

## Introduction

WIND Mobile is a Canadian wireless telecommunications provider operated by Globalive Communications Corporation. It was initially launched in the Greater Toronto and Hamilton Area, Ontario in 2009. WIND Mobile has approximately 600,000 active subscribers, making it tied with SaskTel Mobility for the fourth largest Canadian mobile operator (Tang, 2009, p. 6). As of January 2013, WIND was part of a global organization with over 200 million customers which operates in 16 countries with over 66, 000 employees (Tang, 2009, p. 6).

## History

Globalive's history summarized the path undertaken by WIND Mobile. It stated that: "Following the deregulation of the Canadian telecom industry in 1998, founder, Chairman and CEO Anthony Lacavera saw an opportunity- an opportunity to provide next-generation telecommunications solutions into a market dominated by very large, slow-moving incumbent operators. Globalive initially focused on bringing new technology and proprietary software solutions to traditional voice and data services and developing hosted solutions for business and white-label carrier customers" (Globalive, 2013).

In 2008, Globalive created Globalive Wireless, now operating as WIND Mobile, and secured a strategic investment from Orascom Telecom to enter the 2008 AWS Spectrum Auction. Globalive Wireless won wireless licenses across Canada excluding Quebec. In the following year the Canadian Radio-television and Telecommunications Commission (CRTC) conducted the first-ever public review of a telecom company and ultimately denied Globalive Wireless its operating license in October 2009. In December 2009 the Federal Cabinet intervened and Globalive Wireless launched its WIND Mobile service (Globalive, 2013).

Globalive's early success led the company to achieve the top spot on Profit Magazine's 2004 list of Canada's Fastest Growing companies. WIND Mobile continues to compete with telecommunications giants such as Telus, Bell and Rogers. This fast growing service provider is looking to expanding its reach throughout Canada and also internationally. A statement from the CEO from their website says:

“In early 2008, we founded WIND Mobile and have shepherded the company through numerous unprecedented technical, regulatory and legal challenges, all the while facing steady anti-competitive and predatory practices from the Big Three incumbent wireless carriers in Canada. WIND Mobile is now in its 4th year of operations and has surpassed 600,000 subscribers with steadily improving results (Globalive: Chairman's Message).”

## **Current Situation**

Recently WIND Mobile concluded an agreement to transfer WIND Mobile's founder, Chairman and CEO Anthony Lacavera's shares to Orascom. Mr. Lacavera plans to launch a new initiative, Globalive Capital, and will remain WIND Mobile's Chairman and CEO until closing. He will also continue in a non-operational capacity as WIND Mobile Canada's Honorary Chair. Upon closing Orascom will own an indirect 99.3% interest in Globalive Wireless Management Corp (Canada Newswire, 2013).

Other news from Canada Newswire about WIND Mobile is outlined below:

- In Canada WIND Mobile grew its subscriber base by 47% year over year.
- During the fourth quarter of 2012 WIND Mobile continued to strongly deliver on its "Value Plus" strategy; adding primarily postpaid subscribers while carefully managing prepaid economics for both voice and mobile broadband customers.
- WIND Mobile added 79,954 subscribers during the fourth quarter increasing its active subscriber base to 590,438. It should be highlighted that more than 70% of gross additions during the quarter were postpaid customers.

- On the commercial front WIND Mobile enjoyed a strong holiday season. A new media campaign and promotional offers were launched to support the important selling season.
- With respect to handsets, the strength of the Samsung Galaxy SIII continued throughout the quarter. The company also continued to add to its high-end Android devices with the introduction of the Samsung Galaxy Note II, the LG Optimus 4x, the SONY Xperia ION and the Huawei D-Quad.
- WIND Mobile maintained its focus on expanding its network and launched in Peterborough and WINDsor in the fourth quarter of 2012. Alongside of continuous network quality improvements, this increased its population coverage to exceed 14 million and increased sites on air to 1,300.
- WIND Mobile grew its distribution footprint and branded points-of-sale to reach 335 by end of 2012.

## Goals

An article from Marketing Magazine, “Wireless Faceoff”, featured an interview of the Chairman and CEO of WIND Mobile. From this interview he stated that WIND Mobile aims to win 1.5 million customers in three years by offering budget-friendly, prepaid, no-contract plans (Tang, 2009, p. 6). Lacavera also mentioned in this interview that their two main target consumers are “the disenfranchised” and “the underserved” (Tang, 2009, p. 6). After explaining what these terms meant, Lacavera is basically saying that WIND Mobile aims to target customers who are not satisfied with the services provided by other telecommunication giants such as Telus, Bell and Rogers. WIND Mobile aims to differentiate itself from these giants in order to remain competitive. This can be observed by the low-cost and no contracts strategy they are applying to win customers (Tang, 2009, p. 6).

# General Environment

## Demographic

As of 2011 Canada's population was 34,484 thousand with 68.5% of people falling between the ages of 15-64 (Statistics Canada, 2013). In recent years the Canadian market has experienced increasing popularity in wireless technology, especially for younger generations (MarketLine, 2012a). In 2011 one third of the population in Canada owned a mobile device (comScore, 2011). The majority of consumers use their phone to send text messages, take photos, and for those who own a smartphone also use applications. Nearly one third of all mobile users in Canada own a smartphone (comScore, 2011).

## Government

On January 29, 2013 the CRTC established a draft of regulations, the Wireless Code, to ensure that mobile consumers in Canada are receiving fair service and are signing honest contracts. The regulations apply to contracts and month-by-month services. The Wireless Code consists of seven major rules and restrictions including: usage monitors, bill caps, personalized terms, device unlocking, no fine print, transparent prices, and cancellations (CBC News, 2013). The table below shows a description of the rules.

**Table 1:** The Wireless Code Rules and Descriptions (CBC NEWS, 2013)

<b>Rule</b>	<b>Description</b>
<u>Usage Monitor</u>	A tool for customers to monitor their usage and raise awareness for additional charges if usage limits are exceeded.
<u>Bill Caps</u>	A service suspension point. When the mobile service bill exceeds a certain value service providers can suspend usage so that customers are not incurring endless amounts of additional charges.
<u>Personalized Terms</u>	Customers are allowed to set the summary of terms on a contract. (i.e. cancellation, usage monitor, provided services).
<u>Device Unlocking</u>	Customers are allowed to purchase and unlocked devices so they are free to switch carriers as they wish. A fee, determined by the original carrier, may be charged for this service.
<u>No Fine Print</u>	All terms on the service contract must be explicitly stated and legible.

<u>Transparent Prices</u>	When advertising prices, they must include all conditions and exceptions. (i.e. monthly payment amounts, taxes, government fees).
<u>Cancellations</u>	Customers are allowed to cancel their contract as they wish. The service carrier can charge a fee up to the discounts given to customers on contract.

**Environmental**

The major environmental concern with mobile phones is their disposal processes. On average mobile phones are used for 18 months before users upgrade to a newer device. Although approximately 96% of a device’s weight is recyclable, only 10% of the disposed mobile phones are recycled (Office of Consumer Affairs, 2012). The battery and the circuit board are not the only parts that contain toxic chemicals, but energy use and the infrastructure emit greenhouse gases and pollution as well (CTIA – The Wireless Association, 2011). Since inappropriate disposal can cause substantial damage to the environment, mobile service carriers have responded to this issue and initiated recycling programs for unused cell phones (Office of Consumer Affairs, 2012).

It is also recommended that consumers sell their obsolete mobile phones to others if the phones are still in usable condition. If a phone can still operate properly, harmful substances will not emit and is then safe to use (CTIA – The Wireless Association, 2011). The market of second-hand phones can significantly help the environment, as phones the lifespan of the device will be increased.

**Technological**

With today’s vast technological change there are nearly no limits to what a mobile device can do. Analyzing some of the technical trends of today, mobile payment and gesture-controlled interfaces are entering the market. With mobile payment options, consumers are no longer required to carry their credit cards and debit cards with them. This information is securely encrypted into the mobile phone application through the Near-Field Communication (NFC) technology (Knobloch, 2013). This technology allows users to tap their devices against a scanner, which will transfer the payment with no hassle. A current problem with the NFC is that not many smartphones provide this feature (Knobloch, 2013). Since the

beginning of the smartphone era, gestures were highly popular with touch screen devices. In the near future consumers will not only use their hands and fingers to operate their device, but it is expected that other body gestures may be the main control on devices as well (Knobloch, 2013).

More traditional changes include the infrastructure of mobile devices. As new devices are manufactured, new or improved features are promoted. It is certain to say that mobile phones will have the following features (Ricknäs, 2013):

- Large screens with full high definition displays to enhance entertainment.
- Quad-core processors to boost performance.
- Battery saving options to extend the mobile efficiency.
- Protection against dust and water.
- Higher resolution cameras.

## **Industry Environment**

### **Threat of New Entrants**

The threat of new entrants for WIND Mobile is moderate. There is a substantial capital investment required to enter the wireless telecommunications market. This is due to the high costs associated with establishing the necessary network infrastructure to cover Canada's vast geographic areas. Economies of scale can also serve as a high barrier to entry for this industry. There are only a few mobile service providers that currently dominate the Canadian market, making it difficult for new entrants to establish themselves. New carriers will need to enter the market on a large scale in order to be cost competitive. This is difficult due to the high fixed costs associated with establishing network infrastructure, operational support systems and developing a customer base (MarketLine, 2013).

Switching costs are also high in the Canadian telecommunications market. Many consumers sign contracts with their service provider in order to reduce the cost of their mobile handset. These contracts are expensive to terminate and can limit a new entrants ability to capture market share. The CRTC is

drafting a wireless code to help consumers better understand their commitments to cell phone carriers and possibly reduce fixed term contract lengths (Canadian Radio-television and Telecommunications Commission, 2013).

Canada's wireless market is highly regulated, which also serves as a barrier to entry. New entrants have to overcome regulations regarding access to distribution channels, infrastructure and networks (MarketLine, 2013). The Canadian government and the CRTC have been working on deregulating the wireless telecommunications industry. As of early 2013, the Canadian government has placed caps that limit that amount of bandwidth large carriers can buy within a geographic section (Euromonitor International, 2012). This will allow smaller carriers to compete and reduce barriers to entry for this industry.

### **Bargaining Power of Suppliers**

The bargaining power of suppliers is high for the wireless telecommunications industry. The major suppliers for this industry are handset providers, network equipment manufacturers and the government.

There are relatively few suppliers of wireless hardware and most of them are large manufacturers such as Apple, Nokia, Samsung, etc. (MarketLine, 2012). Consumer demand for these well-known products is high, causing wireless providers to have a weak negotiating power over these suppliers. WIND mobile is a relatively small buyer for wireless hardware manufacturers compared to other leading global telecommunication companies.

The major network equipment suppliers in Canada own and operate the networking equipment infrastructure, masts and base stations (MarketLine, 2012). Because of the low level of competitive pressure in the Canadian wireless telecommunications market, these suppliers have a high bargaining power. WIND Mobile also has low bargaining power with respect to government regulations and permissions. The federal government is the only supplier of bandwidth and licenses in the Canadian wireless market. Bandwidth is auctioned off to cell phone carriers and the prices they must pay can be significant (MarketLine, 2012).

## Bargaining Power of Buyers

The bargaining power of buyers is low to moderate for the wireless telecommunications industry. Three top carriers dominate Canada's wireless market. Because of this, there is low differentiation between cell phone carrier's plans and wireless devices. The market is dominated by a large number of individual and corporate buyers with no single consumer accounting for a significant fraction of a supplier's sales. Large corporate buyers will have higher bargaining power than individual consumers as they contribute a higher proportion to the wireless carrier's revenues.

Many wireless consumers are locked into fixed term contracts with their service provider. The use of long-term contracts has significantly reduced buyer's power due to high switching costs. Many people feel obligated to stay with their service provider because they cannot afford the high termination fee to end their wireless plan. WIND Mobile and other carriers do offer no contract and pre-paid plans, which increases consumers' bargaining power. With the introduction of WINDtab, consumers are able to slowly pay off the cost of their mobile device with 10% of each monthly bill going to this balance (WIND, 2013). This increases the bargaining power of buyers slightly, but if they wish to switch providers they will still owe the balance of their WINDtab.

## Threat of Substitutes

The main substitutes for wireless telecommunications are fixed-line telephones, Wi-Fi and voice over internet protocol (VoIP) (MarketLine, 2012). Wireless providers do not cover many areas in Canada and consumers are forced to utilize fixed-line communications. In 2011 fixed-line communications accounted for 55% of the telecommunication market share (MarketLine, 2012). Although fixed-lines account for a larger share of the market, the number of telephone lines in use has been steadily decreasing since 2007 (Euromonitor International, 2013). Fixed-lines offer few benefits compared to wireless devices and this market share will likely continue to decrease.

VoIP and Wi-Fi are more likely to create a threat for mobile carriers. These technologies allow consumers to communicate over the internet with little cost and are quickly increasing in popularity.

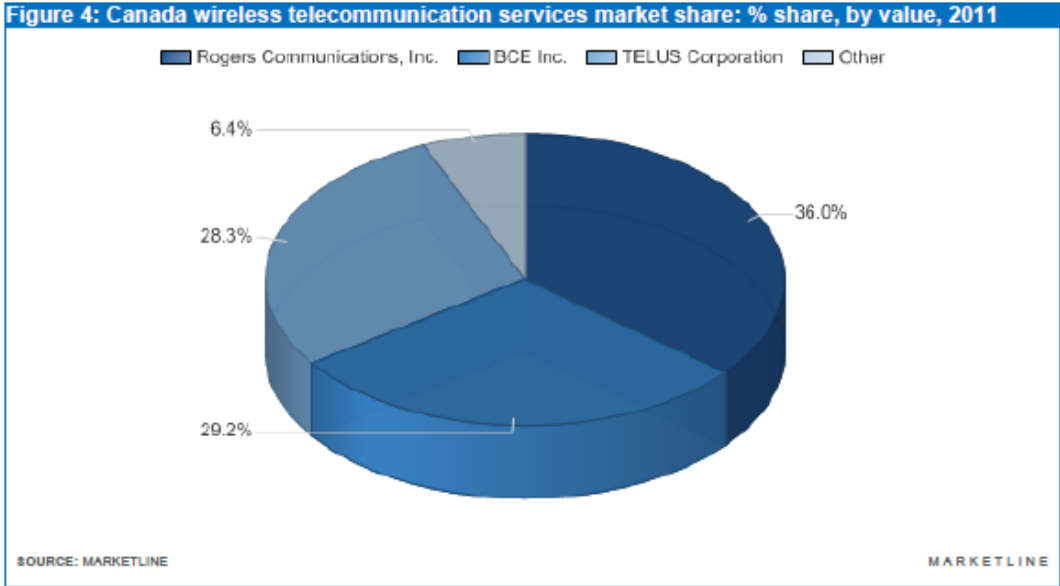


Video conferencing and messaging is made easy with VoIP applications such as Skype, Google Voice SlipDroid and Fring (Fretty, 2012). The fact that these applications are compatible with mobile operating systems provides some protection for wireless providers (MarketLine, 2012b). Even with this compatibility there is a moderate threat of substitutes as consumers may choose to take advantage of VoIP and other developing technologies, rather than purchase a cell phone.

### Intensity of Competitive Rivalry

The Canadian wireless industry is dominated by three major companies: TELUS, BCE and Rogers Communications. These carriers represented approximately 93.5% of the total market share in 2011 (MarketLine, 2012). There is an intense rivalry among this oligopoly to differentiate their products and services. Currently WIND Mobile focuses on a low cost strategy to attract and retain its customers. This puts the carrier in direct competition with other low cost providers such as Koodo, Virgin and Fido, which are owned by Telus, Bell and Rogers respectively (Thompson, 2011). Because many of Canada’s low cost providers are owned by the dominating oligopoly, this creates a fierce competitive landscape. These companies are able to incur a loss in the low cost market, without it substantially affecting overall revenues. Despite these challenges, WIND Mobile has been able to keep its costs low enough to become the number four wireless providers in Canada (Mint Global, 2013).

**Figure 1:** Canadian wireless telecommunication services market share (%) (MarketLine, 2012)



# Internal Environment

## Strengths

The two major strengths of WIND Mobile is their high growth rate and availability of high-end Android devices.

- High growth rate: WIND Mobile's subscriber base increased by 47% last year. Adding 79,954 customers in the fourth quarter of 2012 WIND Mobile reached a total subscriber base of 590,438. The majority of the increase was caused by their post-paid customer base which aligns with their strategic goals. They have also been extending their population coverage; reaching 14 million consumers within a short period of time (Holding, 2012).
- Abundance of high-end android handsets availability: WIND Mobile has the widest selection of high-end Android based handset collection available for their customers. Wind currently offers such devices as the Samsung S3, Samsung Galaxy Note II, LG Optimus 4x, SONY Xperia ION and Huawei D-Quad. Very few competitors have such an extensive collection of high-end Android based handsets. The differentiating factor for WIND Mobile is that they offer high-end handsets, but at a cheaper price with no hidden fees. The demand for Android based handsets has been substantially increasing over the past year, which allows the company to be competitive (Holding, 2012).

## Weaknesses

WIND Mobile faces the weaknesses of low market share and no supply of iPhones.

- Low market share: WIND Mobile owns 2% of the market share in the mobile telecommunication industry which is the one of lowest in the Canada. This can be challenging for WIND Mobile as new companies are entering the industry and their closest competitor, Mobilicity, is also striving to gain more market share (Business Monitor International, 2013).
- No iPhones: iPhones are one of highest demanded handsets in Canada, but currently WIND Mobile does not carry them and nor do they wish to offer them in the near future. According to WIND Mobile

their customer segment has a high demand for Android phones, however this means that they are not targeting the Apple users. This gives their competitors an advantage over the carrier (Sturgeon, 2012a).

## Opportunities

There are multiple opportunities in the market that WIND Mobile can consider to increase their competitive advantage.

- Offer Apple products: WIND Mobile has a strong potential to exploit the iPhone market. iPhone users have aggressively been growing over the last decade and the forecasted trends also suggest that it will keep on increasing in the near future (Citation). WIND Mobile can substantially increase their handset portfolio by offering Apple products such as iPhones and iPads. (Sturgeon, 2012a).
- Auction of 700 MHz spectrum: In 2012, the Canadian government announced a new competitive framework for its 700 MHz bandwidth auction. Market caps will be placed on how much prime spectrum large carriers are able to obtain per geographic section (Euromonitor International, 2012). This will give smaller carriers the ability to compete with the three dominating companies and provide a strong opportunity to increase their market share. Previously WIND mobile decided to restrain from the auction, but recently they have been reconsidering. It is essential for them to adapt to this technology as their competitors already decided to acquire it in 2013 (Business Monitor International, 2013).

## Threats

- Legal war with Telus: WIND Mobile launched a lawsuit against Telus in 2012. This lawsuit forces Telus to prove that the carrier is not breaching foreign investment laws. Since WIND Mobile has launch the the lawsuit, the carrier has been plagued by regulatory and legal challenges about its own investment structure (Sturgeon, 2012b). WIND Mobile is a fairly new company and having a regulatory war with one of Canada's biggest and most established wireless providers could be damaging. WIND Mobile's case could hurt the company financially and Telus' low-cost carrier, Koodo, could potentially start a price war. Telus has already commenced counter legal assaults against WIND Mobile and this could be damaging to the company (Sturgeon, 2012b).

- Price Increase because of 700 MHZ: According to Anthony Lacavera there is a possibility that Canadian mobile users will face higher prices due to the government policies regarding the 700 MHZ auction. One of WIND Mobile's core competencies is their affordable pricing and users will not be satisfied if prices increase (Technology Business Journal, 2012).

## **Strategic Challenges**

There are three strategic challenges that WIND Mobile faces. It is very important that these challenges are addressed so that WIND Mobile can continue to expand in the wireless telecommunications industry.

### **Increasing Market Share in a Highly Competitive Industry**

Because Canada's telecommunications industry is dominated by three major companies, it is extremely difficult for smaller carriers to compete. These large companies have high purchasing power and are able to cut plan prices through their low cost carriers. WIND Mobile could adopt the 700 MHZ technology in order to take advantage of the new price caps regulated by government auctions (Euromonitor, 2012). This would allow them to widen their spectrum and better position the firm to compete with this oligopoly. Continued focus on providing unlimited low-cost plans will also be an important strategy to gain market share. Consumers are charged inconsistent bills by other carriers within Canada. By offering unlimited fixed-price plans, WIND Mobile is transparent about their charges, which will be easier for customers to relate their mobile usage with the bill; setting this carrier apart from the competition (WIND, 2013). Subsidizing phones through WINDtab is also an important strategy for this carrier. Through this strategy, WIND Mobile is able to attract customers who do not want to be on a fixed-term contract.

### **Expanding Coverage Network**

Canada has a vast geography with few heavily populated cities. Currently WIND Mobile is only available in Vancouver, Edmonton, Calgary, the Greater Toronto Area, Hamilton, Ottawa,

Kitchener/Waterloo and Guelph (Wind, 2013). The company should continue expansion in areas surrounding heavily populated cities to gain a high customer base. WIND Mobile could also look at expanding their network to smaller cities that are dominated by their competitors. By focusing expansion on higher populated areas, Wind will realize a higher return on the investment required to fund the network expansion. According to the Canadian telecommunications report, coverage is an important milestone for any carrier to reach the critical mass. Wind Mobile should reach critical mass once they have reached an optimum market share such as 15% or more (Business Monitor International, 2013).

### **Competing with Lower Costs**

WIND Mobile has built its customer base by offering wireless plans at low costs. In order to remain competitive in this market, WIND will have to continue to keep their operating costs low. WIND Mobiles' prepaid plans allow the carrier to reduce costs associated with unpaid bills. Expanding coverage areas will increase WIND Mobile's operating costs. According to the Canadian telecommunications report, one of the major weaknesses for mobile carriers in Canada is the coverage of their networks. Even the big three are unable to cover most of the country.(Business Monitor International, 2013). Although there will be costs associated with expansion opportunities, if WIND Mobile focuses on highly populated areas, they should be able to achieve a high return on their investment. Overall WIND Mobile could achieve economies of scale and lower their costs per user. These challenges should be addressed strategically to keep WIND Mobile's competitive advantage against larger carriers. Their expansion process needs to be done with careful strategic planning as there are vast areas WIND Mobile can potentially exploit across Canada.

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