

Enterprise Application Software



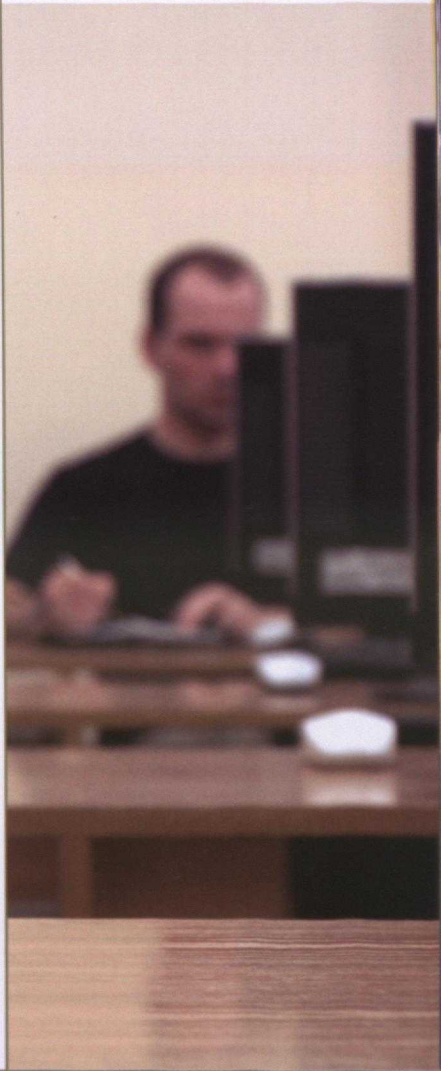
Enterprise Application Software (EAS) is a \$30-billion-plus global industry. The Gartner Group forecasts that with 10 percent annual growth, the EAS market should reach \$43 billion by 2011.²⁸ Canada is not only an important market for EAS applications, it is also an important hub for software engineering and development with many of the world's leading EAS service providers and systems integrators located in Canada.

Canadian firms and global subsidiaries have already established themselves as solutions providers in a broad range of EAS applications including accounting, operations management, enterprise resource planning, customer relationship management (CRM), supply chain management (SCM), electronic commerce, and business intelligence software. Canadian expertise is also evident in both enterprise content and business process management.

Canada is a centre of EAS activity

Canadian firms have achieved global prominence in the EAS field, including Cognos (recently acquired by IBM), which has a significant presence in the business intelligence market, and Open Text, which has established a leadership position in the enterprise content management space. Numerous global vendors and systems integrators have also made significant investment in their Canadian development operations, including industry giants such as IBM, SAP, Sage, Adobe, Oracle, Microsoft, and Sun Microsystems.

Canada also boasts a number of EAS growth firms that possess specific market expertise in business applications and software, including: Optimal Payment (payment processing); BrainHunter (human resource management software); Workbrain (enterprise workforce management); 20-20 Technologies (design); Enghouse (enterprise systems); Descartes (SCM); Tecsys (SCM); Medisolution (healthcare); Emergis (financial and healthcare); and Matrikon (SCM).



²⁸ Gartner Dataquest. Forecast: Enterprise Application Software, 2006-2011. October 2007