

CANADIAN
DATA COMMUNICATIONS SERVICES
MARKET REPORT



2012 EDITION

NBI / MICHAEL SONE
ASSOCIATES INC.

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**CANADIAN DATA COMMUNICATIONS SERVICES
MARKET REPORT, 2012 EDITION**

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About This Report

At over 80 pages and examining the period 2010-2014, NBI/Michael Sone Associates' **Canadian Data Communications Services Market Report, 2012 Edition** is the most comprehensive study published to date on the Data Communications Services Market in Canada. This report is the culmination of numerous interviews with industry participants over a period of several months. The report is buttressed by 47 Exhibits with extensive coverage of revenues, market shares and growth forecasts by company and service. It presupposes some telecom familiarity and attempts to ensure clarity by including definitions where necessary. Included within the report are marketing and technical information pertaining to the business of carrying data within and between customers' facilities.

Services based on ATM or X.25 technologies are not included in the company profiles or in the any of the market-wide summary exhibits as these legacy services are either defunct or attracting no new customers, while networks of existing customers are no longer expanding. While this year's report includes Frame Relay revenues, it is expected to be the last report in which we will do so, for the same reasons that ATM and X.25 no longer appear in this report.

Section 1 contains an Executive Summary that presents an overview of the entire Canadian Data Communications Services Market. Section 2 offers a detailed analysis of the industry, discussing technology & market trends and examines size, share and growth of major components including Frame Relay, Private Line, IP-VPN, LAN, DWDM and Network Management Services markets. Section 3 provides comprehensive profiles of 12 significant participants in the Canadian Datacom Market and delves into the areas of

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About This Report Continued

product development, competitive positioning, marketing and sales strategy, technology and future plans. Each profile includes revenue quantification segmented by service. A major challenge in compiling this report was ensuring that the definition used for data revenues remained consistent across all of the companies profiled, most of which have varying service mixes included as part of their reported data revenues. To the extent possible, estimates of company revenues include those from commercial data communications services used to provide connectivity between sites as well as revenues from management of those services and the networks over which they are provided. The report does not include revenues from consumer services, Internet access, hosting, business process outsourcing, professional services or the sale/rental of data communications equipment.

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