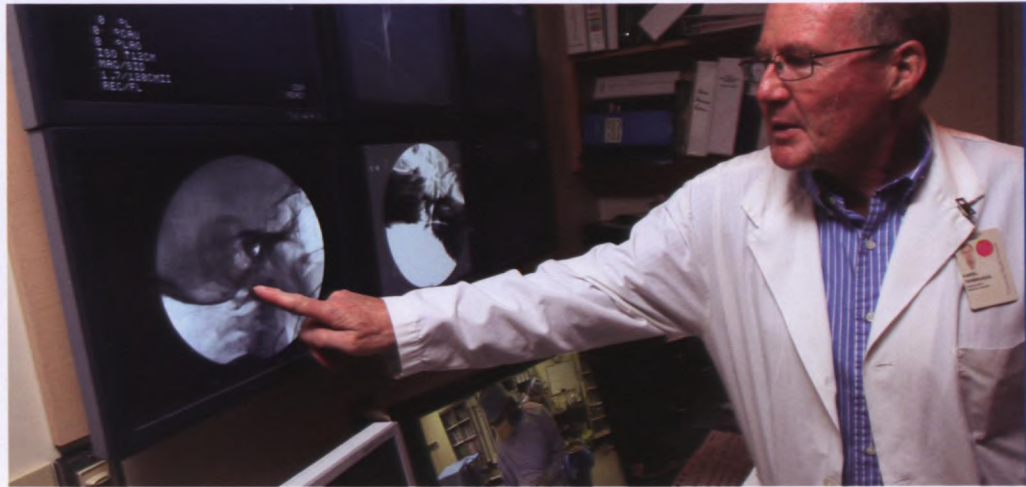


Canadian companies are world leaders in medical imaging, analysis and software development. Winnipeg-based IMRIS Inc. and Calgary-based Imaging Dynamics Company, for example, are worldwide leaders in magnetic resonance and digital radiography imaging systems, and related software products. These hardware and software products are used widely by healthcare providers around the world.



These include **Agfa HealthCare Inc.**, **Canon Inc.**, **GE Healthcare**, **IBM**, **Kodak Health Imaging**, **McKesson Corp.**, **Microsoft**, **Philips Healthcare**, and **Siemens AG**. These investors have been attracted not only by the size of the Canadian health IT market, but also by the strong capabilities of Canadian firms in this sector. The Top 10 Canadian health IT companies generated over \$7 billion in revenues globally in 2009 and include global leaders in digital imaging technology, electronic data capture and use, and wireless/ communications technologies applied to remote monitoring and telehealth solutions.

In 2010, **Agfa HealthCare Inc.** announced the construction of a new global research and development facility at the University of Waterloo in Ontario. This new facility will support its next generation of enterprise-wide healthcare solutions. This is in addition to the \$200-million investment announced in 2009, for expanding its existing operations in Waterloo.

In 2009, Germany's **InterComponentWare AG (ICW)** opened a Toronto office to aid Canadian organizations in extending their information systems and creating a secure patient health record profile based on aggregate data. ICW delivers interoperable

e-health infrastructure and end-user applications for health professionals and their patients.

E-security

Technology security is another area where Canada excels. Particular strengths include developing software for countering computer viruses, cryptography, encryption, mobile authentication, and intrusion detection.

With high consumer use of Internet banking, Canada has become a leading adopter of technologies that make e-security a priority. In 2008, the World Economic Forum ranked Canada fifth in the world for the number of Secure Internet Servers per capita.⁵ Indeed, security software is the fastest growing software market in Canada.

Attracted by Canada's e-security market, world-leading companies such as **CA Inc.**, **Cisco Systems Inc.**, and **Symantec Corporation** have set up operations here. California-based **McAfee Inc.**, a leading provider of computer intrusion prevention solutions, had previously expanded its consumer product software R&D facility in Waterloo from 5,000 to 13,000 square feet.

KEY VALUE-CHAIN STRENGTHS

- Software design
- Research and development
- Data processing
- Software publishers
- Software support

KEY SEGMENT STRENGTHS

- **Enterprise applications:**
CRM, ERP, digital content creation, data mining, project and portfolio management
- **Health IT:**
Biometrics, digital imaging, electronic data capture
- **E-security:**
Countering computer viruses, cryptography, encryption, mobile authentication and intrusion detection
- **Web solutions**

¹ Industry Canada. <<http://www.ic.gc.ca/eic/site/ict-tic.nsf/eng/rt05817.html>>. Downloaded March 25, 2010.

² Software magazine. *The Software 500 Feature*. October 2009.

³ Industry Canada. <<http://www.ic.gc.ca/eic/site/ict-tic.nsf/eng/rt05817.html>>. Downloaded March 25, 2010.

⁴ Gartner, Inc. *Forecast Analysis: Enterprise Application Software, Worldwide, 2008-2013. 3Q09 Update*.

⁵ World Economic Forum. <<http://www.insead.edu/v1/gitr/wef/main/analysis/showdatatable.cfm?mo=3.2>>. Downloaded March 22, 2010.