

CANADIAN
HOSTED PBX SERVICES
MARKET REPORT



2012 EDITION

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ASSOCIATES INC.

www.nbicanada.com

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About this Report

This NBI/Michael Sone Associates report initiates our coverage of the Canadian market for hosted PBX (HPBX) services by examining the current state, size and composition of the market. In a hosted environment, such services provide organizations with many of the basic functions of a Private Branch eXchange (PBX) product such as accepting in-bound telephone calls over a main number, switching calls to the correct destination, recording and playing back voice mail messages, placing out-bound calls from employee telephone stations and administrating the system from a central location.

We anticipate that there are multiple audiences for this report, including:

- ◆ Service providers currently offering, or considering the offering of, hosted PBX services;
- ◆ Networking equipment manufacturers offering application servers;
- ◆ Networking equipment manufacturers offering business telephone systems including key systems, PBXs, and IP-PBXs;
- ◆ Interconnects that sell, install and service business telephone systems and associated network services; and,
- ◆ New entrants focused on Internet, data and VoIP services such as cablecos, ISPs, ITSPs and VoIP service providers.

This report is organized into three sections.

Section 1, "*Introduction & Industry Background*", presents an introduction to hosted PBX services, industry background, the competitive landscape, types of HPBX services, and the business rationale. Section 2, "*Canadian Market Overview*", shows the state of the market as of the second quarter of 2012, along with size and share analysis for a three-year period (2011-2013) based on revenues and seats. A comprehensive discussion of market trends is included. Section 3, "*Service Provider Profiles*", presents descriptions of the leading providers of hosted PBX services and their offerings in Canada.