



2014 Edition of the Branham300

Media Kit

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Press Release

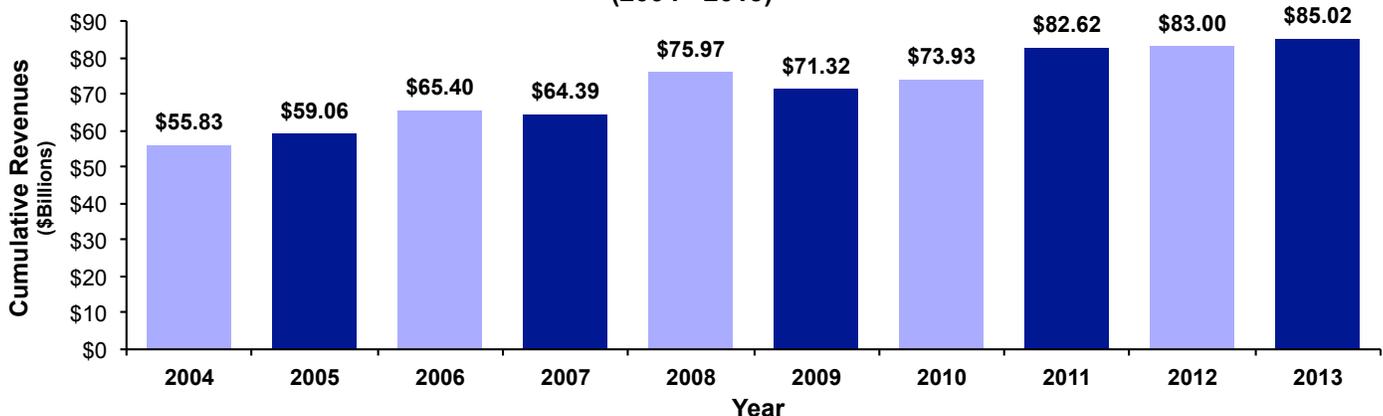
2014 Edition of the Branham300: Canada's Definitive Ranking of ICT Leaders

Canada's ICT Industry sees continued growth in 2013

Ottawa, Ontario, April 22, 2014 - Branham Group Inc., a leading global Information and Communication Technology (ICT) Industry Analyst and Strategic Marketing company, is pleased to announce the results for the 2014 Edition of the Branham300. The Branham300 is the definitive listing of Canada's top publicly traded and privately held Information and Communication Technology (ICT) companies, as ranked by revenues. Canada's ICT industry continued to move forward in 2013, yet again setting another record with cumulative revenues for the Top 250 Canadian ICT companies increasing by 2.4% to \$85B.

"Canada's ICT sector continues to advance, setting new revenue records even despite the significant decreases experienced by Blackberry (-40%), Canada's top technology firm in 2013. Netting out Blackberry's revenue from the past two years and the industry overall performed much better, with an overall growth rate of 13.3%," said Wayne Gudbranson, President and CEO of Branham Group. "Last year the industry was impacted by a number of Canadian tech acquisitions that no longer made the list, and Blackberry accounted for 22.1% of the Top 250's total revenue. This year the company only represented 13.9%. Canadian companies have more than made up for the difference, and Branham expects the industry to continue this growth over the next coming years."

**Top 250 Canadian ICT Companies: Cumulative Revenues
(2004 - 2013)**



Growth Continues Across 3 of 4 Core Industry Sectors

Once again, the ICT Professional Services sector in Canada realized the sharpest rise in revenues over the past year, relative to each of the other industry sectors, as cumulative revenues increased a significant 49.9% from \$12.28B in 2012 to \$18.41B in 2013. The Software sector followed with 20.1% growth, significantly higher than the 0.31% growth experienced in 2012. While the xSP sector experienced 3.8% growth in 2013, this is behind the levels experienced in 2012 (7.93%). Similar to 2012, the ICT Hardware and Infrastructure sector in Canada was the only major ICT sub-sector to experience a decline, dropping 20.3%, close to double the decrease this sector experienced in 2012 (-10.13%). Again, the decline came largely as a result of Canada's top ICT company Blackberry, seeing a 40% decline in revenues for FY2013. As a result of the decline, Canada's ICT Hardware

and Infrastructure sector now falls to the number 2 position, representing 29.56% of Top 250 revenues, as compared to the xSP sector, which sits on top representing 41.70%.

ICT Industry Sectors	2013 Revenues (\$000)	2012 Revenues (\$000)	% +/-	% Top 250 Revenues
xSP	\$35,455,731	\$34,162,086	3.79%	41.70%
ICT Hardware and Infrastructure	\$25,130,896	\$31,546,875	-20.34%	29.56%
ICT Professional Services	\$18,411,138	\$12,279,752	49.93%	21.66%
Software	\$6,018,639	\$5,013,384	20.05%	7.08%

Ontario sees a decline while others experience consistent year over year growth

The geographic composition of Canada's Top 250 ICT companies remained fairly static in 2013, with nearly 96% of companies being headquartered in Ontario, Quebec, B.C. or Alberta. These provinces also generated almost 98% of the Top 250's total revenues. The ICT industry in Ontario continued to see a decrease in overall revenues (attributed to BlackBerry) as compared to the others, dropping 12.10%. Quebec, B.C., and Alberta all had gains in 2013, with the largest coming from Quebec thanks to significant growth attributed to CGI, the new contender for the top spot on the Top 250 listing. 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, Moncton, and Halifax, 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	2013 Revenues (\$000)	2012 Revenues (\$000)	% +/-	% Top 250 Revenues
Ontario	\$40,390,948	\$45,949,529	-12.10%	47.51%
Quebec	\$24,979,325	\$19,119,708	30.65%	29.38%
B.C.	\$12,995,040	\$11,371,543	14.28%	15.29%
Alberta	\$4,942,293	\$4,723,370	4.63%	5.81%

The Canadian ICT industry continued to move forward at a stable pace in 2013 and this is expected to continue well into 2014. 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, BlackBerry, must continue to execute and deliver with its new line of smart phones, the rest of the ICT contingent in Canada possesses the requisite talent and level of innovation needed to drive the technology industry forward for years to come.

Further details on the 2014 Edition of the Branham300 can be found online at www.branham300.com.

For further information, please contact:

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About the Branham300

For 21 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 at www.branham300.com. Keep up to date with the Branham300 and Branham Group on twitter at @branhamgroup, through Branham's Newsletter, or RSS feed.

About Branham Group Inc.

Branham Group Inc. is a leading industry analyst and strategic marketing company servicing the global Information and Communication Technology (ICT) marketplace. Branham Group assists ICT 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 21 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). 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 Canadian ICT Staffing Companies
- » Top 10 Canadian Software as a Service (SaaS) Companies
- » Top 10 Canadian Mobile Technologies Companies
- » Top 5 Canadian Digital Media and Entertainment 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 Each Specific Category:

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.
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 Digital Media and Entertainment Company	Companies whose positioning and strategic direction suggest their core competency lies in the development and/or provision of digital media solutions and services.	Includes, but is not limited to, revenue generated from: licensing fees, maintenance, support and training fees related to digital media products as well as services including but not limited to: systems advice and technical consulting, contract systems analysis and programming, and strategic planning regarding digital media solutions (i.e. game creation, animation, graphics, generating digital content, etc., but excluding groups that specialize in digitization of sound and video).
Canadian Up & Comers ICT Company	Companies that were incorporated after December 31, 2009 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 \(\[abisson@branhamgroup.com\]\(mailto:abisson@branhamgroup.com\)\).](#)

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 quarterly 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 \(\[wgudbranson@branhamgroup.com\]\(mailto:wgudbranson@branhamgroup.com\)\).](#)

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 \(\[tdhillon@branhamgroup.com\]\(mailto:tdhillon@branhamgroup.com\)\).](#)

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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