

*CANADIAN
BUSINESS NETWORK SERVICES
MARKET REPORT*



2022 EDITION

NBI / MICHAEL SONE
ASSOCIATES INC.

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**CANADIAN BUSINESS NETWORK SERVICES
MARKET REPORT 2022 EDITION**

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About This Report

Examining the period of 2021-2024, NBI/Michael Sone Associates' **Canadian Business Network Services Market Report, 2022 Edition** (formerly, Canadian Data Communications Services Market Report) marks a major shift in our coverage of the Business Network Services Market in Canada to increase its relevance to the report's loyal readership. We have ceased covering legacy services such as Private Line, DWDM and Network Management Services, and are focusing on the services with the largest existing customer bases as well as those on the leading edge (see below).

At over 60 pages and including 34 Exhibits, the report provides extensive coverage and analysis of revenues, market shares, and growth forecasts by company and service. This report is the culmination of numerous interviews with industry participants over a period of several months.

Section 1 presents a qualitative and quantitative examination of the Canadian Business Network Services Market with a size and growth snapshot of our highlighted segments including SD-WAN, IP-VPN, Ethernet and Dedicated Internet Access (DIA). The Market Analysis section provides a detailed discussion of the industry with elaboration on service offerings and technology trends. We have also included an expanded section on the state of the industry today, focusing on the interplay between SD-WAN on the one hand, and Ethernet, DIA and IP-MPLS on the other, as well as a section discussing future trends in the industry.

Section 2 provides comprehensive profiles of 10 significant data communications service providers and explores areas such as product/service development, competitive positioning, business strategy, technology, and prospective initiatives. Each profile includes a qualitative and quantitative review delineated by segment.

A major challenge in compiling this report is ensuring that the definition used for data revenues remained consistent across all the profiled companies, 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, hosting, business process outsourcing, professional services, or the sale/rental of data communications equipment.