



Branham

B R A N H A M G R O U P I N C

ICT INDUSTRY IN CANADA

- Another record year -

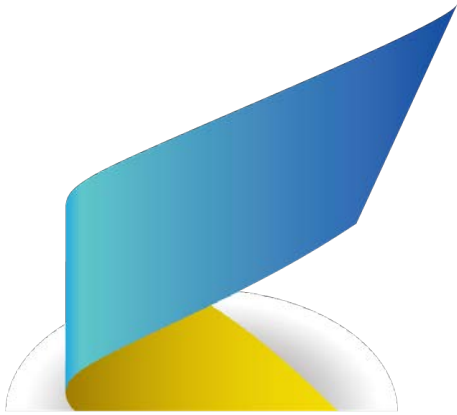


Thank you to:



Branham300 – 2017 edition

Country sponsors



MINISTRY
OF ECONOMIC DEVELOPMENT
AND TRADE OF UKRAINE



CUTIS



Branham300
2017 Edition



Canada's Top
ICT Companies

CANADA
150



Platinum sponsor

softserve



Gold sponsor



Silver sponsors



Academic sponsor



Branham300 – 2017 edition



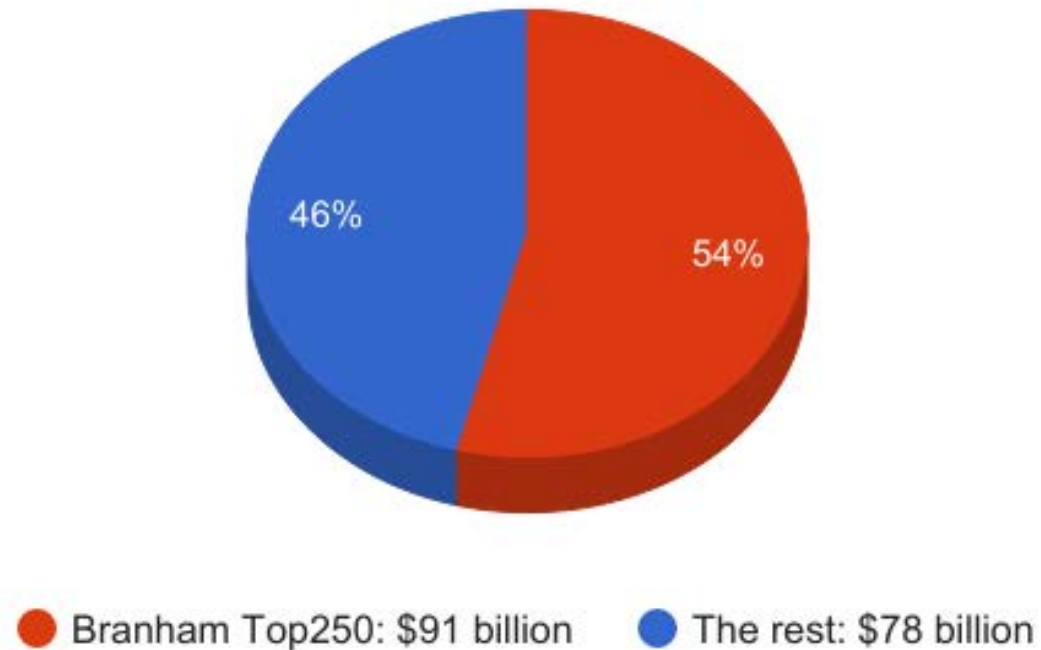
Now in its 24th year, the Branham300 is:

- the longest-running ranking of tech companies in Canada
- Canada's most comprehensive list:
 - Top 250 technology companies
 - Top 25 technology Up and Comers
 - Top 25 technology multinationals operating in Canada
- the only broad list of both publicly traded and privately held tech companies in Canada



The Top 250 companies generate more than half of Canada's ICT revenue

Total revenue generated by the ICT sector in
2014: \$169 billion (StatsCan)



Another record year

This year

\$105.3 billion

in Top 250 revenue

Fiscal year: 2016

Last year

\$96.1 billion

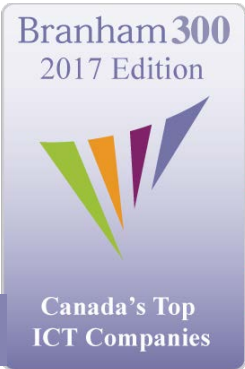
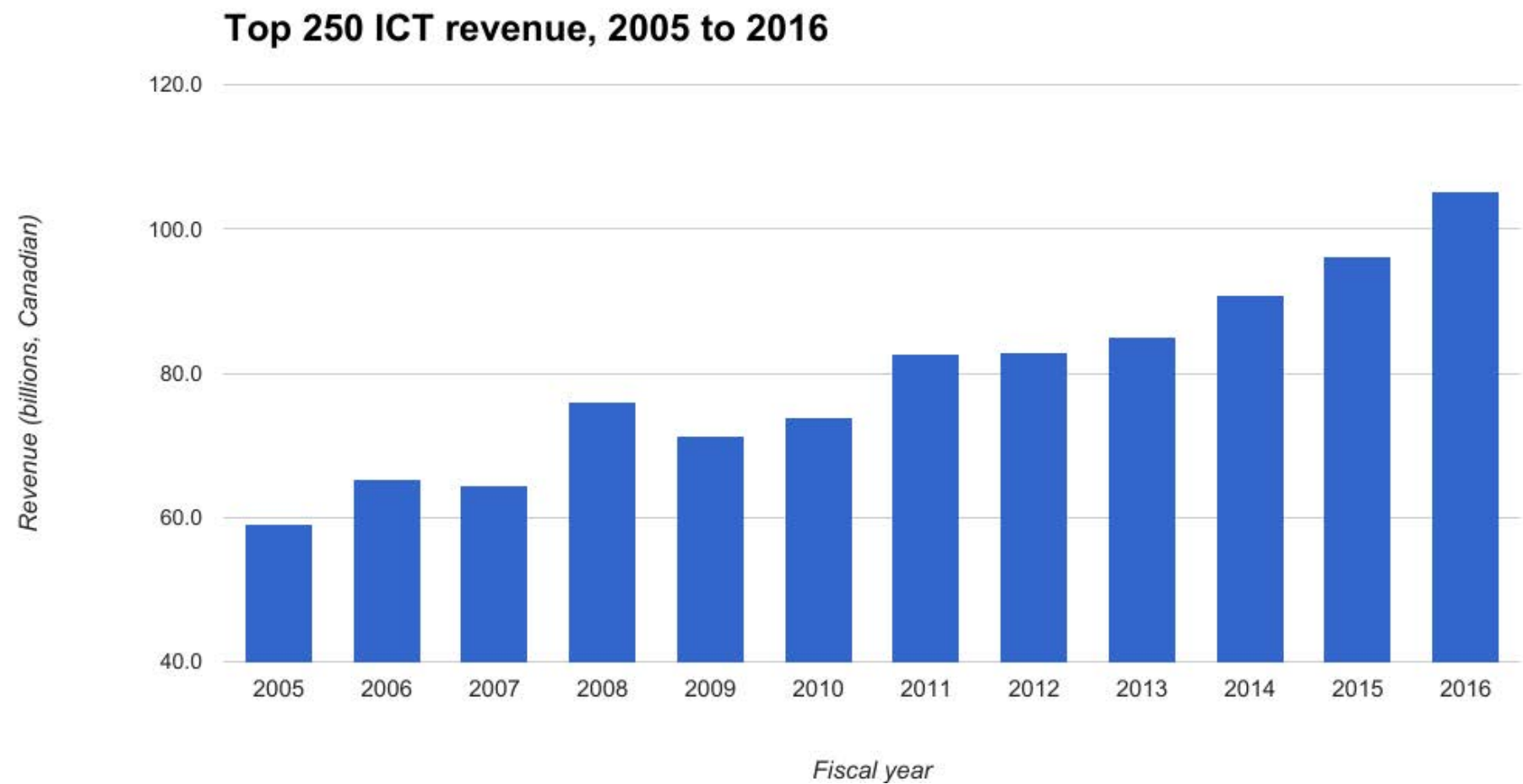
in Top 250 revenue

Fiscal year: 2015

9.6% growth year over year



Year-over-year growth



Why the big increase?

73% of the Top 250 posted revenue growth

55% experienced double-digit growth

18% report in US dollars



Why the big increase?

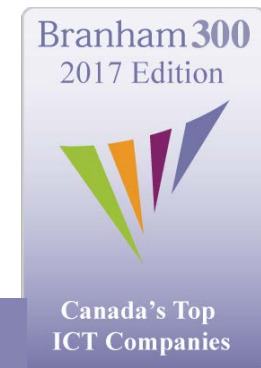
35 of the Top 250 are new to the list this year

New revenue stars

\$1.5 billion Pivot Technology Solutions

\$259 million Goldmoney

\$190 million Tucows



Top 5 revenue

\$15.2 billion **BCE** (excluding media and wireline voice)

\$11.1 billion **TELUS** (excluding wireline voice)

\$10.7 billion **CGI Group**

\$10.1 billion **Rogers Communications** (excluding media and cable TV)

\$7.97 billion **Celestica**



Top 250 companies by province

147 Ontario

41 British Columbia

27 Alberta

26 Quebec

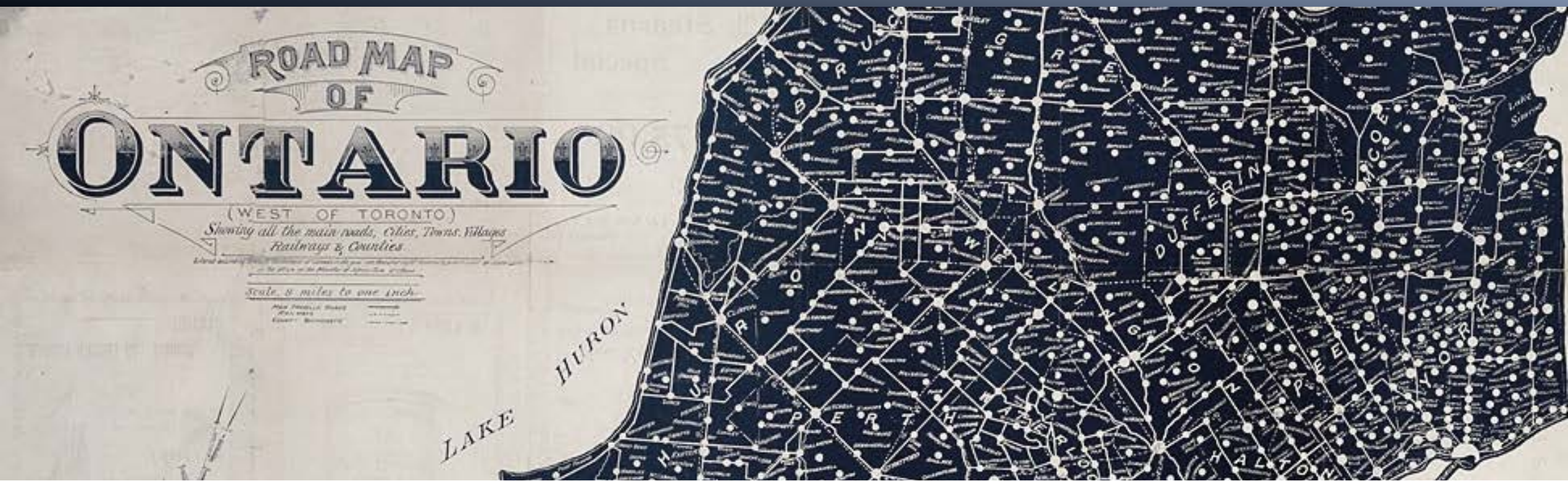
These four provinces represent:

96% of the Top 250 companies

98% of Top 250 revenues



Branham300 – 2017 edition



Ontario

Branham300
2017 Edition



Canada's Top
ICT Companies



Ontario

Fiscal 2016

147 companies

\$46 billion in revenue

44% Top 250 revenue

\$312 million average revenue

Fiscal 2015

144 companies

\$41 billion in revenue

43% Top 250 revenue

\$285 million average revenue



Branham300 – 2017 edition



GTA

Wayne Gudbranson | CEO | Branham Group



Companies and revenue

Fiscal 2016

97 companies

\$34.8 billion in revenue

33% of Top 250 revenue

19% revenue growth

Fiscal 2015

97 companies

\$29.2 billion in revenue

30% of Top 250 revenue

6.6% revenue growth



Top 5 revenue

Fiscal 2016

\$10.1 billion Rogers

\$8 billion Celestica

\$2.8 billion Constellation

\$2 billion Pivot Technology Solutions

\$1.8 billion Softchoice



New and notable: DataWind

89% revenue growth fiscal 2016

74%: Guatemalans with no internet access

One year of access: with Datawind's new tablet

37%: company's share of tablet market in India



New and notable: First Global Data

597% revenue growth fiscal 2016



15 countries: added to distribution network

Opened office in Indonesia

LianLian Pay alliance: fintech solution for Chinese citizens in Canada and US



Branham300 – 2017 edition



Ottawa

Companies and revenue

Fiscal 2016

32 companies

\$4.6 billion in revenue

4% of Top 250 revenue

7% revenue growth

Fiscal 2015

35 companies

\$4.3 billion in revenue

4.5% of Top 250 revenue

30% revenue growth



Top 5 revenue

Fiscal 2016

\$1.6 billion Mitel

\$930.9 million Telesat

\$515.9 million Shopify

\$275 million Calian Group

\$153.7 million Kinaxis



Biggest growth: Shopify

96% revenue growth fiscal 2016

95% revenue growth fiscal 2015

US\$555,000: per-minute peak value of transactions

175 countries: worldwide customer reach

130,000: merchants who use Shopify Mobile



New to the list: ProntoForms

176 debut rank on the Top 250

28% revenue growth fiscal 2016

4,000 customers, 55,000 subscribers

88% recurring revenue



Branham300 – 2017 edition



Greater Kitchener-Waterloo

Companies and revenue

Fiscal 2016

18 companies
\$6.3 billion in revenue
6% of Top 250 revenue
21% revenue decline

Fiscal 2015

17 companies
\$8 billion in revenue
8% of Top 250 revenue
23% revenue decline



Top 5 revenue

Fiscal 2016

\$2.9 billion BlackBerry

\$2.4 billion OpenText

\$254.5 million StarTech

\$245.1 million Descartes Systems Group

\$160 million Sandvine



New and Notable: eSentire

66% revenue growth fiscal 2016

Best Security Solution: award from HFM

Best SME Security Solution: award from SC Media

47%: increase in customer deployment



Mover and Shaker: TextNow

22: rank change compared to last year

72%: revenue growth fiscal 2016

75: doubled headcount in two years

50 million: worldwide users



Branham300 – 2017 edition



Canada



Top 250 companies by province

59% Ontario, last year 61%

16% BC, last year 16%

10% Quebec, last year 10%

11% Alberta, last year 10%

4% other, last year 3%



Top 250 companies by tech hub

39% Greater Toronto, last year 40%

16% Greater Vancouver, last year 16%

13% Greater Ottawa, last year 14%

9% Greater Montreal, last year 8%

6% Greater Kitchener-Waterloo, last year 6%



Top 250 companies by ICT sector

37% Software, last year 38%

36% ICT Professional Services, last year 35%

21% ICT Hardware and Infrastructure, last year 18%

6% x Service Provider, last year 9%



Top 250 companies by ICT sector revenue

16.7% Software, last year 18.3%

22.2% ICT Professional Services, last year 18.3%

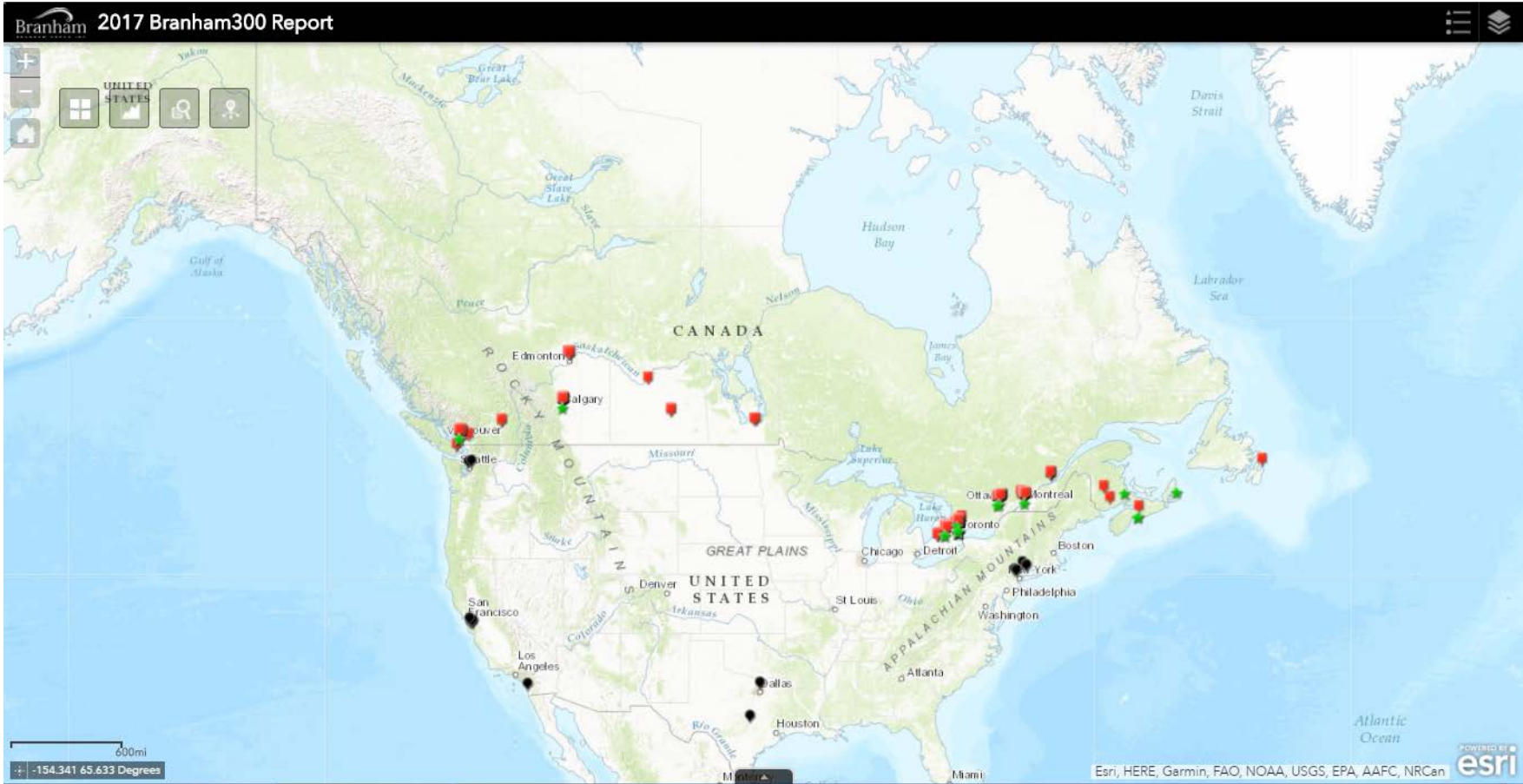
14.8% ICT Hardware and Infrastructure, last year 18%

46.3% x Service Provider, last year 45.4%



Branham300 – 2017 edition

Esri interactive maps



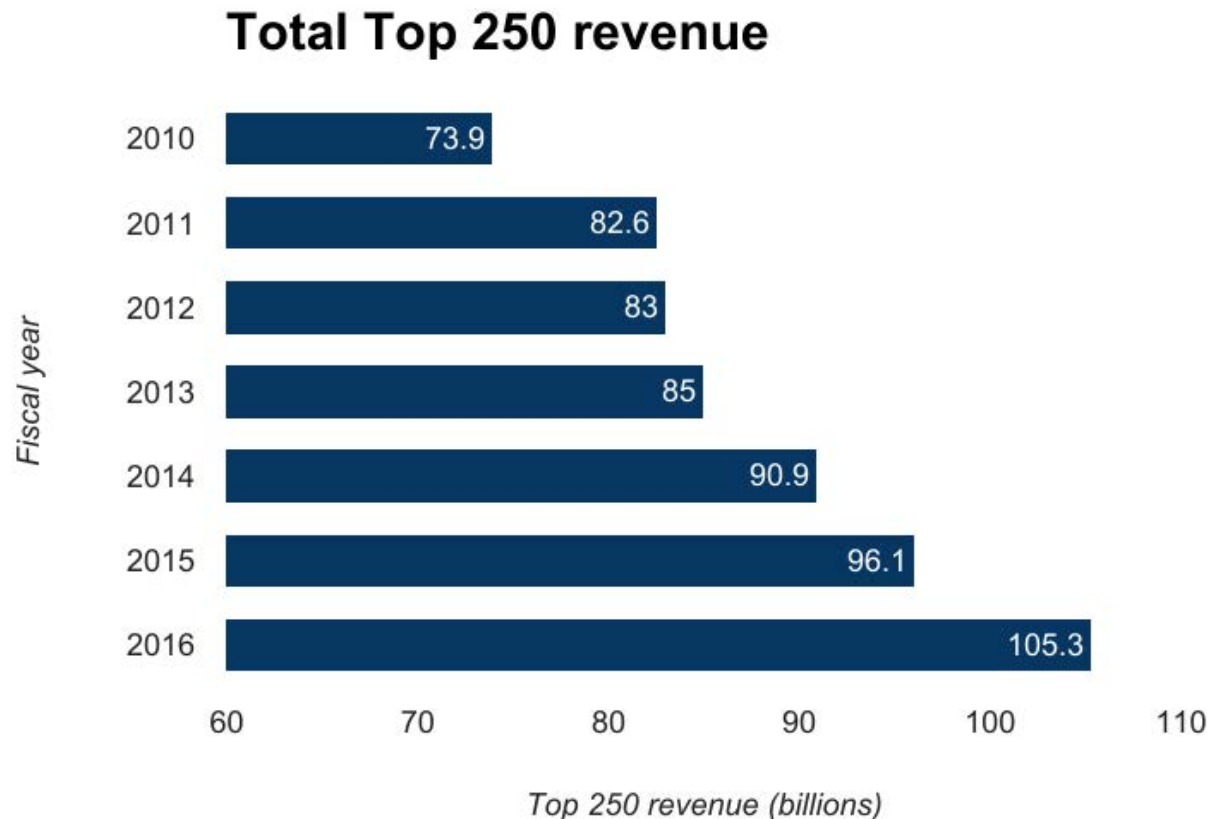
Branham300
2017 Edition



Canada's Top
ICT Companies



Another record year for Canada's Top 250



\$96.1 total revenue 2015

\$105.3 total revenue 2016

9.6% revenue growth





Welcome **Nataliya Mykol'ska**

Deputy Minister - Trade Representative of
Ukraine, Ministry of Economic Development
and Trade of Ukraine



MINISTRY
OF ECONOMIC DEVELOPMENT
AND TRADE OF UKRAINE





Welcome
Juan Turruellas,
Executive Vice-President, Worldwide
Business Development, SoftServe





Global Affairs
Canada

Welcome

Cameron MacKay,

Director General – Trade Sectors Bureau,
Global Affairs Canada



Branham300 – 2017 edition



J. Wayne Gudbranson

613-745-2282 x113

wgudbranson@branhamgroup.com

branhamgroup.com





Branham

B R A N H A M G R O U P I N C