



2012 Edition of the Branham300

Media Kit

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Press Release

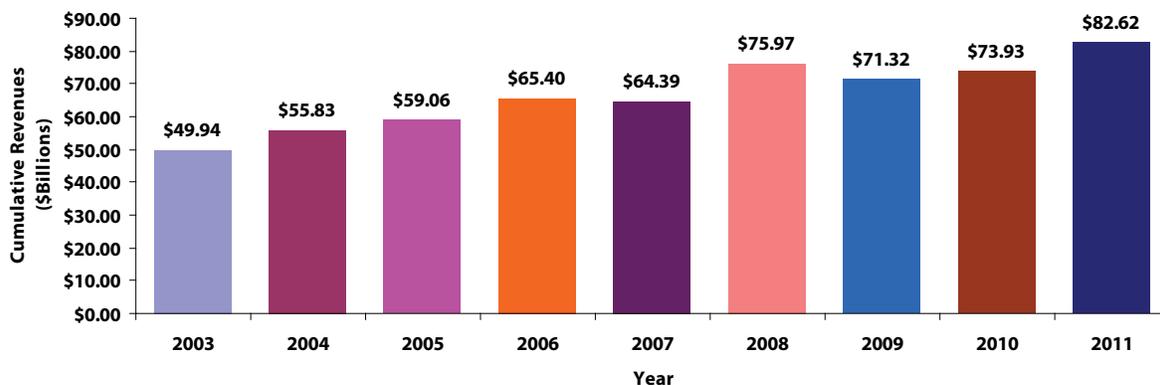
2012 Edition of the Branham300: Canada's Definitive Ranking of ICT Leaders

Canada's ICT Industry got back on track in 2011, posting 11.75% growth to set a new Branham300 revenue record

Ottawa, Ontario, April 24, 2012 - Branham Group, a leading global Information, Communication, and Entertainment (ICE) Technology analyst and strategic marketing company, is pleased to announce the results from the 2012 Edition of the Branham300, the definitive listing of Canada's Information and Communication Technology (ICT) industry leaders, as ranked by revenues. Canada's ICT industry got back on track in 2011, as cumulative revenues for the Top 250 Canadian ICT companies combined to set a new Branham300 revenue record in 2011, increasing sales by 11.75% to \$82.62B, surpassing the high of \$75.97B achieved in 2008.

"With the lingering effects of the economic downturn all but gone in 2011, the Canadian ICT industry generated impressive growth over the past year in order to set a new Branham300 revenue record," said Wayne Gudbranson, President and CEO of Branham Group. "Canada's largest tech players as well as companies within the SMB segment closed strong fiscal 2011 campaigns, an indication that companies of all sizes experienced the market rebound. Looking forward, Branham expects the industry to build on its 2011 performance and post strong single-digit growth in 2012."

**Top 250 Canadian ICT Companies: Cumulative Revenues
(2003 - 2011)**



Growth Across all Four Core Industry Sectors

The ICT Hardware and Infrastructure space in Canada realized the sharpest rise in revenues over the past year, relative to each of the other industry sectors, as cumulative revenues increased 20.55% from \$29.12B in 2010 to \$35.10B in 2011. The xSP sector realized more modest gains, with sector revenues rising 5.91% to \$31.65B, compared to \$29.89B in 2010. The Software and ICT Professional Services sectors combined to account for 66.80% of the companies listed on the Top 250 in 2011. Despite this significant share, the two sectors only account for 19.20% of the listings total revenues, with the Software sector boosting sales by 16.92% to slightly less than \$5B and the ICT Professional Services sector producing \$10.87B in sales in 2011, up 2.02% compared to 2010.

ICT Industry Sectors	2011 Revenues (\$000)	2010 Revenues (\$000)	% +/-	% Top 250 Revenues
ICT Hardware and Infrastructure	\$35,103,994	\$29,119,420	20.55%	42.49%
xSP	\$31,652,514	\$29,886,594	5.91%	38.31%
ICT Professional Services	\$10,868,605	\$10,653,640	2.02%	13.15%
Software	\$4,997,849	\$4,274,673	16.92%	6.05%

ICT is Booming across all of Canada's Tech-Driven Provinces

The geographic composition of Canada's Top 250 ICT companies remained fairly static in 2011, with 94.80% of companies being headquartered in Ontario, Quebec, B.C. or Alberta. These provinces also generated 97.86% of the Top 250's total revenues. The ICT industry in Ontario saw the largest increase in revenues in 2011, rising 16.30% from \$41.10B to \$47.80B. Each of the other major technology regions in Canada generated similar growth rates in 2011, with cumulative revenues for companies headquartered in Quebec, B.C., and Alberta rising between 7-8% compared to 2010. Despite the lack of representation of some of Canada's other provinces and regions on this year's Branham300, some of the country's most creative and leading-edge companies are located in places like Fredericton, Halifax and Winnipeg, a testament that Canadian ICT companies do not have to be at the epicentre of the ICT industry to be considered at the forefront of tech innovation.

Province	2011 Revenues (\$000)	2010 Revenues (\$000)	% +/-	% Top 250 Revenues
Ontario	\$47,804,839	\$41,104,312	16.30%	57.86%
Quebec	\$17,999,935	\$16,772,014	7.32%	21.79%
B.C.	\$10,605,651	\$9,869,396	7.46%	12.84%
Alberta	\$4,444,246	\$4,116,004	7.97%	5.38%

The Canadian ICT industry turned the corner in 2011 and left the memories of the economic downturn in the dust. Growth can be found throughout this year's Branham300, with companies ranging in size from \$5-\$10M all the way to \$1B+ experiencing improved market conditions compared to previous years. While Canada's top technology player, RIM, must overcome some of its major challenges in 2012, the rest of the ICT contingent in Canada possesses the talent and level of innovation to drive the technology space forward for years to come.

Further details on the 2012 Edition of the Branham300 can be found online at www.branham300.com and in the April/May issue of Backbone Magazine (www.backbonemag.com), which is distributed nationally with the Globe and Mail.

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About the Branham300

For nearly 20 years, the Branham300 has highlighted the top Canadian and Multinational ICT companies operating in Canada, as ranked by revenues. It illustrates the depth and breadth of innovative technologies developed in Canada and is widely considered to be a leading source of intelligence on Canada's ICT industry. The Branham300 list consists of the following major categories:

- » Top 250 Canadian ICT Companies
- » The Next 50 Canadian ICT Companies
- » Top 25 ICT Multinational Companies operating in Canada
- » Top 25 Up and Comer ICT Companies (category ranked on innovation/not revenue)

The Branham300 is published annually in the April issue of Backbone Magazine (www.backbonemag.com), as well as on the Branham300 website, www.branham300.com. Keep up to date with the Branham300 and Branham Group on twitter at @branhamgroup.

About Branham Group Inc.

Branham Group Inc. is a leading industry analyst and strategic consulting company servicing the global information, communication, and entertainment (ICE) technology marketplace. Branham Group assists technology companies and related institutions in achieving market success through its custom consulting services (Planning, Marketing and Partnering), and through its multi-client research subscription programs (Digital Health, Green IT and Cloud). Branham also produces an annual listing of the top ICT companies in Canada (www.branham300.com) and monitors over 450 Digital Health vendors (www.branhamgroup.com/digitalhealth).

For more information regarding Branham Group, please visit www.branhamgroup.com.

What is the Branham300?

For nearly 20 years, the Branham300 has highlighted the top Canadian and Multinational ICT companies operating in Canada, as ranked by revenues. It demonstrates the breadth of innovative technology offered by Canadian companies and the contribution these companies make to the economy both nationally and provincially.

As a well respected annual ranking of both publicly traded and privately held companies, the Branham300 receives tremendous attention with comprehensive details on its website (www.branham300.com) and through its publication in the April issue of Backbone Magazine (www.backbonemag.com), which is distributed with the Globe and Mail. Recognition on the Branham300 listing has provided many up and coming firms with increased market exposure and brand awareness, while in many cases also opening the door to new business opportunities, both domestically and abroad.

The Branham300 list consists of the following major categories, ranked by revenue (except where noted):

- » Top 250 Canadian ICT Companies
- » The Next 50 Canadian ICT Companies
- » Top 25 ICT Multinational Companies operating in Canada
- » Top 25 Up and Comer ICT Companies (category ranked on innovation and promise, not revenue)

Other sub listings that are generated from the Top 250 listing include:

- » Top 25 Canadian Software Companies
- » Top 25 Canadian ICT Professional Services Companies
- » Top 25 Canadian ICT Hardware and Infrastructure Companies
- » Top 10 Canadian xService Providers (xSP) - (includes ASP, ISP, Wireless SP, MSP, etc.)
- » Top 10 Canadian ICT Security Companies
- » Top 10 Canadian Wireless Solutions Companies
- » Top 5 Pure-Play Canadian Healthcare ICT Companies
- » Top 5 Mixed-Play Canadian Healthcare ICT Companies
- » Top 10 ICT Staffing Companies
- » Top 5 SaaS Companies
- » Top 5 Mobile Technologies Companies
- » Top 20 Movers and Shakers
- » Top 10 Growth Companies



Branham300 Criteria

Companies must meet the following criteria to be considered a Canadian company for purposes of applying for any of the categories of the Branham300 other than the Multinational listing:

- » The company was founded in Canada and its headquarters remain in Canada
- » Corporate direction is determined in Canada
- » The company must fall under one of the four major Branham300 categories

Criteria for Major Categories:

Category	Criteria	Types of Revenue
Canadian Software Company	Companies whose positioning and strategic direction suggests their core competency is the sale of proprietary software applications developed through the company's own research and development activities.	Includes, but is not limited to, revenue generated from: licensing fees, maintenance, support and training fees related to their software products.
Canadian ICT Professional Services Company	Companies whose positioning and strategic direction suggests their core competency is the provision of ICT professional services.	Includes, but is not limited to, revenue generated from: systems advice and technical consulting, systems integration, contract systems analysis and programming, applications management and customized development, project or facilities management, training and education, testing of applications, value-added reselling, ICT staffing, and strategic planning regarding ICT implementation.
Canadian x Service Provider Company	Companies whose positioning and strategic direction suggests their core competency is: <ul style="list-style-type: none"> » Wireless voice or data transmission services (WSP) » Providing access to the Internet (ISP) » The development and deployment of applications and/or hosting of third party software applications (ASP) 	Includes, but is not limited to, revenue generated from: wireless voice and data transmission, subscription fees, licensing fees, maintenance, support and training.
Canadian ICT Hardware and Infrastructure Company	Companies whose positioning and strategic direction suggests their core competency is the sale of proprietary hardware and/or infrastructure components or systems that were developed through the company's own research and development activities.	Includes, but is not limited to, revenue generated from: PCs, servers, networking, and communications components. Excludes Distributors.

Criteria for Sub Categories:

Category	Criteria	Types of Revenue
Canadian ICT Security Company	Companies whose positioning and strategic direction suggests their core competency lies in the development and/or provision of ICT Security solutions and services.	Includes, but is not limited to, revenue generated from: licensing fees, maintenance, support and training fees related to the security products as well as services including but not limited to: systems advice and technical consulting, contract systems analysis and programming, and strategic planning regarding ICT security implementations.
Canadian Healthcare ICT Company	Companies whose positioning and strategic direction suggests their core competency lies in the development and/or provision of solutions or services specifically for the healthcare market.	Includes, but is not limited to, revenue generated from: licensing fees, maintenance, support and training fees related to the healthcare products as well as services including but not limited to: systems advice and technical consulting, contract systems analysis and programming, and strategic planning regarding ICT healthcare implementations.
Canadian Wireless Solution Provider Company	Companies whose positioning and strategic direction suggests their core competency is the development and/or provision of wireless solutions.	Includes, but is not limited to, revenue generated from: licensing fees, maintenance, support and training fees related to the wireless products; as well as systems advice and technical consulting, contract systems analysis and programming, and strategic planning regarding wireless solutions implementations.
Canadian ICT Staffing Company	Companies whose positioning and strategic direction suggests their core competency is the provision of ICT staffing services.	Includes, but is not limited to, revenue generated from: contract and permanent ICT staffing placements, and related services.
Canadian Mobile Technology Company	Companies whose positioning and strategic direction suggest their core competency lies in the development and/or provision of mobile solutions and services.	Includes, but is not limited to, revenue generated from: licensing fees, maintenance, support and training fees related to the mobile technologies; as well as systems advice and technical consulting, contract systems analysis and programming, and strategic planning regarding mobile technologies.
Canadian SaaS Companies	Companies whose positioning and strategic direction suggest their core competency lies in the development and/or provision of SaaS solutions and services.	Includes, but is not limited to, revenue generated from: licensing fees, maintenance, support and training fees related to the SaaS technologies; as well as systems advice and technical consulting, contract systems analysis and programming, and strategic planning regarding SaaS technologies.
Canadian Up & Comers ICT Company	Companies that were incorporated after December 31, 2007 and show great promise within the Canada ICT industry. Selections are based on creativity and innovation whether in a new technology area or optimizing existing technology in an innovative manner.	The Up & Comers listing is not based on revenues, but companies must satisfy the requirements for one of the four major categories (Software, ICT Professional Services, x Service Provider, or ICT Hardware and Infrastructure).
ICT Multinational Company	ICT Companies that are foreign owned and headquartered outside of Canada, but maintain significant presence and offices within Canada.	Revenue figures are comprised of domestic revenue and/or export revenue generated by the Canadian entity.

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About Branham Group Inc.

Branham Group Inc. (www.branhamgroup.com) is a leading industry analyst and strategic marketing consultancy, exclusively focused on the technology sector. Headquartered in Ottawa, Canada and with over twenty years of assisting global customers, Branham possesses a clear understanding of the major players and the market issues facing the technology industry. Branham conducts consulting work in the United States, Europe, Canada, Latin America, and Asia, providing the firm with a global market perspective. With a focus on creating value and roadmaps to success for the 'Who's Who' in the industry and 'Up and Coming' companies, the company seeks to deliver market success to its customers.

Custom Consulting Branham

Branham's IT consultancy services specialize in three critical areas to assist a company in improving its business performance:

- » Planning
- » Marketing
- » Partnering

Consideration of these core areas is fundamental to the effective planning and implementation of any company's go-to-market activities. For more information, please contact Andrew Bisson at (613) 745-2282, ext. 117 (abisson@branhamgroup.com).

With a keen interest in global markets and opportunities for Canadian ICT companies, Branham broadened its customized consulting heritage to deliver comprehensive multi-client research reports in the last few years. Examples of research projects on the ICT industry include Digital Health and Green IT.

Digital Health Branham

The Digital Health Practice within Branham Group offers a range of unparalleled data products and consulting services. The Digital Health NOW Subscription Package is Branham's flagship Digital Health information and analysis product. The primary objective of this package is to provide in-depth analysis on the current state of healthcare ICT deployment in Canadian healthcare organizations. The annual subscription package includes 12 Digital Health NOW Monthly provincial updates, as well as six bi-monthly Digital Health NOW Spotlight reports, which take an in-depth look at specific topics in Digital Health such as the Application of Cloud Technologies in Healthcare and Mobility in Healthcare. For further information, please contact Wayne Gudbranson at (613) 745-2282 ext. 113 (wgudbranson@branhamgroup.com).

Green IT Branham

Branham's Green IT research initiative provides unbiased, in-depth information and analysis of current trends in Green IT in North America and abroad while taking into consideration core developments in select industry verticals. The initiative aims to provide detailed and consistent data sets that are available in other segments of the IT industry but are lacking in the Green IT space. Branham delivers this through a Green IT subscription service that provides information of value to any organization that is tracking the Green IT space, or considering buying or selling Green IT solutions. For more information, please contact Ted Dhillon at (613) 745-2282, ext. 121 (tdhillon@branhamgroup.com).

With a commitment to market research and trend analysis, Branham is dedicated to delivering targeted insight to clients with uncompromising quality. Branham looks to continue this trend in all its efforts and strives to learn more about key developments across the IT sector while also helping to shape them.



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