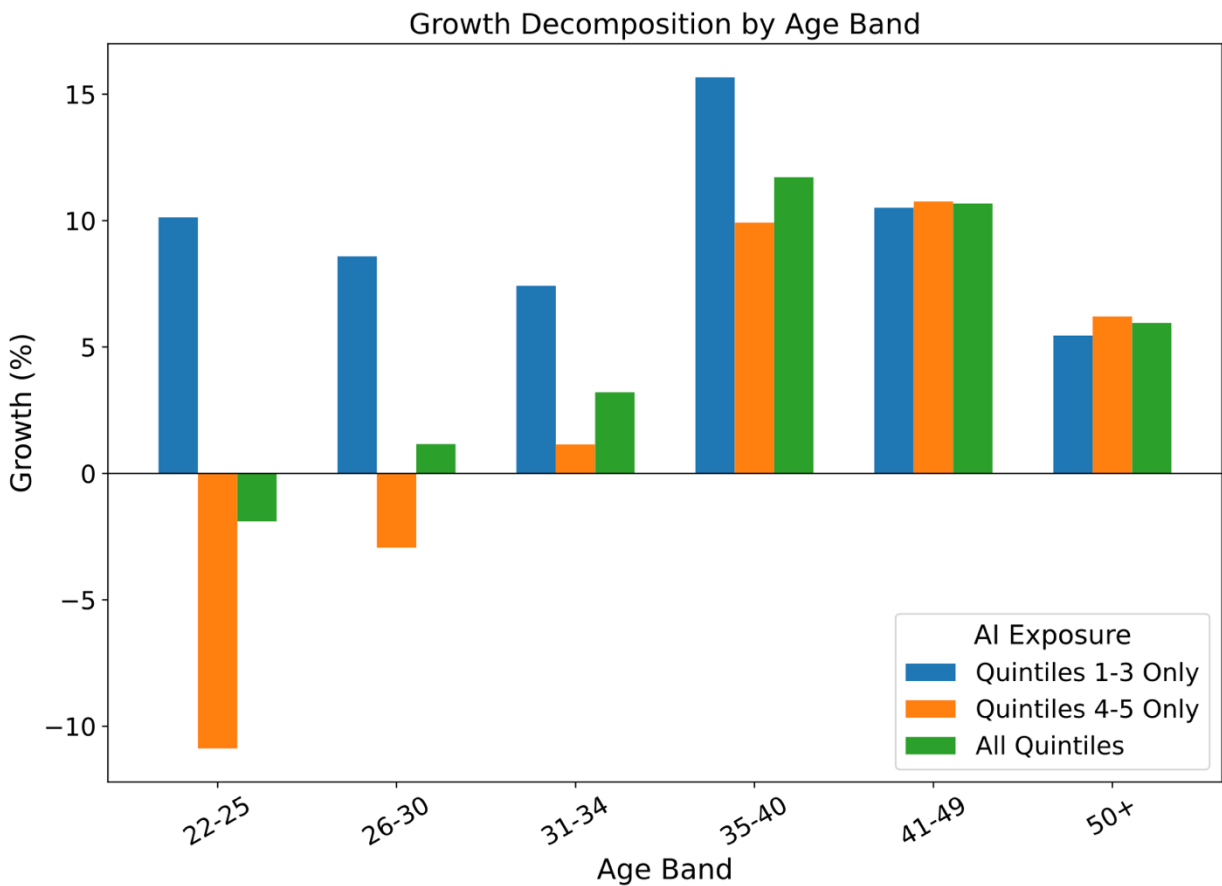
While the long-term impacts of AI on highly exposed jobs remain uncertain, recent data suggest that early-career workers may already be experiencing reduced opportunities. In the paper *“Canaries in the Coal Mine: Six Facts about the Recent Employment Effects of Artificial Intelligence,”* Stanford researchers found evidence that employment levels for younger workers have declined since the introduction of LLMs. This report also uses the GPT Beta exposure score from the Eloundou et al. study. Exposure scores were compared with recent national payroll data from ADP. The research found that in the most highly exposed occupations, early-career headcounts have shifted downward since the emergence of ChatGPT and other LLM tools. These findings remained consistent even after researchers

accounted for alternative explanations such as remote work trends, interest rate hikes, and the impacts of the COVID-19 pandemic on higher education.



The reduction in early-career employment has been most pronounced in occupations with the highest AI exposure

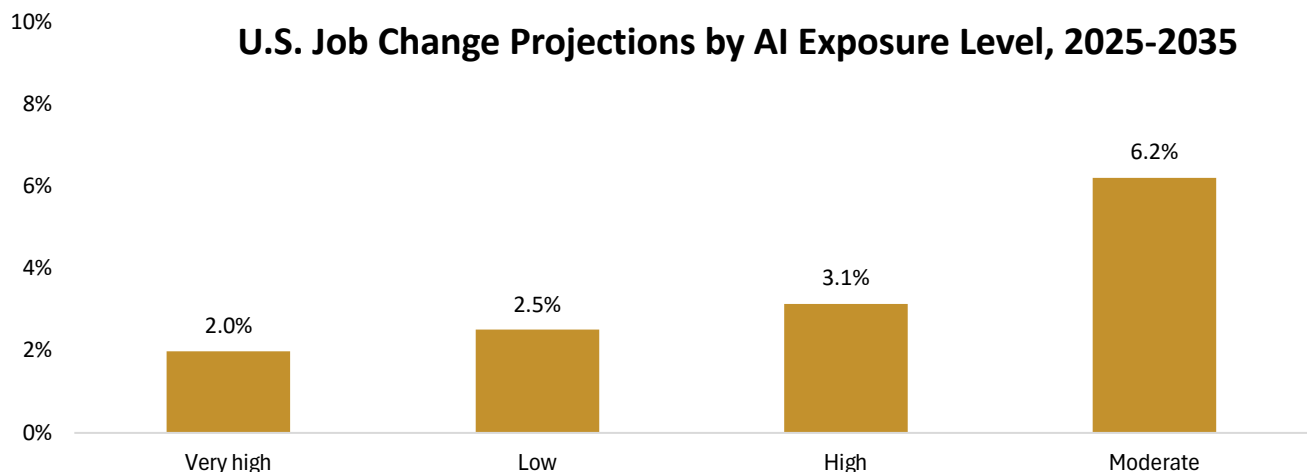
scores (quintiles 4–5). Meanwhile, employment levels continue to rise for older workers in these highly exposed occupations. The challenges recent graduates face in securing knowledge-based employment have also been highlighted anecdotally in several media reports.



Source: Brynjolfsson et al. (2026)

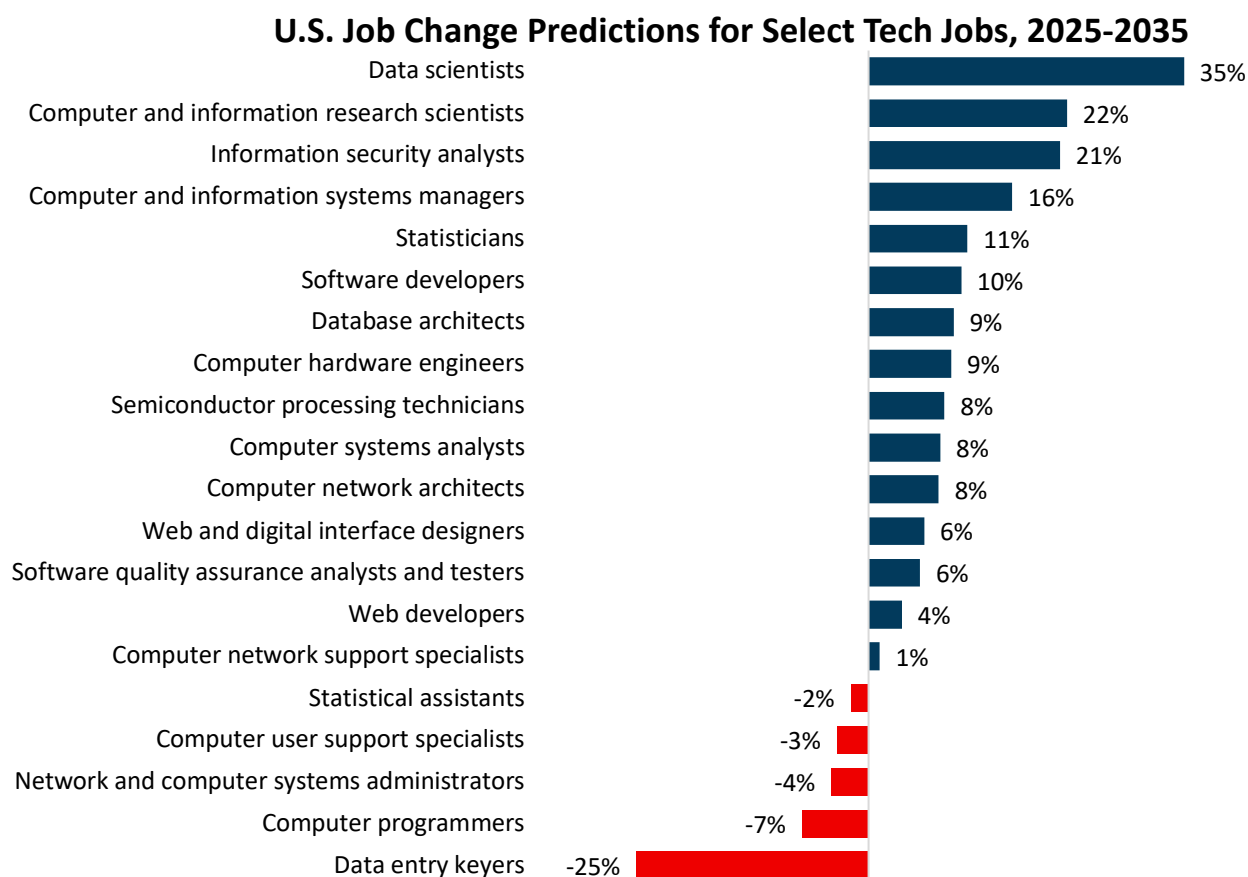
For years, tech jobs have offered stable, higher-paying career opportunities, and many young people have taken on college debt to train for positions in tech fields. If AI exposure in these occupations leads to fewer job opportunities, young workers may face significant challenges in repositioning their careers and achieving economic security. Oklahoma will need to be prepared to train the next generation of AI experts to support its local companies, while also identifying ways to retrain workers whose jobs may be displaced.

The U.S. Bureau of Labor Statistics (BLS) recently released its employment projections for the next ten years. Researchers utilized five of the most prominent AI exposure studies to help account for potential job changes in the next decade. The BLS also created a four-category classification of AI exposure (low, moderate, high, and very high) for each occupation code based on the literature. With these new calculations, job projections can be viewed by different AI exposure category. The BLS is projecting that there will be positive net growth in all AI exposure categories from 2025 to 2035. The lowest rate of growth is projected for the “very high” category. The moderate exposure category is predicted to experience the most growth and includes many trade-based occupations such as solar and wind installers, electricians, healthcare technicians, and HVAC mechanics.



Source: EL calculations based on BLS (2026)

Looking specifically at the tech job market, the BLS is projecting net job growth among the majority of these occupations. Cybersecurity, data science, and research work are predicted to have the highest growth in the next decade. One of the tech careers that could be the most affected is computer user support specialists. This was Oklahoma’s largest tech occupation group in 2025.



Source: BLS (2026)

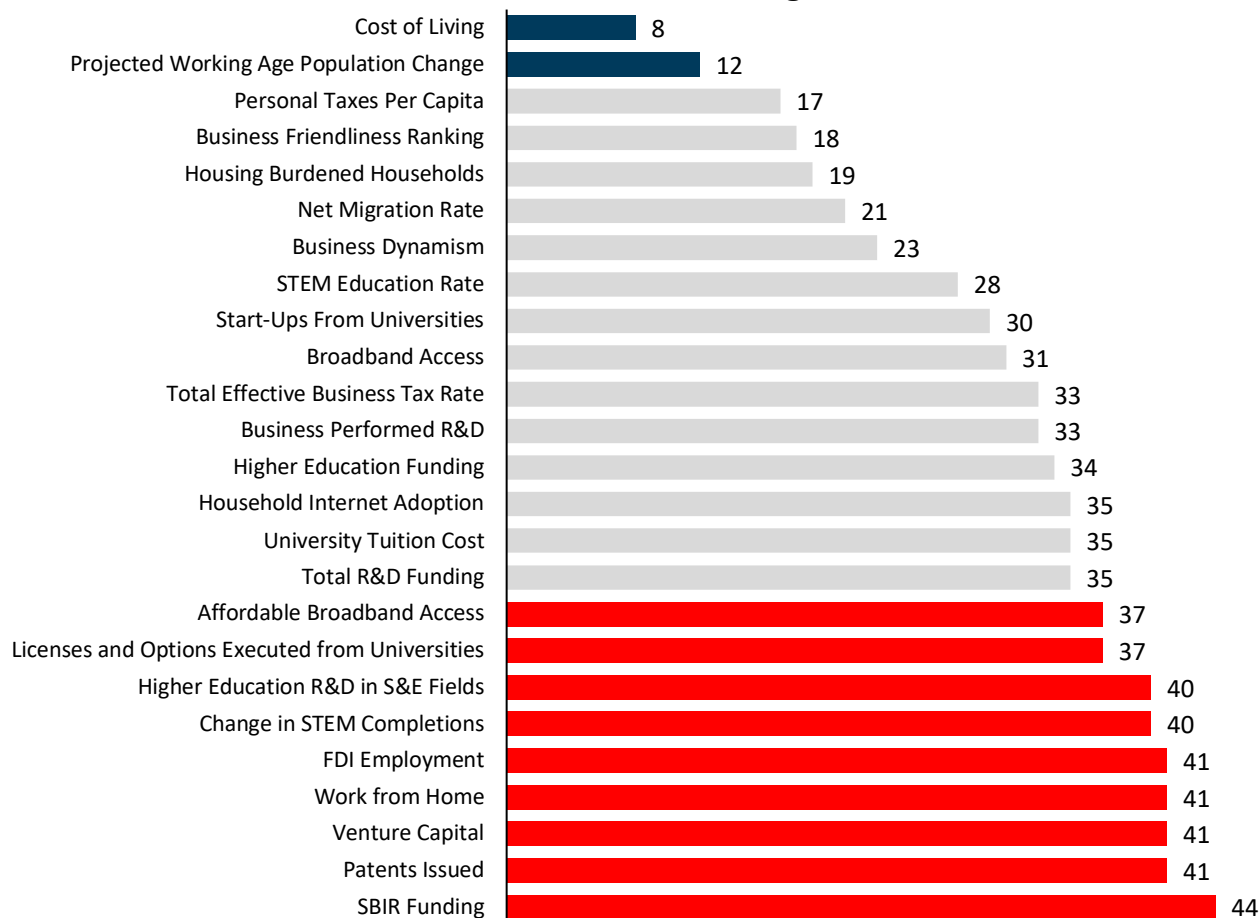
SECTION 3 - COMPARISON OF TECHNOLOGY INFRASTRUCTURE

Similar to other parts of the economy, the technology sector needs a solid infrastructure to flourish. Logistics firms must have good highways, agriculture firms need good ports for export, and many manufacturers need robust water systems. A strong technology infrastructure can be essential to a “knowledge-based economy” and includes these four pillars:

- Entrepreneurship incentives,
- Skilled and educated labor force,
- Physical infrastructure access for technology and communications, and
- Innovation ecosystem fostering collaboration between academia, private sector, and government.

Using this framework, the technology infrastructure of Oklahoma was evaluated by comparing factors that reflect a state’s technology infrastructure such as funding access, patents, STEM education, business climate, and university technology transfer. Oklahoma ranked in the top 15 states for cost of living and projected working age (people age 25 to 64) population change. Being competitive in these factors helps Oklahoma recruit and retain talent while maintaining the workforce pipeline for new tech companies in the state.

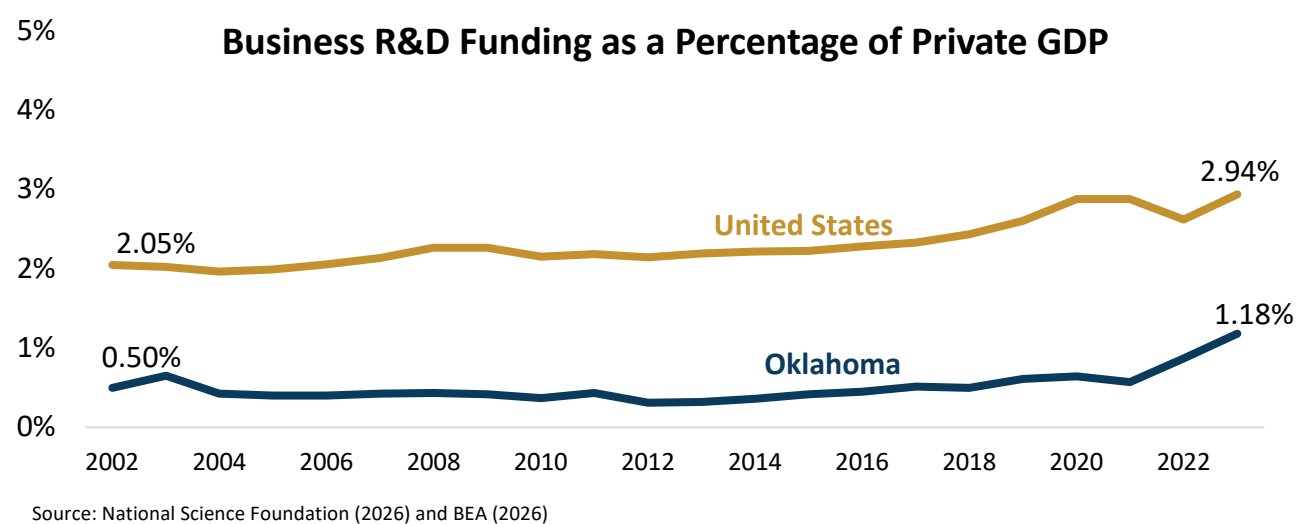
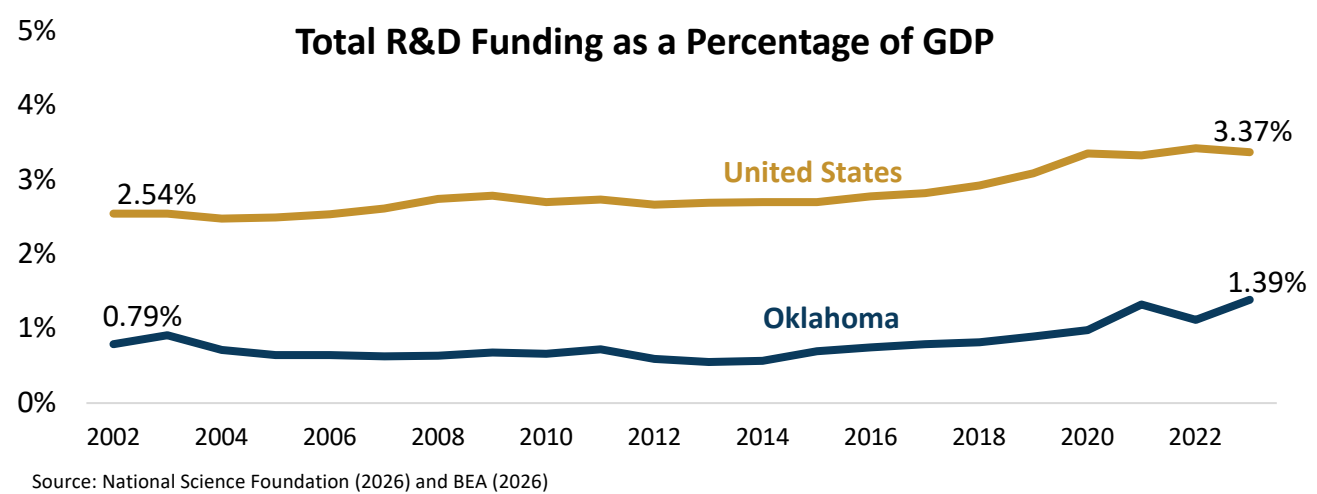
Oklahoma State Rankings for Tech Infrastructure Indicators



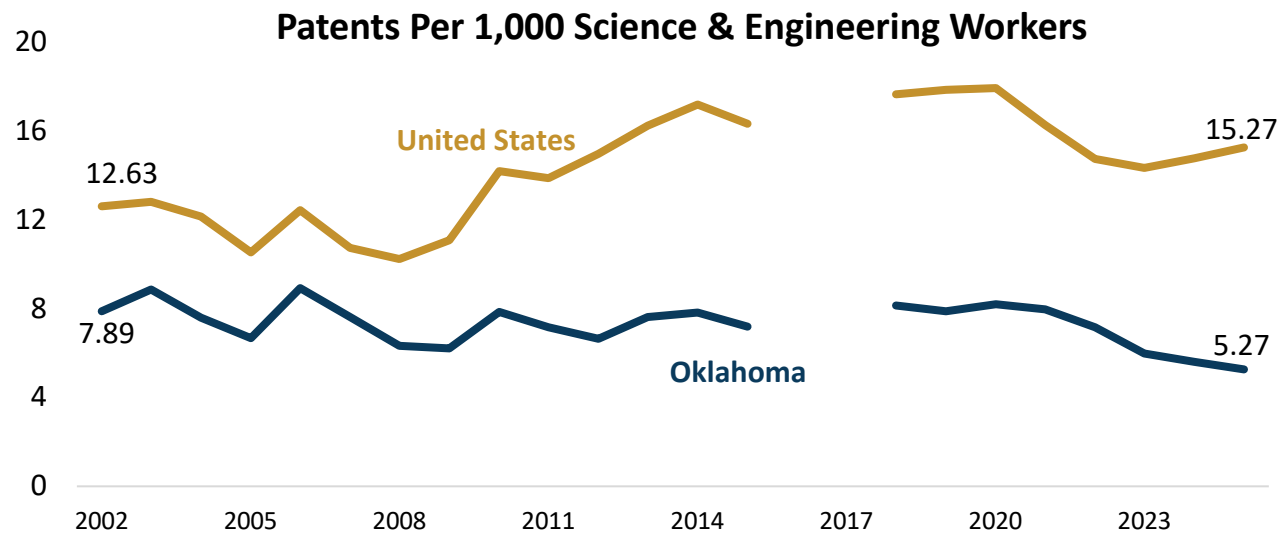
Research & Development (R&D) funding is a major component of a technology sector’s infrastructure. R&D funding helps companies and universities develop new technologies that can be commercialized and spur tech growth. The National Science Foundation calculated that total R&D obligations (including federal, state, and private funding sources) totaled about \$3.6 billion in Oklahoma during 2022. When this level of funding is standardized by the size of each state’s economy, Oklahoma ranks 35th.

Funding Source	Oklahoma Ranking
Federal	27 th
Business	33 rd
Academic	38 th
Nonprofit	14 th
State	40 th
TOTAL R&D	35 th

When broken down by source of R&D funding, the state competes well in federal and nonprofit research funding. Business, state, and academic research funding levels remain low compared to other states. Business R&D funding made up 1.18 percent of Oklahoma’s private GSP in 2022. This is a rise from previous years and indicates that business research investment is being prioritized and lifting the overall R&D levels.

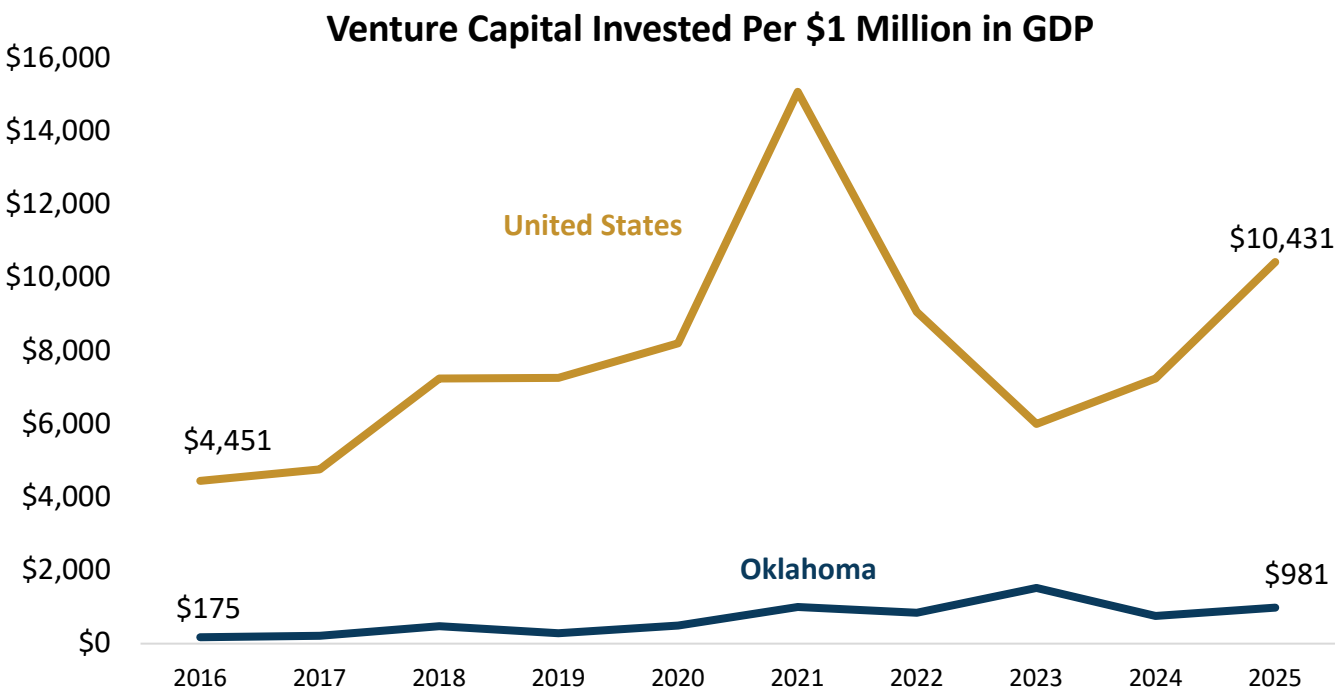


Patents are another indicator of the level of innovation occurring in a region. Patents often spur growth, particularly in high-cost industries such as pharmaceuticals. For this metric, patents are standardized by the number of science and engineering workers. Oklahoma averaged about 5.27 patents per 1,000 science and engineering workers in 2024. Oklahoma ranked 41st for this metric, with one of the lowest patent rates in the country. The rate is also trending down over time.



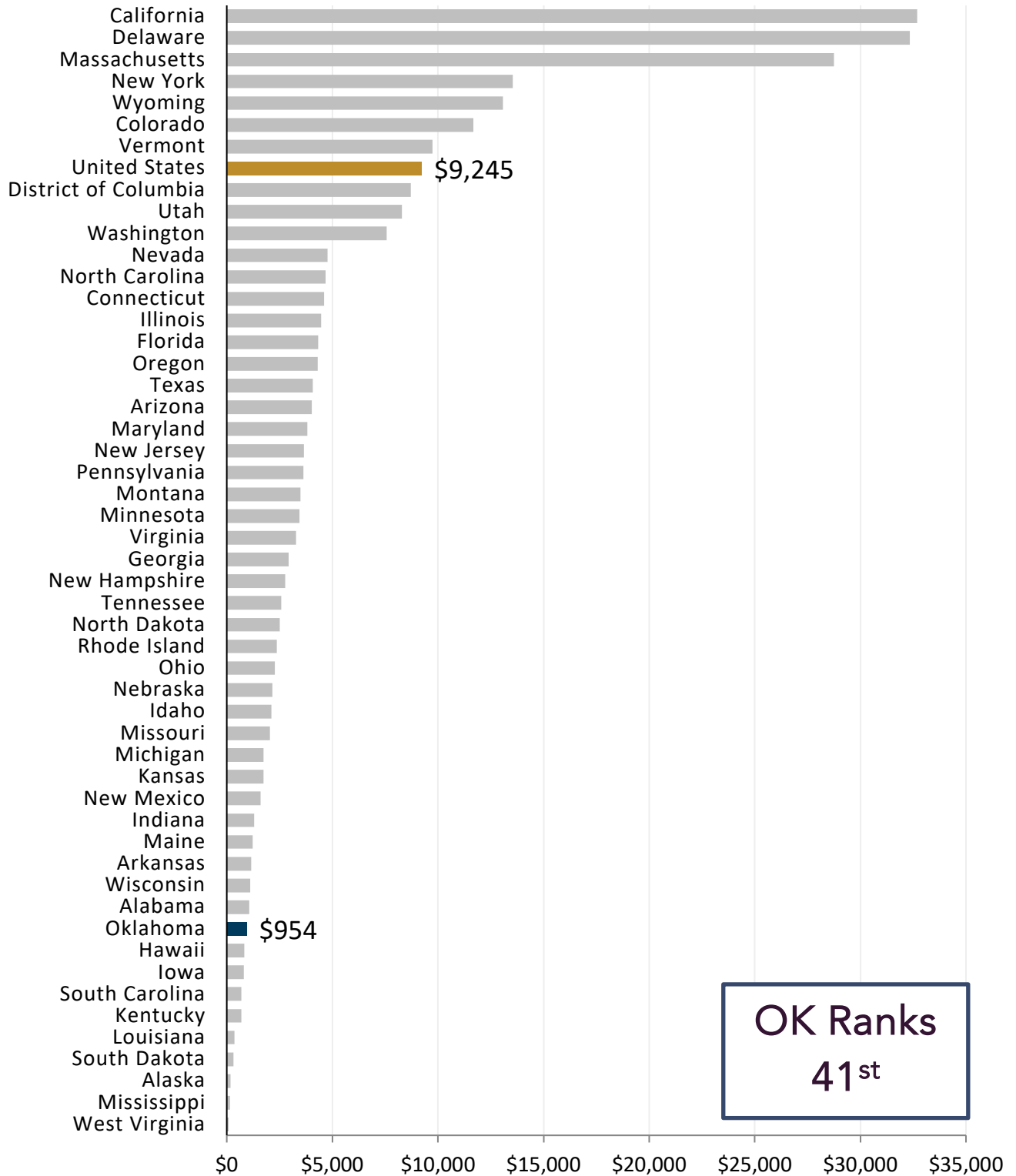
Source: USPTO (2026) and Lightcahst 2026.2

Venture capital is often an essential tool for start-up companies to grow into tech leaders and bring products to market quickly. Looking at growth rates for venture capital, Oklahoma’s level of venture capital funding was almost six times higher in 2025 than in 2016. While state growth remains consistent, other markets in the nation garner the vast majority of venture capital investment.



Source: National Venture Capital Association (2026) and BEA (2026)

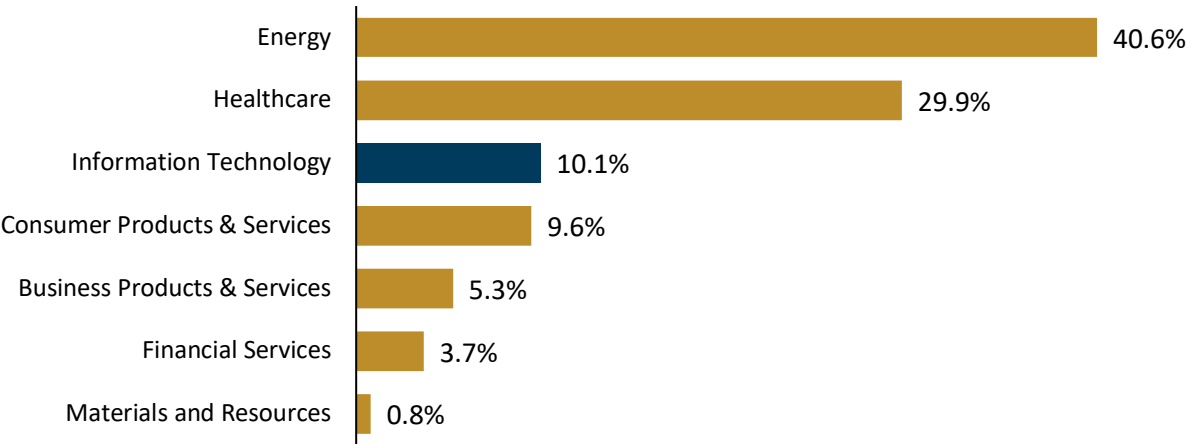
Venture Capital Invested Per \$1 Million of GSP, 2020-2025



Source: EL calculations based on NVCA (2026) and BEA (2026)

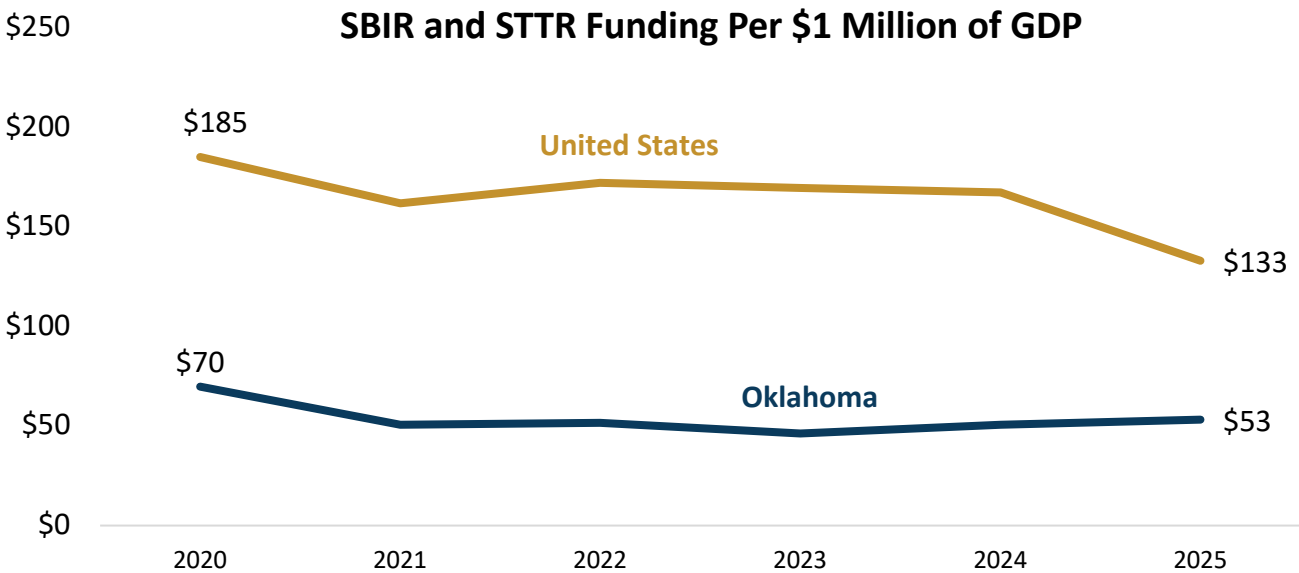
The venture capital funding in Oklahoma is mainly focused on the energy and healthcare industries. Information technology funding only accounted for ten percent of 2025 funding.

Oklahoma Venture Capital Investment by Sector, 2025



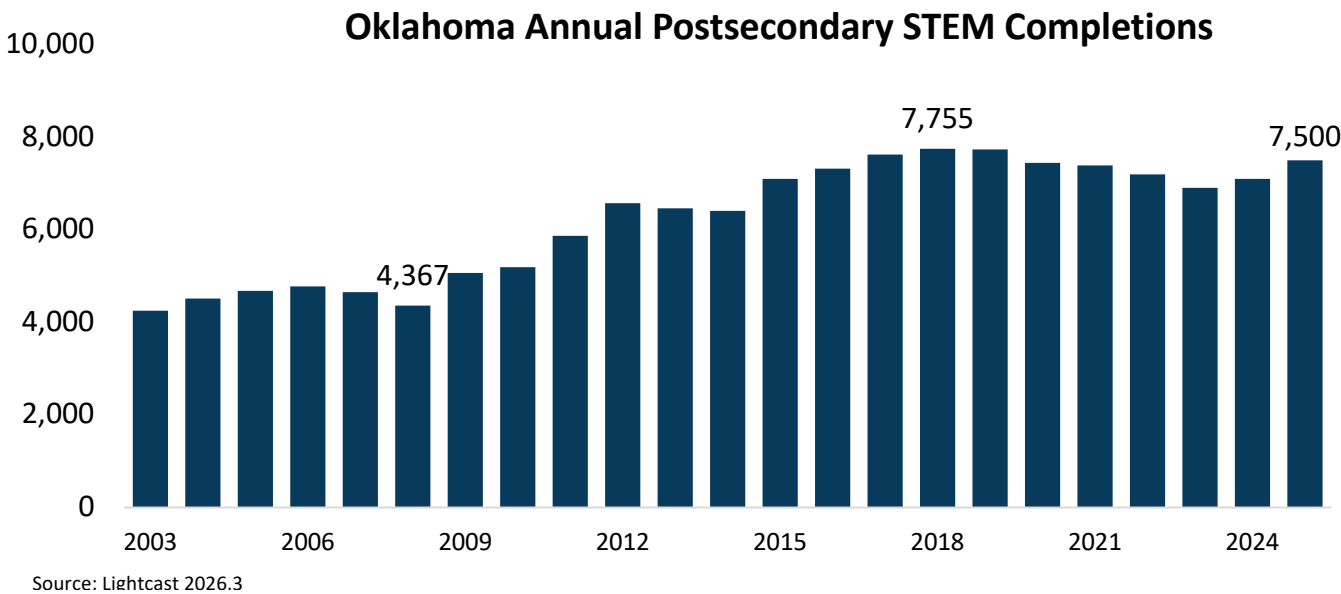
Source: NVCA (2026)

One option for new companies seeking funding for high-tech R&D is the federal Small Business Innovation Research (SBIR) and Small Business Technology Transfer (STTR) programs. These initiatives support and encourage American innovation by investing in small businesses during their concept and prototype development phases, with the goal of reaching commercialization. SBIR/STTR awards can provide critical early-stage funding for high-reward concepts. Recent SBIR funding indicates that Oklahoma’s startups are not utilizing these funds as much as other states. Oklahoma ranked 44th in SBIR and STTR funding per GSP; this was the lowest metric ranking for the state in the infrastructure analysis. States can help local startups apply for and secure these funds with matching grants and other incentives.

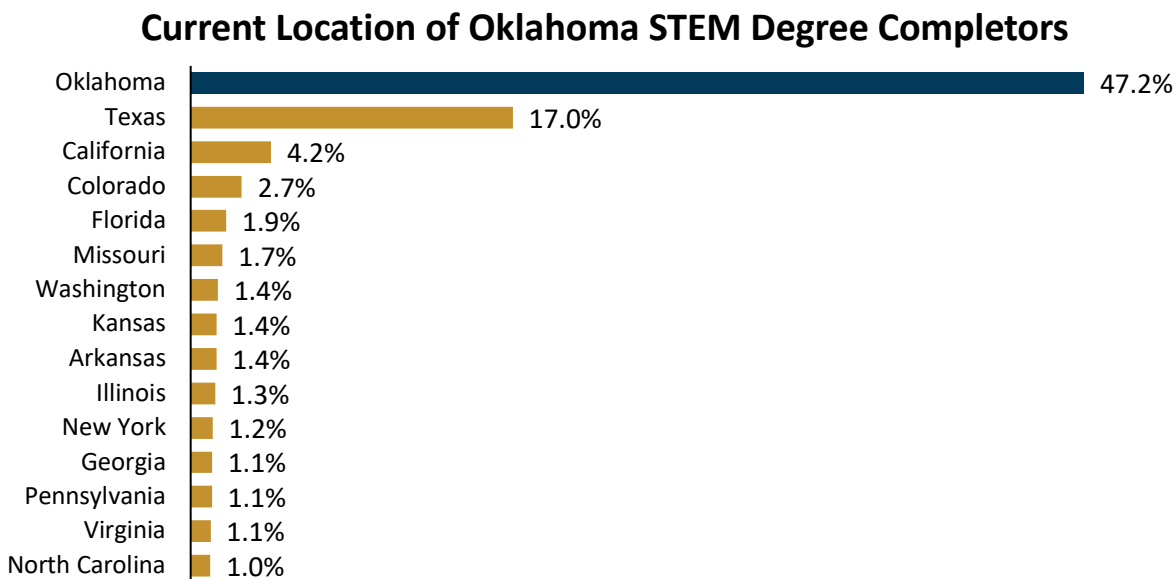


Source: SBIR (2026) and BEA (2026)

One of the essential components of infrastructure for a knowledge-based economy is a skilled labor force. Tech occupations often require STEM degrees for entry-level positions. In 2025, Oklahoma students completed 7,500 STEM-focused education programs. Oklahoma scored poorly, ranked 40th, for the change in STEM degrees from 2020 to 2025. This was largely due to a decline in engineering program completions. Computer science degrees in the state rose in the last year.



Data from online profiles from sites like LinkedIn can be scraped based on the degree and school listed in each person’s profile. In an evaluation of online profiles of people who completed a STEM degree at a postsecondary institution in Oklahoma, many former students tended to remain in the state after graduation. The analysis only evaluated online profiles that had been updated since 2020. There is some significant leakage of students to Texas. About 17 percent of profiles reviewed stated their current location as Texas.

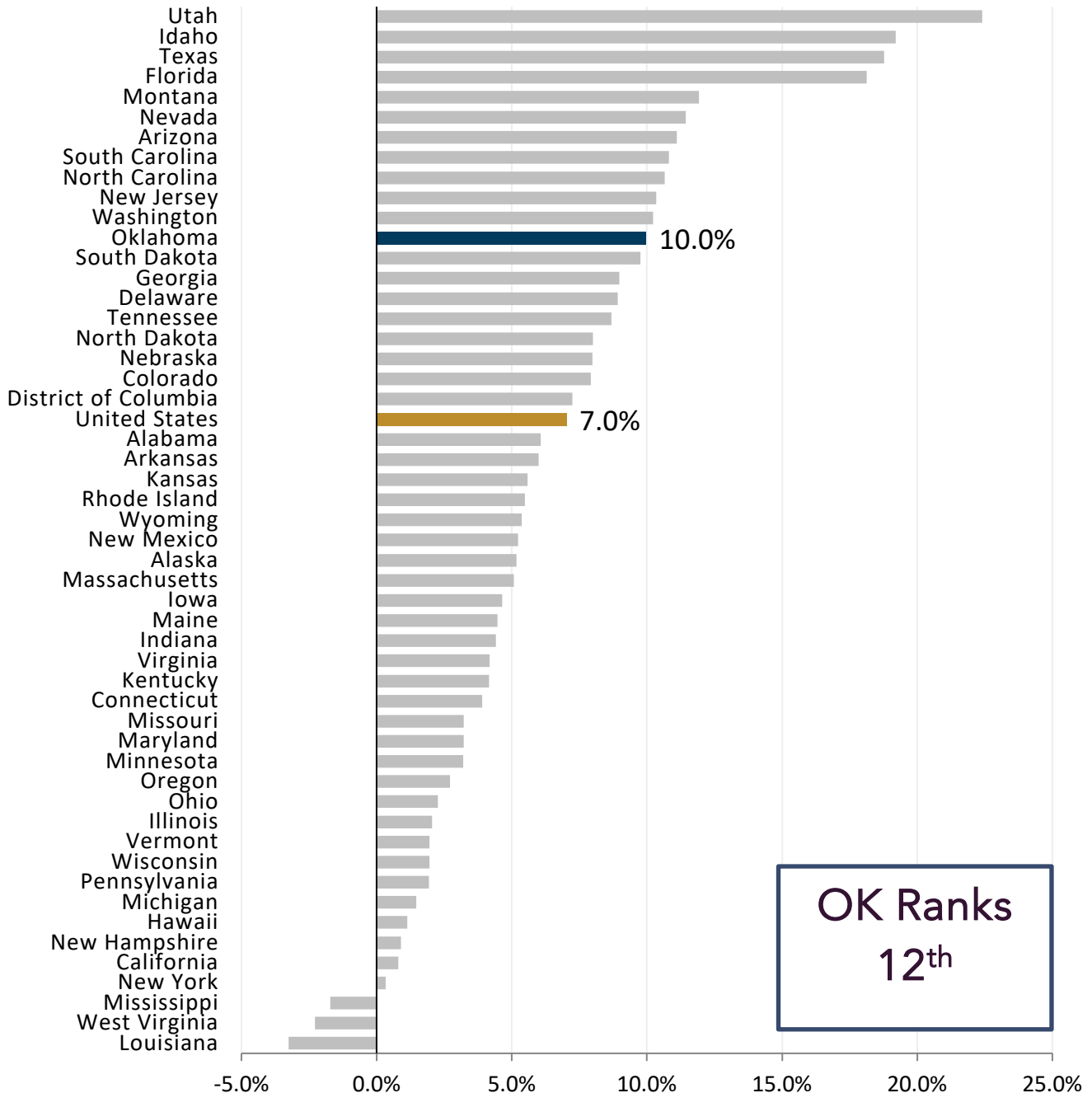


Source: Lightcast 2026.3

As workforce remains a key challenge in the tech sector, specific data influencing the size of the state's talent pool were evaluated. Migration into the state can help expand the workforce. The net in-migration rate for Oklahoma was 0.69 percent in 2024. This figure includes domestic and international migration. This was just below the national average of 0.82 percent. Recent migration patterns have generally followed state tax trends, though with some exceptions. States with the lowest income taxes tended to attract the highest rates of new residents, but low personal taxes alone did not guarantee strong in-migration. Oklahoma has lower personal taxes per person than the national average, ranking as the 21st lowest in personal taxation. Lower tax rates can help draw workers from higher tax states and create a larger and deeper talent pool for the state's tech industry.

Migration is only one component of overall workforce size. Oklahoma's working age population is projected to grow by 10.0 percent over the next ten years, the 12th highest rate in the nation. Several key tech states (New York, Washington, California, and Massachusetts) have seen large amounts of out-migration in addition to lower birth rates. A few states in the country are expected to see declines in their working age population during this time. As companies tend to locate where they can find workers, these trends help Oklahoma remain competitive in today's talent wars.

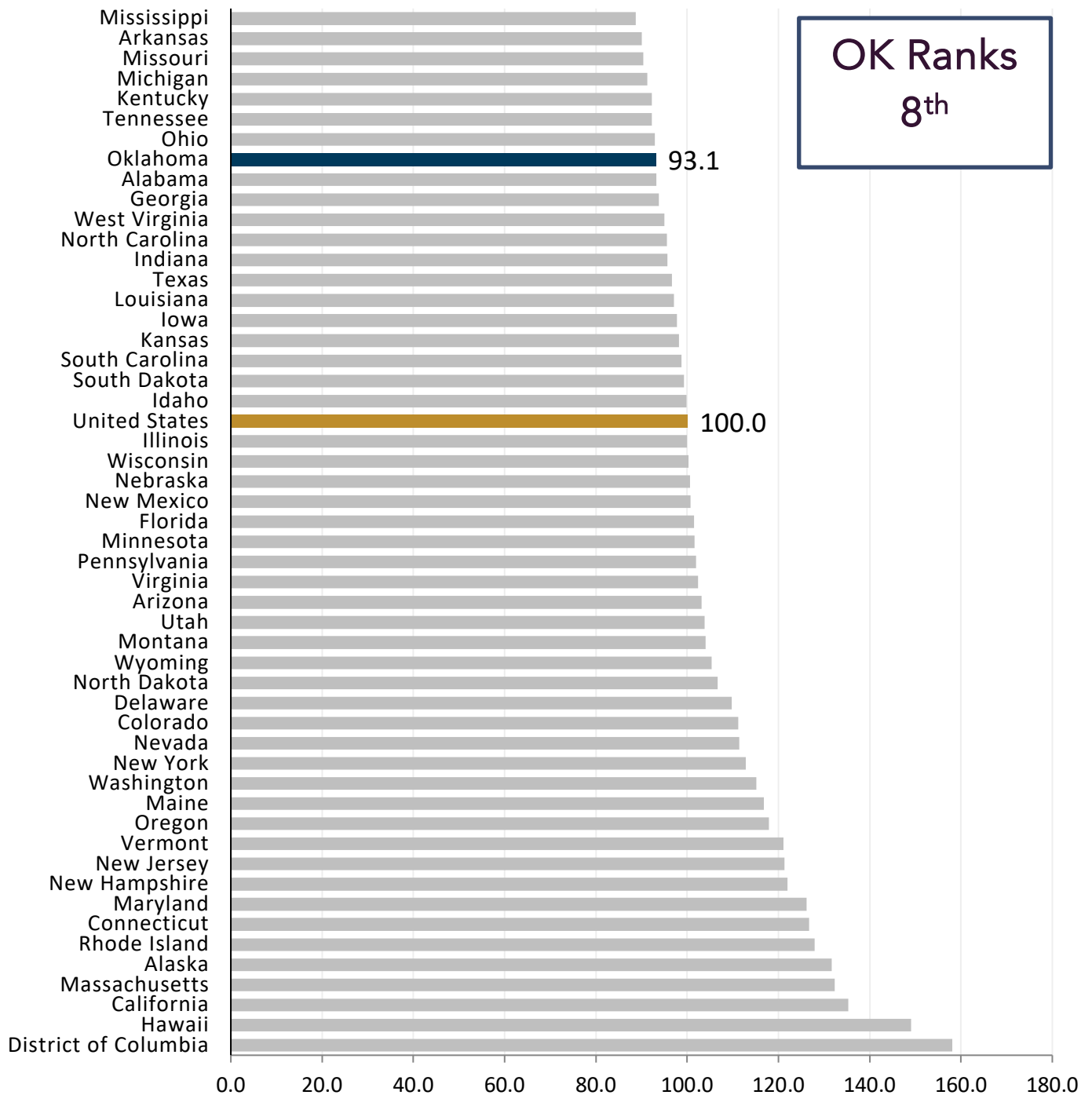
Projected Working Age Population Change, 2026-2036



Source: EL calculations based on Lightcast 2026.3

Many of the top growing states have also experienced increases in their cost of living. Colorado is an example of a state that experienced strong in-migration but then became less competitive as the cost of living rose, particularly for housing. Affordability is increasingly becoming an important factor in talent and business location decisions. Oklahoma has the 8th-lowest cost of living in the nation and offers workers more value for each dollar they earn.

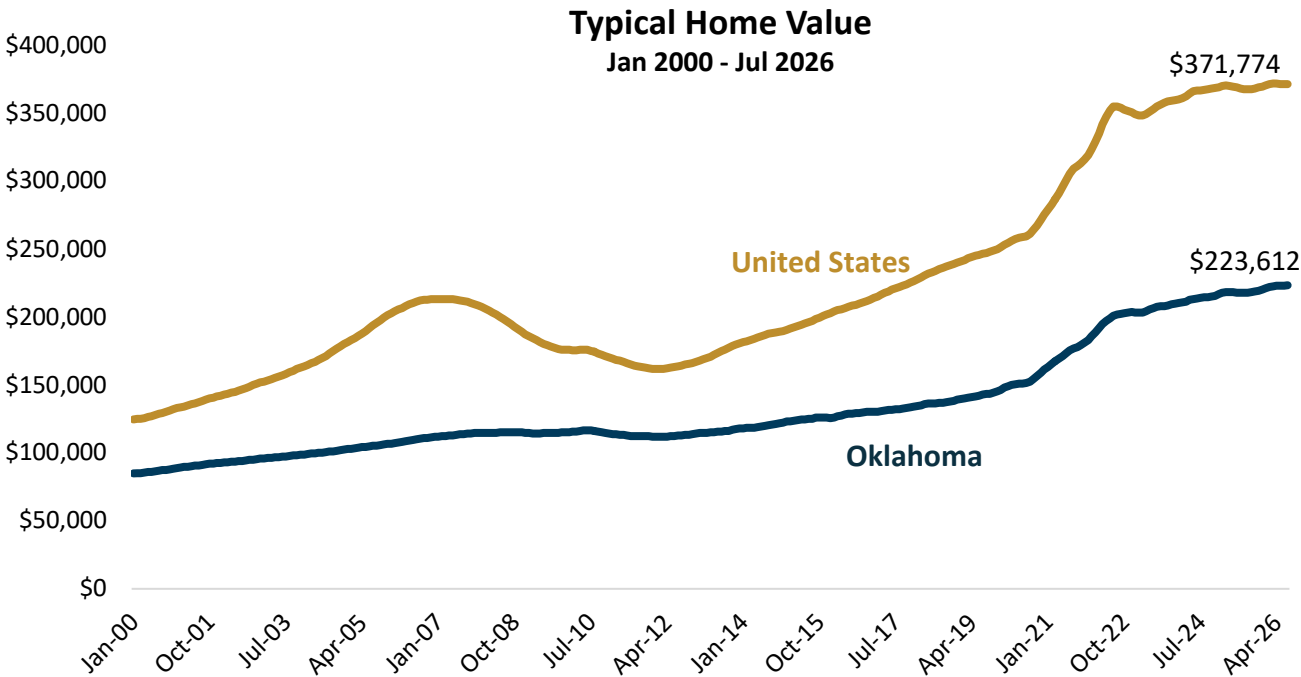
Cost of Living Index, 2025



Source: EL calculations based on Lightcast 2026.3

Oklahoma home prices had been rising at slow but steady rates before the pandemic. After the pandemic, Oklahoma saw a surge in home prices, but it was not as dramatic as those witnessed in other states. After the Federal Reserve began fighting inflation with interest rate hikes, the real estate market stabilized. Oklahoma home prices still average well below the national average.

In 2024, about 28 percent of households in Oklahoma were considered housing-burdened (paying more than 30 percent of household income on housing). The national average rate was 33 percent. Oklahoma had the 19th lowest number of housing-burdened households in the country. This metric highlights that for many in the state, household income is sufficient to afford housing.



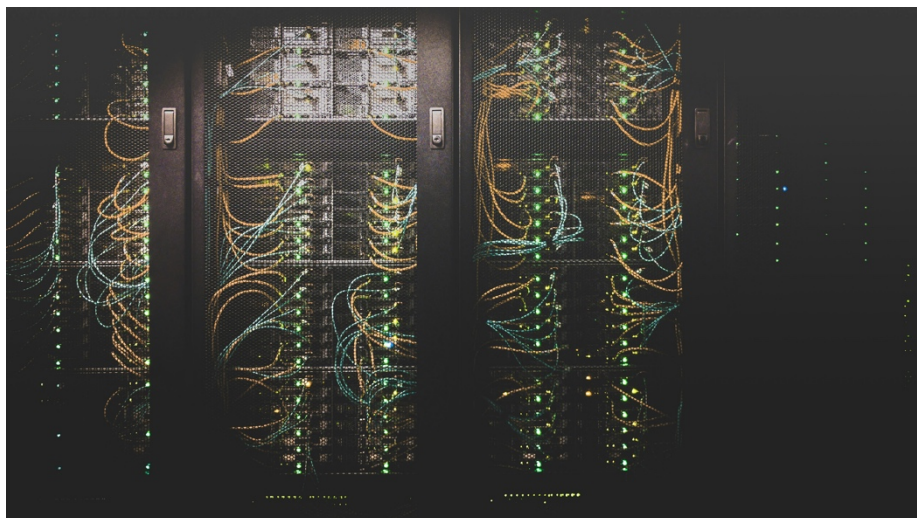
Source: Zillow (2026)

Many of the state’s residents remain without access to affordable high-speed broadband. Internet access is a good indicator of connectivity for a knowledge economy. Access is the first step in making sure everyone can be plugged into the information economy. When high-speed broadband is available, more workers are able to work from home, allowing the tech workforce to expand. People who might not otherwise have been able to participate in the workforce, such as individuals with disabilities, can now access jobs through remote work. The central factor influencing adoption is affordability.

BroadbandNOW Research measures the population without access to high-speed affordable broadband. In 2025, affordable plans were defined as those costing under \$60 per month. In Oklahoma, 24 percent of the population lacked access to this service in 2025, ranking the state 37th in the nation. This lack of affordable options is likely why Oklahoma ranked 35th across the country in the percent of households that had an internet subscription.

Several business climate and workforce metrics were also measured. A supportive business climate is crucial in states where the tech sector is prominent, as strong policies and incentives can attract high-growth firms, skilled talent, and venture capital. By fostering a competitive regulatory and tax environment, Oklahoma can strengthen its appeal as a hub for innovation.

The state scores well in terms of business friendliness (18th-place ranking) in the CNBC annual Top States for Business report. The total effective business tax rate in Oklahoma for the 2024 fiscal year was five percent. This places the state in the middle of the pack, with a 33rd-place ranking. The top states had effective business tax rates between three and four percent. Competitive tax rates, as well as smartly crafted incentives, can help recruit new businesses and retain existing companies in the state.



SECTION 4 – SUMMARY OF STAKEHOLDER INPUT

To gain insight into what tech sector leaders across Oklahoma see as the most pressing issues and potential solutions related to tech competitiveness, Economic Leadership interviewed 18 prominent individuals between May and July 2026. These leaders came from a variety of tech industries, the education and financial sectors, tribal nations, economic development, and innovation support organizations in several regions of the state. A summary of their thoughts and opinions follows.

Oklahoma’s primary **strengths** in terms of its environment for fostering tech innovation and tech talent revolve around the “essentials.” Big picture assets that support tech sectors include:

- Affordability, a low cost of doing business
- Infrastructure such as reliable, low-cost energy, interstate system, rail, water, and broadband access
- Available land
- A strategic US location
- An attractive quality of life, especially for families.

Another significant strength is the presence of the tribal nations. From a human resources standpoint, stakeholders point to the small size of Oklahoma meaning that leaders are easy to identify and only “one phone call away”. The population’s history of resilience, hard work, and grit is another asset. Specific to technology industries and talent, leaders cite the CareerTech system and organizations like the Oklahoma Center for the Advancement of Science and Technology (OCAST).

The most often noted **weakness** that hampers tech development in Oklahoma is the K-12 education system. Different interviewees described education shortcomings as reality, perception, a lack of funding, system fragmentation (too many districts), and suffering from “very low expectations” overall.

“Do we want to be a tech state, or the ‘no-tech’ state?”

Other weaknesses related to tech and innovation include the lack of a positive narrative around tech and economic growth, and increasing concern about “anti-business” state legislators. Several stakeholders also cite the lack of a unified vision around tech in Oklahoma and how to strengthen state competitiveness. A lack of highly skilled tech talent—and an ability to recruit that level of talent—is another concern. Finally, some worry that Oklahoma’s current economic climate is overly risk averse and not sufficiently nimble.

We asked about the state’s **most important tech sectors** and how well they’re supported. Energy (oil and gas) is mentioned most prominently, described as a mature legacy sector with a good support system and some energy tech innovation. Aerospace and defense is another top sector, though some feel this activity in Oklahoma takes place on disconnected “islands.” Biotech and healthcare technology is fairly strong, especially in the Oklahoma City area. Advanced manufacturing is important in many parts of the state. Some stakeholders feel that aerospace and defense, biotech, and advanced manufacturing all need better, more coordinated statewide support to thrive. Texas’ advantages with some tech ecosystems—semiconductors, for example—is noted by Oklahomans.

Another critical topic for tech ecosystem development is Oklahoma's **workforce** and its fit with tech employer needs. Overall, leaders feel there is a decent supply of workers for entry-level and mid-level positions such as technicians. Experienced, top-level talent is difficult to come by in the state and difficult to recruit from outside.

By far, the shining star of education and training assets in Oklahoma is the two-year CareerTech system, viewed as responsive, nimble, a "jewel." In other ways the state's education system struggles to prepare high quality tech talent. STEM exposure is limited for K-12 students compared with competitor states, and high schools are "hit or miss" depending on the district. Higher education is seen as less responsive to tech workforce needs, not nimble, and not incorporating the teaching of advanced technologies quickly enough. Overall, the entire education and training continuum is too often disjointed with frequent "turf protection."

A key factor in talent attraction and retention is the **quality of life** offered for tech workers. Overall, stakeholders find Oklahoma's quality of life to be fairly attractive, especially in urban areas where civic investments have paid off. Housing prices and general affordability are excellent advantages, as are "no traffic," plentiful outdoor recreation and parks. And often-heard remark was that IF people from other states visit Oklahoma, they love it. Getting them to visit can be tough, though.

Public K-12 education is seen as the biggest quality of life negative, making it hard to attract or develop talent. For skilled tech workers, the other significant negative is the relatively shallow depth of job opportunities, since those considering relocation are always concerned about "the next" opportunity. In luring tech talent it also "doesn't work to sell that we're cheap" [a cheap place to live].

We asked stakeholders about what is needed to spur more **startups and small business growth** in the state. The greatest number cited a lack of venture capital and angel investor funding, especially in-state VC that is knowledgeable about emerging technologies. There are few successful tech leaders ("founders") in the state to create spinoffs and participate in VC funds. More connections with external capital would be beneficial. Interviewees believe that the basics of a good entrepreneur ecosystem exist, but stronger connections between government, education, and business are needed for it to thrive statewide.

Tech leaders urge the creation of a stronger research and development (R&D) focus, especially related to promising tech niches in Oklahoma. Universities are described as too controlling and bureaucratic in their tech transfer and commercialization efforts. Likewise, state programs to help small businesses innovate come with too many strings attached. Simpler, straightforward programs are needed to "get more shots on goal."

Of the toughest **challenges that Oklahoma tech companies face to compete and grow**, the lack of business capital tops the list. This is followed by the challenge of finding experienced, higher-level tech talent. Stakeholders stress the need to invest more in the state's education system. Others suggest that small and mid-sized manufacturers in particular would benefit from more assistance with steps to increase productivity.

Numerous interviewees mentioned **promising programs and policies in other states** to improve tech sector support. States cited more than once include:

- Texas – putting serious money into aerospace and its new space commission
- Indiana’s regional grants and encouraging angel investments
- The Missouri Chamber’s effective Technology Alliance
- Tennessee and its Launch TN public-private partnership
- North Carolina – with the land, infrastructure, labor, and incentives to win advanced manufacturing projects.

Another promising idea is from states like Utah that have created regulatory “sandboxes” that encourage business innovation with a reduced regulatory burden.

We asked tech leaders, given all of the **issues that affect Oklahoma’s competitiveness**, which they would focus on **to move the needle**. They prioritized these three:

1. Improving the public education system
2. Adding and/or strengthening tools to promote and “de-risk” R&D investment, like R&D tax credits or similar innovation tax credits
3. Bringing tech companies together regularly to share information and foster discussion that can lead to better statewide plans and policies.

Stakeholders also noted the importance of using scarce resources wisely by focusing on those tech niches in which Oklahoma has a competitive advantage.

The Oklahoma Technology Alliance is fairly new, and another crucial question for stakeholders was: What is the **most important role for the Alliance and State Chamber to play regarding tech sector competitiveness**? Aside from praise for what the Chamber is already doing, responses fell into three noteworthy categories.

1. Lead efforts to help define a vision for tech growth in Oklahoma. Bring business, government, and education together for strategic planning, aligning the ecosystem, and focusing resources on the state’s most promising opportunities.
2. Be a sector convener, bringing often-isolated tech groups and leaders together from across the state. Related suggestions include a) creating tech advisory boards by industry to influence state policies, and b) getting the CIOs of the state’s top ten employers together on a panel to discuss tech competitiveness and talent needs.
3. Change the narrative around tech and innovation in Oklahoma with positive stories about tech-related economic growth and the opportunities created for residents. Educate both the public and state legislators—in particular help legislators to understand the innovations coming from Oklahoma universities.

An equally important topic is the status of **state government efforts** to provide a positive environment for tech growth, and recommendations for improvement. A common concern is the current level of political polarization based on ideology and “imaginary problems.” Interviewees feel that the Department of Commerce lacks a coordinated tech development plan and sufficient funding. Some stress the need for a concerted effort to strengthen K-12 schools,



while others note that promoting Oklahoma as a “cheap, low tax state” is not the best way to attract tech investment and talent.

There was no clear consensus on recommendations for state level improvement, but the most important themes that emerged are:

- ✓ Focus on major investments in K-12 schools, university research and development, and infrastructure (especially roads).
- ✓ Simplify the process to ramp up university tech transfer and commercialization. The current tech transfer process is described as, at times, a bureaucratic “nightmare.” Faculty innovation should be aided, not controlled.
- ✓ Be the most business-friendly state.
- ✓ Specific program improvements—consider expanding the Aerospace Industry Engineer Workforce Tax Credit to other occupations and sectors; increase the Oklahoma Innovation Expansion program’s very short annual window.

The tribal nations, with their “massive” infrastructure investments, are viewed as good models for state action.

The final topic of stakeholder discussion asked about their **vision for a more competitive Oklahoma tech sector**. In ten years, if Oklahoma succeeds in increasing its tech competitiveness, what will look different? What will be better? These are the top responses:

- ✓ Oklahoma will be known as a tech hub in a few specialized areas in which it has an advantage (such as in drones, space, new energy, weather, autoimmune diseases). It will have a robust R&D pipeline in those niches.
- ✓ Oklahoma will have an aligned tech vision and plan. This will enable us to build more complete clusters in our strongest niches (a positive example being Shenzhen, China).
- ✓ Oklahoma will have made key, major investments in education and infrastructure.
- ✓ Oklahoma will be an attractor for tech talent and business, bringing in more outside tech companies.

Other positive visions include building a stronger combination of R&D and advanced manufacturing, and being viewed as the most business-friendly state.

Interviewees suggested potential metrics of success including a) patents issued; b) startup company retention and small business growth rates; c) rising state education rankings; and d) rising state household income rankings, with household incomes growing over the rate of inflation. Another aspirational measure is having an AAU member university.

SECTION 5 – TRENDS IN KEY TECH SECTORS FOR OKLAHOMA

In this section we briefly summarize national and global trends for sectors of primary importance to the Oklahoma Technology Alliance, including industry growth prospects, areas of innovation, and challenges that could impede success.

Aerospace and Defense (including Drones)

The aerospace and defense (A&D) sector is a large global industry with robust growth expected at an annual rate of more than seven percent through 2030. In the US, the Aerospace Industries Association estimates that the sector is evenly divided with commercial aerospace comprising 51 percent of employment while defense and national security account for 49 percent.^{vi} Nearly every aspect of A&D is growing—and with a heavy focus on innovation. This includes:

- Commercial aviation that has a multi-year backlog for new aircraft; sources report a backlog of more than 15,000 planes (about 11 years' worth) just from Boeing and Airbus.^{vii}
- Commercial aircraft maintenance, repair, and overhaul (MRO) that is more important than ever with the extended life of existing fleets. MRO increasingly uses automation to detect repair needs.
- General defense activities due to geopolitical instability, with the US Department of War requested budget for FY2026 showing an increase of 13.4 percent from the prior year.
- Numerous commercial and defense uses for uncrewed aircraft systems, also called unmanned aerial vehicles or drones. Trends in this subsector will be further described below.
- Tremendous investments in space (including satellites, telescopes, exploration, and missile detection systems) for military and commercial applications.

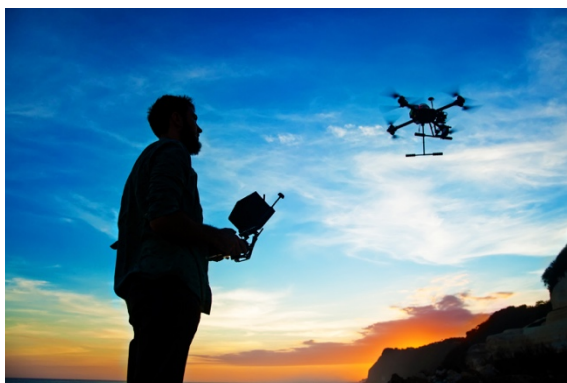
Aerospace and defense's contribution to US GDP rose by 12.9 percent in 2025. Industry activity is far from domestic-only, as US exports increased by 25 percent last year to reach \$173 billion. The fact that jobs in the sector pay about 40 percent over the national average adds importance to A&D as an economic driver for states and the country.^{viii}

The **drone** subsector is, if anything, growing more rapidly than the rest of aerospace and defense. Projections suggest a compound annual growth rate of

Priority Technologies for the U.S.

A 2026 book edited by an MIT Sloan School of Management professor calls for greater domestic investment in six areas critical to US innovation leadership:

1. Advanced Manufacturing
2. Drones
3. Biomanufacturing
4. Quantum Computing
5. Semiconductors
6. Critical Minerals



more than 16 percent from 2026 to 2034. North America leads the global market with a 34 percent market share, driven by rapid adoption of drone technology for defense, surveillance, and logistics uses.^{ix} Despite North American and US leadership (especially in military applications), however, a 2025 report by Georgetown’s Center for Security and Emerging Technology writes that the commercial drone market is “now dominated by lower-cost, dual-use platforms, many produced by Chinese companies.”^x

Oklahoma scores near the top in evaluations of drone development in the United States. In a 2023 ranking of states for commercial drone readiness, Oklahoma was ranked 2nd behind only Arkansas. These were followed by North Dakota and (tied for 3rd) North Carolina, Georgia, and Arizona.^{xi} An earlier 2021 state drone preparedness study placed Oklahoma 3rd, behind North Dakota and Arkansas and ahead of Nevada and Virginia.^{xii}

As of June 2026, there were nine FAA unmanned aerial system (UAS) test sites across America. There is a UAS test site in Oklahoma (Choctaw Nation) as well as in Alaska, Indiana, Nevada, New Mexico, New York, North Dakota, Texas, and Virginia.

Energy

After 15 years of practically flat energy consumption in the US, demand has grown by more than two percent annually over the last five years. The US Energy Information Administration projects—perhaps conservatively—that energy use will increase by 0.9 percent to 1.6 percent annually through 2050, with data centers a major factor.^{xiii} A new report by the Stanford Emerging Technology Review predicts even faster growth globally, a total increase of 16 to 25 percent in the next five years, “straining grid capacity and necessitating new generation.”^{xiv}

Stanford writes that the US energy stance has shifted from “climate urgency to energy dominance.”^{xv} Due to federal policy changes, wind and solar investments have dropped significantly since the start of 2025. Fossil fuels remain an important part of the mix, with demand for them forecast to plateau between 2030 and 2035. The Stanford report states that although “many clean energy technologies are now available and increasingly affordable, scaling them up and building the infrastructure for them will take decades due to infrastructure inertia, stakeholder complexity, and the energy *trilemma*” of needing to balance reliability, affordability, and cleanliness.^{xvi}

The following emerging energy technologies are of particular note:

- **Iron-Air Batteries** as a lower cost, higher storage duration solution (compared with lithium-ion batteries) for storing energy from intermittent wind and solar sources.
- **Electric Vehicles**, although momentum has paused in the US, continue to surge in popularity across the world. The Chinese, who dominate in EV batteries, are announcing sizable improvements in battery range and charging times.
- **Small Modular Nuclear Reactors** for dedicated uses such as at data centers. US national laboratories, universities, and several companies are working to deploy this technology.

- Other promising new energy sources include **green hydrogen** (although this is unlikely to see widespread adoption before 2040) and **nuclear fusion** for which recent demonstrations have shown energy output gains but where “much higher gains are needed for commercial viability.”^{xvii}

Agriculture Technology

AgTech innovation and applications continue to grow worldwide, with analysts expecting annual market growth of 12 to 15 percent, becoming a roughly \$50 billion industry by 2030. The US and North America lead in capital investment and adoption of new technologies, and US firms capture an estimated 40 percent of the worldwide smart agriculture equipment market. The Asia Pacific region is making the fastest gains in AgTech adoption.



Important AgTech trends and technologies include:

- Agriculture Technology as a Service— access to new technologies by subscription, allowing smaller farms to use the latest innovations without high upfront costs
- AI and the Internet of Things (IoT) for agriculture, such as IoT sensors for precise monitoring and AI-based water management
- Autonomous Tractors and Harvesting or Weeding Robots
- Biological Pest Control and Sustainable Soil Management.

While AgTech adoption in the US is high, the recent focus is on those technologies that consistently deliver the best returns on investment. More thorough data analysis should lead to farmers employing the best technologies for their needs.

Innovation hubs in the US include North Carolina and its Research Triangle AgTech Cluster, and California which enjoys a major concentration of AgTech venture capital investment. In 2024 a North Carolina coalition of universities and institutions received a \$1,000,000 NSF Regional Innovation Engines grant, and in 2025 the coalition announced a plan to create a 42-county AgTech innovation corridor.^{xviii}

Elsewhere, university initiatives to drive innovation include the University of Missouri’s Digital Agriculture Research and Extension Center, launched in 2024 to speed farm adoption of digital tools, and its Precision and Automated Agriculture Lab (PAAL). PAAL focuses on automation via sensing technologies, mechanical and robotics technologies, and emerging technologies in livestock management.

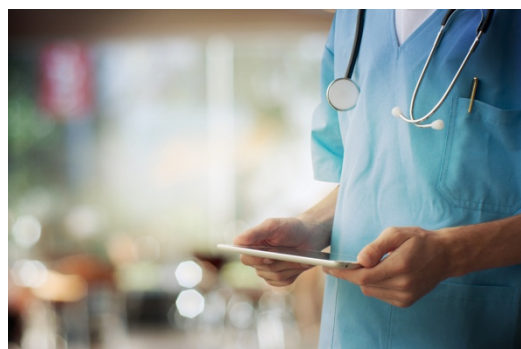
Healthcare and Medical Technology

With the US healthcare system experiencing “unprecedented cost pressures,”^{xix} the sector is aggressively adopting technologies of all kinds, from care management software to AI and wearable devices. In a survey conducted by Deloitte, three of the top five strategic priorities for healthcare

leaders in America for 2026 were directly tech related: a) incorporating generative AI and agentic AI; b) transforming care delivery (especially by increasing virtual and remote care delivery); and c) addressing cybersecurity and data privacy.^{xx}

According to Deloitte, only 38 percent of US healthcare spending is related to prevention, early detection, and general wellness. The focus on transforming care delivery aims to boost this share. Virtual care and early detection efforts appear to be popular with consumers, with over 90 percent of patients who've had a virtual visit being willing to have another. Also, 47 percent of consumers use health tracking and fitness devices and 37 percent use specific health monitoring devices.^{xxi} Telehealth will likely be boosted by the \$50 billion Rural Health Transformation Program, authorized by the One Big Beautiful Bill Act in 2025.

Integration of AI into medical care is rapid but not always a smooth path. A recent article in Forbes asserts that "US healthcare outpaces nearly every other industry sector in the rate of AI adoption." However, the author sees this "latest cure-all" for out-of-control medical costs likely to be "challenged and problematic" in many areas of medicine, largely due to legacy operators and processes that are slow to change.^{xxii}



In addition to powerhouse biotech hubs like Boston, San Francisco, Philadelphia, and San Diego, a number of emerging hubs are being recognized nationally. These include Minneapolis, Houston, Indianapolis, Baltimore, and Phoenix. A July 2026 article suggested Oklahoma City as an up-and-coming location, citing its public-private partnerships and BioTC workforce training program.^{xxiii}

Data Centers

No tech-related economic development story is as widely discussed as the US data center boom, heavily influenced by mushrooming applications for AI. A report from April 2026 found more than 700 new centers under construction and nearly 3,100 announced across the United States. State leaders for data centers under construction or announced are 1) Texas, 2) Virginia, 3) Georgia, and 4) Pennsylvania, each with more than 200. Arizona and Illinois are close behind.^{xxiv}

Where centers used to be clustered together in certain metropolitan areas, developers and hyperscalers are now looking anywhere in the US with available and reasonably priced land, ample electric power and water supplies. Rural areas are now desirable locations for siting new centers. In July 2025, CNBC ranked these as the US states best positioned to host data centers in terms of electricity pricing, electric grid reliability (outages), and the share of renewables in their energy mix:

- | | |
|-----------------|-----------------------------|
| 1. Washington | 6. South Dakota |
| 2. New Mexico | 7. Utah |
| 3. Montana | 8. Wyoming |
| 4. North Dakota | 9. Iowa |
| 5. Idaho | 10. Nebraska ^{xxv} |

Data centers are the most controversial projects in America today, perhaps due to the breakneck pace of expansion, site searches that are evaluating every corner of the nation, and concerns about

residential electricity costs. However, they are also valued by states and local communities for their tremendous contributions to tax base and revenues, and for the well-paying (though small number of) jobs they create.

This dichotomy is evidenced by, on one hand, 15 state legislatures proposing moratoriums or other bans on data centers this year (as of June 1, 2026).^{xxvi} But on the other hand, 36 states still offered tax incentives to attract data centers as of December 2025.^{xxvii} Some states with strong infrastructure are determined to capture their share of data center investments. Early in 2026, Nebraska Governor Jim Pillen cited the importance of state energy capacity, grid flexibility, and regulatory speed and promised “Nebraska will win the electricity and AI power game.”^{xxviii}

Tech Transfer and Commercialization

To facilitate the movement of innovation from university faculty and students to the marketplace, nearly all research universities now have an office of technology transfer or commercialization. The spinoff of ideas into private companies that become huge successes is rare, but there are notable examples: Cisco and Google (Stanford), Moderna and Biogen (MIT and Harvard), and Genentech (UC San Francisco).

Benefitting from close partnerships with Silicon Valley firms, Stanford is often cited as a leading example of tech commercialization success. A 2024 article stated that spinoffs from Stanford have resulted in nearly 40,000 new companies and 5.4 million jobs. If Stanford-born firms were a country, the author claimed, it would be the world’s 10th largest economy.^{xxix}

A 2022 study from Heartland Forward listed these as the nation’s top 10 schools for tech transfer:

- | | |
|--------------------------|-----------------------------|
| 1. Carnegie Mellon | 6. Penn |
| 2. University of Florida | 7. North Carolina State |
| 3. Columbia | 8. UC San Diego |
| 4. Stanford | 9. UCLA |
| 5. Harvard | 10. University of Minnesota |

Although most of the top commercialization programs are located in large coastal metros that serve as tech industry hubs, there are exceptions. These include Carnegie Mellon in Pittsburgh, the University of Florida in Gainesville, and the University of Minnesota in Minneapolis.

Heartland Forward provided a separate top 25 ranking of public universities. Those from the Midwest were Minnesota (5th), Purdue (6th), Michigan (7th), Texas (9th), Houston (19th), Wisconsin (21st), Kansas (24th), and Iowa State (25th).^{xxx}

An evaluation from 2025 includes a few different names in the top 10 such as the University of Colorado – Boulder.^{xxxi} Its Venture Partners team offers initiatives like a \$125,000 Lab Venture Challenge for ideas from three Colorado campuses that “address a commercial need, have a clear path to a compelling market and have strong scientific support.”^{xxxii}

In recent years, tech commercialization offices have been criticized for being too bureaucratic, too controlling, and more interested in the university getting its cut than in promoting a strong flow of innovation to the marketplace. Longtime entrepreneur and tech transfer observer Paul O’Brien wrote

in late 2025 that the system is “broken,” asserting that “universities aren’t commercializing innovation, they’re taxing it.” “You cannot tax something into existence,” he said, “You cannot committee your way to entrepreneurship.”^{xxxiii} O’Brien also noted that most university tech transfer offices are losing money.

Entrepreneur ecosystem analysts urge states and universities to reform tech transfer by creating offices that more actively assist faculty and students with converting marketable ideas into spinoff companies, that have streamlined agreements for intellectual property and inventor rewards, and that build deeper relationships with the tech private sector.

State Performance in Tech Industries and Innovation

In 2026, WalletHub evaluated the nation’s most and least innovative states based on 25 factors of “innovation friendliness.” Factors considered under the categories of human capital and innovation environment included:

Innovation Environment

- Patents per capita
- Gross state product (GSP) in tech as a percentage of overall GSP
- Entrepreneur activity
- Venture capital funding
- Tax friendliness
- Net migration

Human Capital

- Share of STEM professionals
- Projected STEM job demand
- AP exam participation
- 8th grade math & science scores

In the WalletHub study, Washington DC ranked as most innovative followed by Massachusetts, California, Colorado, and Washington. Oklahoma neighbors Texas and New Mexico placed 13th and 15th. Oklahoma ranked 43rd, placing 33rd in innovation environment and 46th in human capital.^{xxxiv} As the study’s author concluded, top-ranking states “continue to foster innovation by investing in education, research, and new business formation, particularly within highly specialized industries.”^{xxxv}

In CNBC’s Top States for Business evaluation for 2026, Oklahoma was third in the nation for the lowest cost of doing business, but ranked 30th in the technology and innovation category (which considers factors like R&D funding and patents per capita), 42nd in workforce, and 39th overall. Neighboring states Texas and Colorado both ranked in the top 10 for technology and innovation by CNBC.^{xxxvi}

The US-based non-profit Information Technology and Innovation Foundation (ITIF) claims to be the “world’s leading think tank for science and technology policy.” In 2025 the ITIF’s Hamilton Center on Industrial Strategy released an evaluation of national and state performance in advanced industries. This study measured the concentration of employment in seven key industry sectors:

- | | |
|-----------------------------|--|
| • Electrical equipment | • Information technology |
| • Machinery and equipment | • & information services |
| • Motor vehicles | • Computer, electronic, and optical products |
| • Other transport equipment | • Pharmaceuticals and biotechnology. |

The ITIF summarizes the global situation this way: “Once the leader in the production of advanced technologies, the United States now finds itself with less capabilities than the global average.”^{xxxvii} Only four US states had a greater concentration of advanced industries than the worldwide average, while just one state—Washington—had a higher concentration than China. The top five states were Washington, Virginia, Indiana, Michigan, and California.

In this analysis, Oklahoma placed 40th (excluding Washington, DC) for employment concentration in advanced industries. Ranks for peer competitor and neighboring states were:

- | | |
|------------------------------|-------------------------------|
| • Indiana 3 rd | • Missouri 16 th |
| • Tennessee 29 th | • Arizona 38 th |
| • Kansas 8 th | • Colorado 19 th |
| • Texas 32 nd | • New Mexico 46 th |
| • Iowa 9 th | • Nebraska 28 th |
| • Arkansas 33 rd | |

Oklahoma showed the greatest strength, with above-average employment concentration, in machinery and equipment as well as in electrical equipment. It had below-average concentration in the other five sectors.

ITIF’s policy recommendations included strategies to improve collaboration and coordination between firms to develop regional innovation hubs.^{xxxviii}

Another recent study listed the top states for digital innovation in areas like AI, cloud computing, and fintech. It evaluated states on factors such as digital economic impact, VC funding, business incubators, and government tech hubs. For digital innovation, the top five states as of 2025 were California, New York, Washington, Illinois, and Massachusetts. Neighboring Missouri (6th), Texas (8th), and Colorado (10th) made the top 10.^{xxxix}

Peer States, Their Strengths and Best Practices

For this work, the Oklahoma Technology Alliance identified peer and aspirational comparison states that included neighboring states, those that represent frequent competition for tech-related economic development projects, and others with proximity to major Midwestern metropolitan areas. These 11 peer states are:

Texas	New Mexico	Tennessee
Kansas	Missouri	Indiana
Colorado	Nebraska	Iowa
Arkansas	Arizona	

Below is a brief summary of these states’ strengths in advanced technology industries and some of the policies and practices that help them succeed.

Texas is investing in innovative technologies across a wide range of sectors, as evidenced by Texas’ rank as the 13th most innovative state by WalletHub in 2026 and being named one of the top 10 states for digital innovation. In 2026, CNBC rated Texas as the 4th best state for business overall, 1st in

the workforce category and 3rd best in technology and innovation. Texas has attracted huge investments in semiconductors (Samsung, Texas Instruments) and aerospace (SpaceX). Among the actions that are spurring economic success for Texas:

- The state's JETI (Jobs, Energy, Technology, and Innovation) incentive act that became effective in 2023. JETI rewards capital-intensive tech projects and makes it easier for projects in small, rural counties to qualify. Recent examples include the \$1.6 billion Summit Next Gen sustainable aviation fuels project in Galena Park and the \$185 million Brazos Midstream natural gas facility in the Midland Basin.
- Texas "is on track to surpass Virginia as the top US data center hub," with 750 centers under construction or announced as of early 2026.^{xl} One reason is its increasingly diverse energy mix, not just oil and gas but wind and solar. Texas has the largest renewable energy industry in America. The Competitive Renewable Energy Zones (CREZ) initiative that launched in 2005 promoted wind energy and transmission line development in west Texas and the Texas panhandle.

Kansas is known as a longtime aviation hub. It ranked 8th nationally in the ITIF study of advanced tech industries with above-average strength in five of the seven sectors. Kansas also placed 3rd for business friendliness (focusing on states' regulatory and legal framework) in CNBC's Top States for Business 2026. Industry innovation assets in Kansas include:

- The National Center for Aviation Training (NCAT) at Wichita State University. The 220,000 square foot facility has training labs for technology areas such as advanced coatings, composites and materials, additive manufacturing, and robotics and automation.
- Wichita State's Innovation Campus, which won the national Emerging Research Park Award in 2023. Companies like Airbus have established engineering centers at the Innovation Campus to speed research and commercialization of new technologies.
- The new National Bio and Agro-Defense Facility in Manhattan, built in conjunction with the USDA and the US Department of Homeland Security to protect the nation against serious animal diseases.

Colorado, an important state for aerospace and defense, boasts a population with high educational attainment especially in STEM fields. The state was named the 4th most innovative by WalletHub in 2026 and also scored recent top 10 ranks in technology and innovation (by CNBC) and for leadership in digital innovation.

Colorado offers a slate of Advanced Industries Accelerator programs in sectors including aerospace, advanced manufacturing, energy, and biosciences. It provides an Advanced Industry Investment tax credit of 25 percent, or 35 percent in rural areas. Colorado's Early-Stage Capital and Retention grant offers businesses up to \$250,000 to help commercialize advanced technologies.

Arkansas fared poorly in the 2026 ranking of most innovative states, coming in 46th. In the ITIF study of advanced industries, it did perform better than Oklahoma, ranking 33rd compared with 40th for

Oklahoma. Arkansas has adopted some ambitious measures to spur more tech-related business innovation:

- Two acts approved in 2017 created the Arkansas Business & Technology Accelerator grant program and SBIR state matching grants. The accelerator program provides grants up to \$250,000 per organization to mentor and foster the development of startup tech companies. The SBIR grants match up to half of a federal SBIR award, up to \$50,000 for Phase I awards and \$100,000 for Phase II awards. Arkansas also has a small tech transfer grant program to fund the transfer process from a university to private business.
- In 2015, Arkansas became the first state to pass a “truly comprehensive law” requiring all public schools to offer computer science courses.^{xli}

New Mexico, as the home to Los Alamos and two other national research laboratories, frequently leads the US in federal R&D funding per capita. These assets helped New Mexico rank as the 15th most innovative state in the 2026 WalletHub analysis. To help protect this innovation advantage (and given the uncertainty of federal funding streams), in 2025 the state established the NM Technology and Innovation Office (TIO). NM TIO provides sector-specific business assistance in four of the state’s most important industries via agreements with outside contractors. The four key sectors are:

- Aerospace
- Bioscience
- Advanced Energy
- Advanced Computing (Quantum)

New Mexico also boosts tech companies and jobs in the state through its sovereign wealth funds (benefitting from oil and gas revenues), managed since 1958 by the State Investment Council. In 1990 the Council was authorized to invest in private venture capital funds, leading to the New Mexico Strategic Venture Capital Program. In the last three years the state has committed \$1.8 billion through private VC funds investing in firms born in New Mexico or moving into the state. The state’s VC investments are focused in the areas of 1) aerospace and defense, 2) advanced energy, and 3) deep tech such as quantum, AI, robotics, and advanced materials.^{xlii}

Missouri has multiple strengths in its advanced technology economy, ranking in the top 20 for advanced tech industry performance in 2026 and among the top 10 digital innovation states in 2025. It was shown to be among America’s fastest-growing states for tech manufacturing in a 2024 report.

Missouri has achieved notable success in preparing the next generation of tech workers. With the help of a major US Department of Labor grant, the Missouri Chamber’s Industry-Driven IT Apprenticeship program created over 4,500 new IT apprentices across the state from 2020 to 2025. Sixty-two percent of participants were under the age of 25 and 39 percent were female. The average salary of apprentices was \$63,000.

Another long-term asset for supporting tech businesses is the Missouri Technology Corporation (MTC), established as a public-private nonprofit in 1994. MTC activities include venture capital investments through its IDEA fund, with three program levels to match the growth stage of Missouri firms. Another primary program area for MTC is improving the entrepreneurial ecosystem, with efforts to address business’ physical infrastructure needs (such as wet labs and greenhouses) and to strengthen seven regional nodes.

Nebraska has particular tech industry strengths in the areas of software, IT, and AgTech. It placed in the middle of the pack—28th—in the 2025 ITIF state evaluations of advanced industry performance. Nebraska received a top 10 ranking for business friendliness (considering factors such as the state’s regulatory and legal climate) from CNBC in 2026, and has made significant gains in extending broadband access across the state.

The Nebraska Business Innovation Act (BIA) was adopted in 2011 and provides capital to support entrepreneurial growth through programs such as a seed fund/commercialization grant and a prototyping grant. A 2024 analysis by the University of Nebraska-Lincoln found these returns on the state’s \$57 million total investment to date:

- \$11.52 in private funding raised for each \$1 of BIA funding
- \$15.90 in company revenue earned for each \$1 of BIA funding
- 2,386 direct jobs created with an average salary of \$76,498.^{xliii}

The University of Nebraska report also points to a surge in venture capital funds flowing to the state since 2019.

The Omaha-based Aksarben Foundation launched the Nebraska Tech Collaborative in 2019 to help develop, retain, and attract tech talent throughout the state. The Tech Collaborative works with tech employers on workforce initiatives including career fairs, a Women in Tech Summit, and student internships.

Arizona, a frequent economic development competitor with Oklahoma, ranked 17th in the 2026 innovation study by WalletHub and was 14th overall in CNBC’s latest Top States for Business. Arizona is an important player in aerospace and defense as well as computers and electronics.

To meet the demand for a qualified tech workforce, Arizona has created a network of Future48 Workforce Accelerators with different community colleges focused on specific tech skill needs in their region. There are Workforce Accelerators dedicated to aerospace and defense, advanced manufacturing, semiconductors, and batteries.

In 2025, Arizona opened the Office of Defense Innovation (ODI), a public-private collaboration between the Arizona Commerce Authority and the Phoenix-based nonprofit Mission Acceleration Center. The ODI will concentrate on building up the national defense mission in Arizona, growing private sector aerospace and defense, and supporting the development of dual-use technologies.

Tennessee placed 9th overall in Top States for Business by CNBC in 2026, ranking within the top 10 for workforce, business friendliness, infrastructure, and cost of doing business. Among advanced industry sectors, Tennessee is a leading state for motor vehicle manufacturing and has a strong concentration in electrical equipment. Tennessee is undertaking several initiatives to convert its manufacturing prowess into greater research and development activity. Among these:

- The TEAM TN (Tech-Enhanced Advanced Mobility) effort leverages auto manufacturers and the world’s fastest supercomputer at Oak Ridge National Laboratory to develop new mobility technologies in 10 areas including onboard intelligent applications, vehicle-to-vehicle communications systems, and transportation network sensors. Stakeholders in TEAM TN include

Ford, GM, Bosch, Amazon Web Services, the University of Tennessee-Knoxville, and Oak Ridge National Laboratory.

- The state’s economic development office is increasing recruitment of R&D operations that can capitalize on the Chattanooga Quantum Collective and Oak Ridge National Lab.
- Tennessee’s new IRIS (Innovation & Research for Industry Success) grant program awards a minimum of \$250,000 for R&D partnerships between industry and research universities for product prototyping, development, validation, and related projects.
- The Tennessee Innovation Exchange, launched in April 2026, is an online platform to highlight the R&D expertise at Tennessee universities that companies can tap.

Indiana ranked 3rd best in the nation in the 2025 evaluation of advanced industries by ITIF. It showed real strength through high concentrations of activity in four of the key sectors:

a) motor vehicles; b) electrical equipment; c) machinery and equipment; and d) pharmaceuticals and biotech. In 2026, CNBC rated Indiana as having the 2nd lowest cost of doing business.

To support innovation by Indiana tech companies, the state legislature established the 21st Century Research & Technology Fund in 1999 and has funded it consistently since. The 21st Century fund in turn provides capital to Indiana-based, Midwest-focused VC firms like Elevate Ventures and Roll Tack Ventures. In 2026, the state Secretary of Commerce stated that these investments allow Indiana “to align public capital with private market discipline” and to “strengthen the state’s long-term innovation strategy while maintaining a focus on stewardship and measurable outcomes.”^{xliv}

Indiana also offers a 25 percent Venture Capital Investment Tax Credit, a new Career Apprenticeship Pathway recruiting its first cohort of high school students in 2026, and the Indiana Certified Technology Park program to support attraction of life sciences and other high-tech industries.

Iowa ranked 9th in the ITIF evaluation of advanced tech industries and showed above-average strength in five of the seven sectors, especially in machinery and equipment and electrical equipment. Two of the state’s key industry focus areas are advanced manufacturing and biosciences (which includes crop genetics and animal health). Advanced manufacturing is Iowa’s largest economic contributor, accounting for 17 percent of state GDP. Iowa has the nation’s largest concentration of machinery manufacturing employees.

A common issue for smaller manufacturers is the cost and technical details of incorporating new technologies into their manufacturing processes. Iowa helps small and mid-sized companies (up to 125 employees) through the Manufacturing 4.0 Technology Investment Program. The program provides up to \$75,000 toward the purchase of equipment such as robots, 3D printers, Internet of Things-related server equipment, cybersecurity software, predictive maintenance software, shop floor sensors, and more. To measure the company’s ability to integrate automation, an Industry 4.0 readiness assessment conducted by the Iowa State Center for Industrial Research and Service is a required part of every application.

SECTION 6 – BEST PRACTICES FOR STATES TO SUPPORT ADVANCED TECH INDUSTRIES AND JOBS

In this section, we summarize many promising practices that states, universities, and organizations are employing to improve tech sector competitiveness. These practices are grouped by the issues that Oklahoma stakeholders say are the biggest challenges to helping the state thrive in the global advanced technology economy.

1. Tech Workforce

Oklahoma tech leaders identified the K-12 education system and tech talent pipeline as the number one priority for strengthening the state’s advanced technology competitiveness. A major focus is STEM exposure and pathways for school students. Another concern is upskilling existing workers and their tech literacy. Here’s what other states are doing:

- ★ **Texas’ STEM Framework** and toolkit and the **Space Florida Academy** model curriculum are two successful examples of statewide curriculum guides. The Texas STEM Framework provides an integrated PreK-20 guide for high-quality STEM education, while Florida’s credential-oriented curriculum has been adopted by 40 school districts for their high school CTE programs.
- ★ The **Arizona Future48 Workforce Accelerators** are customized partnerships between a community college and nearby employers to build the talent pipeline for a specific industry. There are workforce accelerators for aerospace and defense, semiconductors, and advanced manufacturing.
- ★ With AI literacy in the workplace quickly becoming vital, state organizations are addressing the need. The **Virginia Chamber** produced a statewide AI readiness assessment in 2025 and is preparing training programs for existing workers. The **Indiana Technology & Innovation Association’s** 2026-27 policy priorities stress AI literacy for Indiana students.
- ★ The state of **Washington** is at the forefront of efforts to increase digital and tech literacy among existing workers, with legislative funding in 2024 to develop a statewide **Workplace Digital Literacy Credential**. The Washington Workforce Board has also proposed a **Rapid Response Skills Gap** program. This would provide funds for businesses to partner with workforce organizations to solve technical and digital skill gaps among their employees.
- ★ In **North Carolina’s** Research Triangle biotech hub, the nonprofit Made in Durham aligns Durham’s education-to-career system to improve economic mobility. Made in Durham’s flagship program is the **BULLS Life Sciences Academy** to prepare young people for the biotech



manufacturing workforce.

- ★ The **Missouri Chamber's Industry-Driven IT Apprenticeship** initiative has resulted in 4,500 apprentices ready to work in the state's IT industry since 2020.
- ★ **GO TEC** is a **Virginia** initiative to develop STEM interest and expertise in middle schools, high schools, dual enrollment and post-secondary programs. Career Connections Labs are now found in about 75 Virginia middle schools. Pathways are available in areas such as precision machinery, automation and robots, energy, healthcare technologies, and electrical engineering.
- ★ **Tech-Ready Apprentices for Careers in Kentucky, or TRACK**, has grown since its launch in 2013, succeeding by embedding tech and skilled trade pre-apprenticeships in high school CTE programs across Kentucky.

2. Bigger Bets on the Most Promising Sectors

States and state-level organizations have limited resources to deploy to boost economic competitiveness. As a result, they must focus efforts on growing sectors that fit best with state strengths. The examples below represent entities and programs to promote innovation in the industries that represent a state's best bet(s).

- ★ The Texas legislature established the **Texas Space Commission** in 2023, and the following year allocated \$150 million for it to spur R&D and innovation through Space Exploration and Research Fund (SEARF) grants.
- ★ The **North Carolina Biotechnology Center** was created by the General Assembly in 1984 and now supports 860 life sciences companies employing 76,000 people across the state. The Research Triangle metro region ranks among the nation's top five life sciences hubs.
- ★ **Colorado's Advanced Industries Accelerator Program** was launched in 2013 to spur innovation in the state's seven priority sectors: advanced manufacturing, aerospace, bioscience, electronics, energy, IT, and infrastructure engineering. It offers four grant programs in areas including early-stage capital and proof of concept applied research.

3. R&D Focus

Oklahoma stakeholders emphasize the importance of developing research and development expertise in the technology niches where the state has a competitive advantage. Competitor states are being intentional to more closely link their key industries with university R&D capabilities.

- ★ **Tennessee's Innovation & Research for Industry Success or IRIS** program encourages mature firms to partner with one or more of 14 research institutions to develop innovative technologies. IRIS focuses on eight targeted sectors and helps fund activities such as applied research, prototyping, technical modeling and simulations. The minimum IRIS grant is \$250,000.

4. Statewide Environment for Innovation

An important consideration for tech competitiveness is: how well does the state provide an overall environment that promotes innovation and risk-taking? How severe is the state's regulatory burden?

- ★ The Mercatus Center at George Mason University measures state regulatory burdens. Its latest rankings show that Idaho, South Dakota, North Dakota, and Montana have the fewest rules, in some cases one-tenth the total of heavily regulated states like California, New York, and New Jersey. Oklahoma has the 17th most state regulations with more than 142,000 rules.^{xlv} States taking action to reduce regulations include Idaho, Kentucky, Virginia, and Arizona.
- ★ A reform specific to business innovation is creating what is known as a “**regulatory sandbox**.” With a regulatory sandbox, a state will suspend applicable regulations for a period of time (often one to three years) to give businesses time and flexibility to determine if a new idea or technology has market potential. Sandboxes can either be industry-specific or universal. Examples of state legislation creating a universal sandbox:
 - Kansas HB 2291 in 2025
 - Missouri SB 894 in 2024
 - Utah HB 217 in 2021.

5. Tax Credits to Spur Innovation

Oklahoma stakeholders consistently note the need to develop greater tech R&D expertise and expand the innovation pipeline. One way to encourage tech innovation among in-state businesses is by providing targeted state tax credits related to R&D and small firm growth. Important examples include:

- ★ **R&D Tax Credits.** As of mid-2026, 39 states offer an R&D tax credit, including all adjacent states and all other identified competitors except Tennessee. Peer states Missouri, Nebraska, Arizona, and Arkansas provide credits equaling at least 15 percent of expenditures, while credits in Nebraska, Missouri, and Texas are also refundable for newer, smaller companies with little taxable income.
- ★ **Angel Investor Tax Credits.** States helping to reduce investor risk in local startups include Kansas, Tennessee, New Mexico, and Arizona. These provide angel investor tax credits of 25 to 50 percent, often limiting the credit to tech-oriented sectors.
- ★ **Venture Capital Tax Credits.** **Indiana** has offered a venture capital investment credit (currently 20 to 25 percent) since 2003.
- ★ **Iowa** offers a set of programs similar to the two categories above, with a **Seed Investor** tax credit and an **Innovation Fund** tax credit.
- ★ States encouraging modernization and adopting new technologies in the **agriculture** sector include **Nebraska (Livestock Modernization tax credit)** and **North Dakota (Automation tax credit)**.

6. State-Directed Venture Capital Investments

Several states are boosting local economic innovation by directing more dollars from sovereign wealth and other permanent state funds into local tech company investments. **Utah’s Nucleus Fund** focuses on “early-stage, deep-tech ventures emerging from the state’s universities and research institutions.” **New Mexico’s Strategic Venture Capital Program** invested \$1.8 billion from 2022 to

2025, partly to diversify the state economy and protect it from “the volatility of the oil and gas industry.”

7. Other Capital Sources to Grow Tech

States are increasingly creative with ways to guide resources to the most promising tech niches in their state economies.

- ★ The **Nebraska Business Innovation Act (BIA)** was enacted in 2011 to assist entrepreneurial firms with early-stage capital needs. By January 2025 it was found that every BIA dollar had leveraged \$11.52 in additional capital raised. Program analysis also showed that BIA fund recipients had created about 2,400 jobs generating \$182.5 million in annual wages.^{xlvi}
- ★ **Colorado’s** suite of **Advanced Industries Accelerator** programs is available for firms in the state’s seven targeted tech sectors. It provides four different grant funds and also assists Colorado small businesses with expanding exports into new markets.
- ★ Programs to match federal Small Business Innovation Research (SBIR) funds include **Arkansas’ SBIR Matching Grant** program, providing up to \$50,000 to match Phase I grants and \$100,000 for Phase II grants. Many peer states operate similar match programs.

8. Tech-Oriented Incentives

State incentive programs are responding to today’s high-tech projects that are characterized by massive capital investments and more modest job creation. A good example is **Texas’ JETI (Jobs, Energy, Technology, and Innovation) Act**. JETI program incentives are oriented toward advanced manufacturing, R&D, and energy generation projects. Qualifying capital investment and job levels are tiered so that it is much easier for a project to qualify in one of Texas’ less populous counties.

9. Helping Advanced Manufacturers to Modernize and Automate

A common tech challenge is the ability of existing manufacturers—especially small and mid-sized companies—to modernize and automate their processes for greater productivity, often referred to as adopting Industry 4.0 practices. Several states have effective programs to help their manufacturers increase competitiveness.

- ★ Since 2020, **Indiana’s Manufacturing Readiness** program has provided \$80 million in matching grants for more than 770 modernization projects in 85 counties across the state. The Indiana program is also one of the nation’s best-documented initiatives, with detailed information on the type, size, age, and location of companies, jobs and wages, and case study examples.
- ★ Other state initiatives include the **Iowa Manufacturing 4.0 Technology Investment** program and **Wisconsin’s Automation Implementation Grants**. Both states require companies to complete a technology readiness assessment in order to be considered for an implementation grant.

10. Supporting Energy Innovation

Some states are pursuing innovative strategies to get more out of mature oil and gas fields. Wyoming runs a state **Enhanced Oil Recovery (EOR) Institute**, and 2003 law exempting incremental EOR production from severance tax for five years helped launch two major projects. More recently it created a \$10 million fund paying up to \$10 per ton for CO₂ sold into EOR. North Dakota added a dedicated **EOR grant track** to its Oil and Gas Research Program and funded projects like \$2 million to recover oil from residual oil zones.



Another popular method for driving energy innovation and efficiency is through state clean energy funds or “green banks” that often join with the private sector to finance local energy projects. Midwestern states with government-established nonprofit energy banks include Missouri, Iowa, and Indiana. The **Nevada Clean Energy Fund (NCEF)** was created by the state legislature in 2017. It works with local energy contractors, lenders, developers, tribal nations, and others on projects like electric school buses and solar installations for multifamily and single-family residences. In 2026 NCEF launched a workforce accelerator offering training and career pathways to strengthen Nevada’s energy workforce pipeline.

11. Improving Tech Transfer and Commercialization

Across the US, states and universities are working to make the transfer of innovative ideas into the marketplace less bureaucratic and more helpful to faculty and students. Several good practices to increase the size and speed of the commercialization pipeline are described below.

- ★ **Create simplified, standard templates for public universities.** Ohio’s **IP Promise** launched in 2019 to provide a unified process for commercialization across all 14 public universities in Ohio. The IP Promise includes a standard option template and patent licensing agreement template, with the goal of making tech transfer “flexible, transparent, simple and fast.” **Nebraska** started on this path in 2025 with the **NUexpress License** for researchers at UN-Lincoln. The NUexpress agreement features no upfront license fees, delayed royalty payments, and two equity investment options.
- ★ **Reward faculty creating spinoff companies.** America’s most successful university commercialization story, **Stanford University**, asks for low university equity stakes of just one to five percent.
- ★ **Take a more active role in startup company development.** The **University of Minnesota’s Discovery Launchpad** offers free startup incubator services and helps inventors bridge the so-called “valley of death” between initial grant funding and outside private investment. The Discovery Launchpad features coaching by Entrepreneurs-in-Residence and a custom work plan for each company.
- ★ **Connect startups with potential investors.** Universities and other organizations provide information and networking connections between startups and in-state angel investors, venture

capitalists, alumni groups, and university-affiliated funds. Examples include the **University of Michigan's Innovation Partnerships** and, in **Utah**, the **Startup State Initiative** and nonprofit **Grow Utah**.

- ★ **Provide small tech transfer assistance grants.** States including Arkansas and New Mexico offer grants up to \$3,750 to cover part of the licensing costs for transferring a technology from a university to a private company in the state.
- ★ **Build a state culture of innovation.** **Launch TN** is a nonprofit public-private partnership created by the **Tennessee** legislature to boost startups through the three C's of Commercialization, Capital, and Connections. Launch TN hosts the 3686 entrepreneur conference annually in Nashville.



SECTION 7 – KEY TAKEAWAYS FOR OKLAHOMA’S TECHNOLOGY SECTOR

Oklahoma's technology sector tells two stories at once. It is already an outsized contributor to the state's economy: nearly five percent of jobs, but over ten percent of wages, fifteen percent of sales, and seventeen percent of gross state product. Its job multiplier of 3.08 is the highest of any industry in the state, meaning tech's true economic footprint (nearly 15 percent of total employment when indirect and induced jobs are counted) is three times larger than direct employment alone suggests. At the same time, Oklahoma is losing ground relative to other states on nearly every forward-looking measure: employment growth, R&D investment, patent activity, venture capital, and national innovation rankings. The state is not behind because tech doesn't matter here. It is behind because the infrastructure that turns today's tech presence into tomorrow's tech growth needs deliberate investment and coordination.

Seven takeaways emerge from this analysis:

1. Oklahoma's tech economy is bigger than its industry statistics suggest. Tech occupations (119,290 workers) outnumber tech industry employment (88,440) by more than 30,000, and 78 percent of tech workers are embedded in other industries, from manufacturing to finance to healthcare. Workforce and education strategy should be built around this reality; a plan that only targets tech companies misses most of the state's tech workforce.
2. Energy tech is Oklahoma's greatest concentration and its greatest vulnerability. At 3.26, Oklahoma's energy tech concentration is more than three times the national average and sixth highest in the country, but the subcategory is projected to lose jobs at an accelerating rate (down 6.8 percent over the past five years, a projected 12.6 percent over the next five). The growth areas within energy -- renewables and the energy demands of data centers -- are real but not yet large enough to offset legacy declines. Energy is the single largest driver of the state's weak overall tech job growth ranking, and it deserves a dedicated strategy rather than being folded into general tech policy.
3. Oklahoma is significantly under-invested in the tools that convert research into companies. The state ranks 35th in R&D funding relative to GSP, 41st in patents per science and engineering worker, and 44th, its weakest infrastructure ranking, in SBIR/STTR funding. Venture capital has grown sixfold since 2016 but remains concentrated in energy and healthcare; IT captured only ten percent of 2025 VC funding. These are not awareness problems. They are the direct result of limited state tools (R&D tax credits, matching grants, streamlined tech transfer) that stakeholders across the interviews identified as missing or under-resourced.
4. K-12 education is the constraint stakeholders return to most often, and it shows up in the data. Oklahoma ranks 40th in STEM degree growth, driven by declining engineering completions even as computer science completions rise. Stakeholders describe the state's education and training pipeline, from K-12 through higher education, as fragmented and unresponsive to business and workforce needs. The CareerTech system is the standout

exception. Closing this gap is a multi-year commitment, but it is the precondition for nearly every other takeaway in this list.

5. Oklahoma competes on cost, not yet on opportunity, and that ceiling is real. The state's affordability (8th lowest cost of living, among the lowest housing-burden rates in the country) is a genuine advantage for attracting cost-conscious workers and employers. But stakeholders were direct that "cheap" is not a positioning that wins high-skill tech talent or investment, and the data supports them: Oklahoma still lags on the depth of career opportunities and higher-tier compensation that experienced tech talent weighs most heavily. Affordability should be framed as one input to quality of life and business cost, not the headline pitch.
6. The AI transition is already reshaping the workforce Oklahoma needs to plan for. AI-related job postings and wages are rising quickly, but national research also shows early-career employment declining in the most AI-exposed occupations. Computer user support specialists, Oklahoma's single largest tech occupation at 9,900 workers, sits in a category with meaningful AI exposure and thus risk. Oklahoma has time to prepare, but a state that trains for yesterday's tech occupations while the workforce is repricing around AI will fall further behind.
7. There is no shortage of good ideas; there is a shortage of a shared plan. Every peer state highlighted in this report, from Tennessee's Launch TN to Indiana's regional angel grants to North Carolina's coordinated approach to advanced manufacturing, succeeded by picking a lane and committing state-level resources and coordination to it. Stakeholders were consistent that Oklahoma has the underlying assets (affordability, land, energy infrastructure, tribal nation partnerships, a workable business climate) but lacks a unifying vision for where the state competes and wins in tech.

This report was written and researched by Mike Malone, Skylar Casey, and Greg Payne of Economic Leadership LLC between February and September 2026.

APPENDIX

Total Technology Industry 6-digit NAICS Code Breakdown

NAICS	Industry	Super Sub-Category	Sub-Category	Manufacturing or Services
325411	Medicinal and Botanical Manufacturing	Life Sciences Manufacturing	Life Sciences	Manufacturing
325412	Pharmaceutical Preparation Manufacturing	Life Sciences Manufacturing	Life Sciences	Manufacturing
325413	In-Vitro Diagnostic Substance Manufacturing	Life Sciences Manufacturing	Life Sciences	Manufacturing
325414	Biological Product (except Diagnostic) Manufacturing	Life Sciences Manufacturing	Life Sciences	Manufacturing
334510	Electromedical and Electrotherapeutic Apparatus Manufacturing	Life Sciences Manufacturing	Life Sciences	Manufacturing
334516	Analytical Laboratory Instrument Manufacturing	Life Sciences Manufacturing	Life Sciences	Manufacturing
334517	Irradiation Apparatus Manufacturing	Life Sciences Manufacturing	Life Sciences	Manufacturing
339112	Surgical and Medical Instrument Manufacturing	Life Sciences Manufacturing	Life Sciences	Manufacturing
339113	Surgical Appliance and Supplies Manufacturing	Life Sciences Manufacturing	Life Sciences	Manufacturing
339114	Dental Equipment and Supplies Manufacturing	Life Sciences Manufacturing	Life Sciences	Manufacturing
541330	Engineering Services	Engineering, Environmental, & Clean Tech	Life Sciences	Services
541380	Testing Laboratories	R&D and Testing	Life Sciences	Services
541690	Other Scientific and Technical Consulting Services	R&D and Testing	Life Sciences	Services
541713	Research and Development in Nanotechnology	R&D and Testing	Life Sciences	Services
541714	Research and Development in Biotechnology (except Nanobiotechnology)	R&D and Testing	Life Sciences	Services
541715	Research and Development in the Physical, Engineering, and Life Sciences (except Nanotechnology and Biotechnology)	R&D and Testing	Life Sciences	Services
333242	Semiconductor Machinery Manufacturing	Electronics Hardware	IT	Manufacturing
334111	Electronic Computer Manufacturing	Electronics Hardware	IT	Manufacturing
334112	Computer Storage Device Manufacturing	Electronics Hardware	IT	Manufacturing

334118	Computer Terminal and Other Computer Peripheral Equipment Manufacturing	Electronics Hardware	IT	Manufacturing
334210	Telephone Apparatus Manufacturing	Electronics Hardware	IT	Manufacturing
334220	Radio and Television Broadcasting and Wireless Communications Equipment Manufacturing	Electronics Hardware	IT	Manufacturing
334290	Other Communications Equipment Manufacturing	Electronics Hardware	IT	Manufacturing
334310	Audio and Video Equipment Manufacturing	Electronics Hardware	IT	Manufacturing
334412	Bare Printed Circuit Board Manufacturing	Electronics Hardware	IT	Manufacturing
334413	Semiconductor and Related Device Manufacturing	Electronics Hardware	IT	Manufacturing
334416	Capacitor, Resistor, Coil, Transformer, and Other Inductor Manufacturing	Electronics Hardware	IT	Manufacturing
334417	Electronic Connector Manufacturing	Electronics Hardware	IT	Manufacturing
334418	Printed Circuit Assembly (Electronic Assembly) Manufacturing	Electronics Hardware	IT	Manufacturing
334419	Other Electronic Component Manufacturing	Electronics Hardware	IT	Manufacturing
334511	Search, Detection, Navigation, Guidance, Aeronautical, and Nautical System and Instrument Manufacturing	Electronics Hardware	IT	Manufacturing
334519	Other Measuring and Controlling Device Manufacturing	Electronics Hardware	IT	Manufacturing
335921	Fiber Optic Cable Manufacturing	Electronics Hardware	IT	Manufacturing
335999	All Other Miscellaneous Electrical Equipment and Component Manufacturing	Electronics Hardware	IT	Manufacturing
513210	Software Publishers	Software	IT	Services
516210	Media Streaming Distribution Services, Social Networks, and Other Media Networks and Content Providers	Internet, Social Media, & Telecom	IT	Services
517111	Wired Telecommunications Carriers	Internet, Social Media, & Telecom	IT	Services
517112	Wireless Telecommunications Carriers (except Satellite)	Internet, Social Media, & Telecom	IT	Services
517121	Telecommunications Resellers	Internet, Social Media, & Telecom	IT	Services
517410	Satellite Telecommunications	Internet, Social Media, & Telecom	IT	Services
517810	All Other Telecommunications	Internet, Social Media, & Telecom	IT	Services

518210	Data Processing, Hosting, and Related Services	Internet, Social Media, & Telecom	IT	Services
519290	Web Search Portals and All Other Information Services	Internet, Social Media, & Telecom	IT	Services
541511	Custom Computer Programming Services	Software	IT	Services
541512	Computer Systems Design Services	Software	IT	Services
541513	Computer Facilities Management Services	Software	IT	Services
541519	Other Computer Related Services	Software	IT	Services
221310	Water Supply and Irrigation Systems	Engineering, Environmental, & Clean Tech	Environmental Technology	Services
221320	Sewage Treatment Facilities	Remediation and Waste Management	Environmental Technology	Services
221330	Steam and Air-Conditioning Supply	Engineering, Environmental, & Clean Tech	Environmental Technology	Services
334512	Automatic Environmental Control Manufacturing for Residential, Commercial, and Appliance Use	Engineering, Environmental, & Clean Tech	Environmental Technology	Manufacturing
334513	Instruments and Related Products Manufacturing for Measuring, Displaying, and Controlling Industrial Process Variables	Engineering, Environmental, & Clean Tech	Environmental Technology	Manufacturing
334514	Totalizing Fluid Meter and Counting Device Manufacturing	Engineering, Environmental, & Clean Tech	Environmental Technology	Manufacturing
334515	Instrument Manufacturing for Measuring and Testing Electricity and Electrical Signals	Engineering, Environmental, & Clean Tech	Environmental Technology	Manufacturing
335910	Battery Manufacturing	Engineering, Environmental, & Clean Tech	Environmental Technology	Manufacturing
541620	Environmental Consulting Services	Engineering, Environmental, & Clean Tech	Environmental Technology	Services
562111	Solid Waste Collection	Remediation and Waste Management	Environmental Technology	Services
562112	Hazardous Waste Collection	Remediation and Waste Management	Environmental Technology	Services
562119	Other Waste Collection	Remediation and Waste Management	Environmental Technology	Services

562211	Hazardous Waste Treatment and Disposal	Remediation and Waste Management	Environmental Technology	Services
562212	Solid Waste Landfill	Remediation and Waste Management	Environmental Technology	Services
562213	Solid Waste Combustors and Incinerators	Remediation and Waste Management	Environmental Technology	Services
562219	Other Nonhazardous Waste Treatment and Disposal	Remediation and Waste Management	Environmental Technology	Services
562910	Remediation Services	Remediation and Waste Management	Environmental Technology	Services
562920	Materials Recovery Facilities	Remediation and Waste Management	Environmental Technology	Services
562991	Septic Tank and Related Services	Remediation and Waste Management	Environmental Technology	Services
562998	All Other Miscellaneous Waste Management Services	Remediation and Waste Management	Environmental Technology	Services
211120	Crude Petroleum Extraction	Other Energy and Power Generation	Energy Technology	Services
211130	Natural Gas Extraction	Other Energy and Power Generation	Energy Technology	Services
212112	Underground Coal Mining	Other Energy and Power Generation	Energy Technology	Services
212114	Surface Coal Mining	Other Energy and Power Generation	Energy Technology	Services
213111	Drilling Oil and Gas Wells	Other Energy and Power Generation	Energy Technology	Services
213112	Support Activities for Oil and Gas Operations	Other Energy and Power Generation	Energy Technology	Services
213113	Support Activities for Coal Mining	Other Energy and Power Generation	Energy Technology	Services
221111	Hydroelectric Power Generation	Other Energy and Power Generation	Energy Technology	Services
221112	Fossil Fuel Electric Power Generation	Other Energy and Power Generation	Energy Technology	Services
221113	Nuclear Electric Power Generation	Other Energy and Power Generation	Energy Technology	Services
221114	Solar Electric Power Generation	Renewable Energy	Energy Technology	Services
221115	Wind Electric Power Generation	Renewable Energy	Energy Technology	Services
221116	Geothermal Electric Power Generation	Renewable Energy	Energy Technology	Services

221117	Biomass Electric Power Generation	Renewable Energy	Energy Technology	Services
221118	Other Electric Power Generation	Renewable Energy	Energy Technology	Services
221121	Electric Bulk Power Transmission and Control	Other Energy and Power Generation	Energy Technology	Services
221122	Electric Power Distribution	Other Energy and Power Generation	Energy Technology	Services
221210	Natural Gas Distribution	Other Energy and Power Generation	Energy Technology	Services
324110	Petroleum Refineries	Other Energy and Power Generation	Energy Technology	Services

Tech Occupations SOC Code Breakdown

SOC Code	Occupation Description
11-3021	Computer and Information Systems Managers
11-9041	Architectural and Engineering Managers
13-1081	Logisticians
13-1082	Project Management Specialists
13-1111	Management Analysts
13-1141	Compensation, Benefits, and Job Analysis Specialists
13-1161	Market Research Analysts and Marketing Specialists
13-1199	Business Operations Specialists, All Other
13-2031	Budget Analysts
13-2041	Credit Analysts
13-2051	Financial and Investment Analysts
13-2054	Financial Risk Specialists
13-2099	Financial Specialists, All Other
15-1211	Computer Systems Analysts
15-1212	Information Security Analysts
15-1221	Computer and Information Research Scientists
15-1231	Computer Network Support Specialists
15-1232	Computer User Support Specialists
15-1241	Computer Network Architects
15-1242	Database Administrators
15-1243	Database Architects
15-1244	Network and Computer Systems Administrators
15-1251	Computer Programmers
15-1252	Software Developers
15-1253	Software Quality Assurance Analysts and Testers
15-1254	Web Developers
15-1255	Web and Digital Interface Designers
15-1299	Computer Occupations, All Other
15-2011	Actuaries
15-2021	Mathematicians
15-2031	Operations Research Analysts
15-2041	Statisticians
15-2051	Data Scientists
15-2099	Mathematical Science Occupations, All Other
17-1021	Cartographers and Photogrammetrists
17-2011	Aerospace Engineers
17-2021	Agricultural Engineers
17-2031	Bioengineers and Biomedical Engineers
17-2041	Chemical Engineers
17-2051	Civil Engineers
17-2061	Computer Hardware Engineers
17-2071	Electrical Engineers

17-2072	Electronics Engineers, Except Computer
17-2081	Environmental Engineers
17-2111	Health and Safety Engineers, Except Mining Safety Engineers and Inspectors
17-2112	Industrial Engineers
17-2121	Marine Engineers and Naval Architects
17-2131	Materials Engineers
17-2141	Mechanical Engineers
17-2151	Mining and Geological Engineers, Including Mining Safety Engineers
17-2161	Nuclear Engineers
17-2171	Petroleum Engineers
17-2199	Engineers, All Other
17-3021	Aerospace Engineering and Operations Technologists and Technicians
17-3022	Civil Engineering Technologists and Technicians
17-3023	Electrical and Electronic Engineering Technologists and Technicians
17-3024	Electro-Mechanical and Mechatronics Technologists and Technicians
17-3025	Environmental Engineering Technologists and Technicians
17-3026	Industrial Engineering Technologists and Technicians
17-3027	Mechanical Engineering Technologists and Technicians
17-3028	Calibration Technologists and Technicians
17-3029	Engineering Technologists and Technicians, Except Drafters, All Other
17-3031	Surveying and Mapping Technicians
19-1021	Biochemists and Biophysicists
19-1031	Conservation Scientists
19-1042	Medical Scientists, Except Epidemiologists
19-1099	Life Scientists, All Other
19-2021	Atmospheric and Space Scientists
19-2031	Chemists
19-2032	Materials Scientists
19-2041	Environmental Scientists and Specialists, Including Health
19-2042	Geoscientists, Except Hydrologists and Geographers
19-2043	Hydrologists
19-2099	Physical Scientists, All Other
19-4012	Agricultural Technicians
19-4013	Food Science Technicians
19-4021	Biological Technicians
19-4031	Chemical Technicians
19-4042	Environmental Science and Protection Technicians, Including Health
19-4043	Geological Technicians, Except Hydrologic Technicians
19-4044	Hydrologic Technicians
19-4051	Nuclear Technicians
43-9111	Statistical Assistants
49-2011	Computer, Automated Teller, and Office Machine Repairers
51-9141	Semiconductor Processing Technicians

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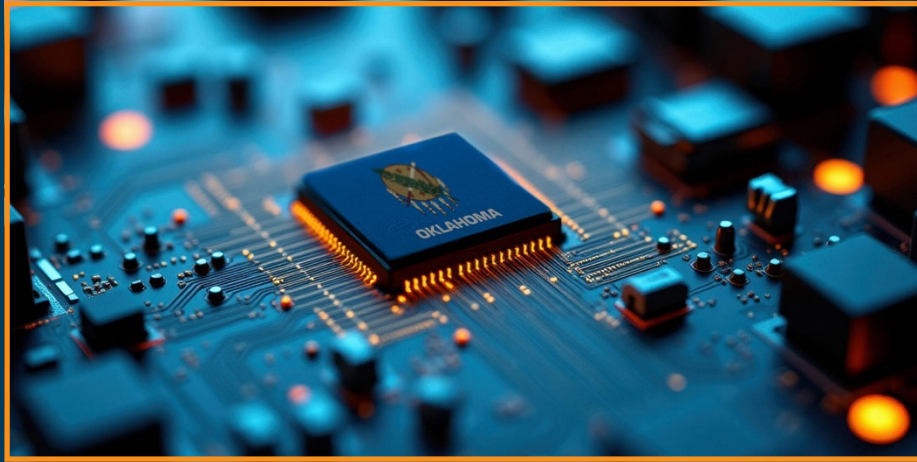
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