

CANADIAN
DATA COMMUNICATIONS SERVICES
MARKET REPORT



2013 EDITION

NBI / MICHAEL SONE
ASSOCIATES INC.

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**CANADIAN DATA COMMUNICATIONS SERVICES
MARKET REPORT, 2013 EDITION**

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About This Report

Examining the period 2011-2015, NBI/Michael Sone Associates' **Canadian Data Communications Services Market Report, 2013 Edition** continues the tradition as the most comprehensive study published on the Data Communications Services Market in Canada. Buttressed by 45 Exhibits with extensive coverage 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 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 Private Line, IP-VPN, LAN, DWDM and Network Management Services markets. (Services based on ATM or X.25, and for the first time this year, Frame Relay, 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.) Section 3 provides comprehensive profiles of 12 significant participants in the Canadian Datacom Market and delves into the areas of 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

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About This Report, continued

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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