Canadian Telecom Market Drivers and Strategies

AN IDC CONTINUOUS INTELLIGENCE SERVICE

IDC's *Canadian Telecom Market Drivers and Strategies* service keeps clients abreast of the latest technological and regulatory trends impacting the Canadian telecom market and analyzes the competitive landscape. This groundbreaking service provides telecom service providers and IT vendors with executive-level insights into industry trends, strategic planners with unparalleled detail in sizing critical market segments, and sales and marketing organizations with insights into new market opportunities and tactical advice based on end-user demand-side research. This service includes access to a dedicated analyst team that provides insightful analysis that enables clients to better take advantage of the market segments that offer the greatest potential in an effort to increase revenue and gain a competitive advantage.

Markets Covered

This service covers the following segments of the Canadian telecommunications services market:

- Broadband Internet access, including cable, DSL and fixed wireless, and WiMAX
- IP convergence and next-generation OSS
- Data communications services
- Wireless voice and data, including 3G/4G, WLAN, and wireless enterprise adoption
- Wireline local access and long distance
- Residential, small and medium-sized business, and enterprise markets

Subjects Analyzed

Throughout the year, this service will address the following topics:

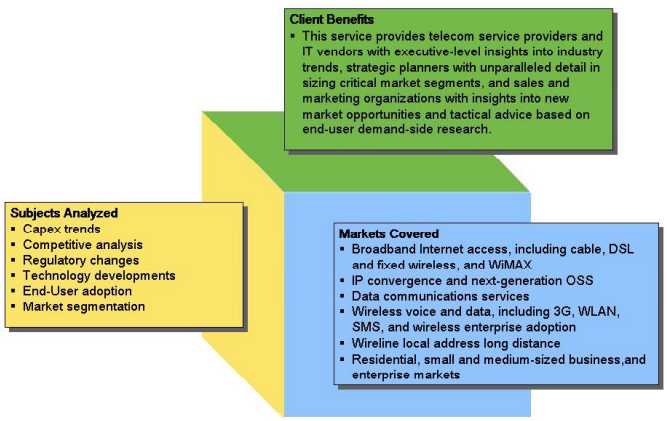
- Capital expenditures by major service providers
- Competitive analysis of incumbents, CLECs, ISPs, wireless carriers, and equipment vendors and their marketing strategies and alliances
- Regulatory developments and changing industry structures
- Technological developments and industrywide issues such as safety and privacy
- End users' adoption of emerging services such as video, wireless data, WiMAX, and mobile applications
- Market segmentation based on consumer and business segments along with usage and preferences

Key Questions Answered

Our research addresses the following issues that are critical to your success:

1. How will the current state of the Canadian telecom market transform the sector's landscape?
2. How should service providers approach each market segment?
3. What key vertical markets should providers and vendors target?
4. How are service providers leveraging IP technology, and what opportunities are emerging from IP convergence?
5. What impact is IP-based and wireless technology having on both network architecture and service delivery?
6. How will the market for wireless services evolve beyond 2008?

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Source: IDC

Competitive Analysis

IDC's *Canadian Telecom Market Drivers and Strategies* service examines how service providers and equipment vendors are positioning themselves to compete in the C$38 billion Canadian telecom services market. This service reviews the strategies, market positioning, and future direction of major providers in the market, as well as vendors selling to telecom providers, including:

Alcatel-Lucent, Atria Networks, Bell Aliant, Bell Canada, Bragg Communications, Cisco, Cogeco, Data & Audio-Visual Enterprises Wireless, Ericsson, Globalive, HP, IBM, MCI, Microsoft, MTS-Allstream, Nokia, Nortel Networks, Primus, RIM, Rogers Communications, SaskTel, Shaw, Siemens, Telus, Vidéotron, and Vonage.

Core Research

This service focuses on the following core research. In addition to the insight provided in this service, IDC may conduct additional research on specific topics, or emerging market segments, via research offerings that require additional IDC funding and client investment.

Canadian Wireless Forecast
This study provides five-year penetration and spending forecasts for the wireless voice and data markets. It also examines providers' shares and strategies, as well as drivers and inhibitors in the fast-growing wireless market.

Canadian Telecom Capex Spending Outlook
This research, which is revisited annually, tracks a key barometer of the health of the telecom sector that has critical implications for other players throughout the IT market.

Small and Medium-Sized Business Telecom Usage and Preferences
Based on our annual survey of Canadian small and medium-sized businesses, this document offers insight into developing trends through comparative analysis with previous studies.

Canadian Telecom Industry Structure Guide
This popular updated guide to the Canadian telecom market includes summaries of industry segments and structures, competitive analysis, and profiles of key industry players. This study is an excellent reference for anyone participating in the market.

Canadian Telecom Forecast and Analysis by Vertical Market
This study presents our comprehensive annual five-year forecast of Canada's major telecom markets, which are also broken down by key vertical segments based on our market segmentation tool.

Smarter Segmentation
Analysis also includes persona- or role-based segmentation on selected roles of individuals within an organization. Personas are archetypes of individuals with similar roles within organizations and are defined based on their needs, usage, and decision-making capabilities around technology products and services.

A Complete Intelligence Solution

IDC offers a complete market intelligence solution customized to meet your business requirements. The array of products and services available to you includes:

- The opportunity to have your specific questions answered through personal interaction with industry experts who cover the topics and markets in your service
- Around-the-clock access to our market intelligence on idc.com, IDC's personalized Web experience
- A view of the market's future with 12 months of continuous intelligence about its direction and the reasons behind it, along with actionable advice for taking advantage of existing and emerging opportunities
- Special client discount pricing on purchases of research from other services
- Complimentary admission to IDC's annual Directions conference, where you'll hear our latest forecasts and network with IDC analysts and other industry professionals
- Complimentary invitations to monthly executive telebriefings, interactive forums designed to provide you with insights about research and strategies directly from IDC analysts

To find out how our flexible packaging options can meet your specific business needs, please contact your IDC sales executive.

IDC's Investment Philosophy

As a privately held company, IDC believes that our customers are our primary constituency. A large percentage of every revenue dollar is reinvested back into our products, including more analysts, more geographic coverage, and extensive primary research.

Our steady growth over the past 10-plus years reflects our commitment to investing in our customers.

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IDC is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications, and consumer technology markets. IDC helps IT professionals, business executives, and the investment community make fact-based decisions on technology purchases and business strategy. More than 1,000 IDC analysts provide global, regional, and local expertise on technology and industry opportunities and trends in over 110 countries worldwide. For more than 43 years, IDC has provided strategic insights to help our clients achieve their key business objectives. IDC is a subsidiary of IDG, the world's leading technology media, research, and events company. You can learn more about IDC by visiting www.idc.com.

IDC Canada, 36 Toronto Street, Suite 300, Toronto, Ontario M5C2C5 Canada, P.416.369.0033 F.416.369.0419

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