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## Central American and Caribbean Unified Communications and Collaboration Solutions Market

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F R O S T & S U L L I V A N



Market  
Engineering

**Analysis of the Central American and Caribbean Unified  
Communications and Collaboration Solutions Market  
How has the market recently performed?**

May 2012

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# Executive Summary

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- Central America and Caribbean (CaCar) is the smallest Latin American market, representing around xx percent of regional revenue.
- The growth expected in 2011 is xx.x percent. Unified communications (UC) client and videoconferencing are the segments that will drive this growth.
- The competitive landscape is dominated by the traditional vendors, with a high level of market concentration.
- During 2011–2017, the market will grow around x to xx percent year over year. The use of UC solutions is expect to grow as more international companies deploy new office branches at a regional level.

# Market Overview—Definitions

The key application segments and enabling platforms that form the total UC framework include:

- Enterprise Telephony (traditional telephony, IP telephony, IP softphones, and desk phones)
  - Enterprise telephony includes private branch exchange (PBX), IP private branch exchange (IP PBX) systems, and IP hard phones and softphones. Enterprise telephony also includes voice gateways sold with telephony solutions.
- E-mail On-premises Server Licenses
  - On-premises e-mail includes enterprise server-side and client-side software for personal computer (PC) desktops. IBM Lotus Notes/Domino, Microsoft Exchange/Outlook, and Novell GroupWise are examples of on-premises enterprise e-mail platforms. These vendors also provide Web and e-mail clients for mobile devices.
  - For market sizing, this study takes the average price of an e-mail seat to include client-access licenses and other server software costs for the maintenance of existing seats, new licenses, and upgrades. The seat count does not include free e-mail seats or consumer e-mail.
- Unified Messaging (UM)
  - UM includes applications integrating the storage and accessibility of voice, fax, and e-mail messages to a single mailbox that can be accessed through e-mail, telephone, Web browser, or a unified client.

# Market Overview—Key Questions This Study Will Answer

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Is the market growing? How long will it continue to grow and at what rate?

Is this an industry or a market? Will these companies/products/services continue to exist or will they be acquired by other companies? Will the products/services become features in other markets?

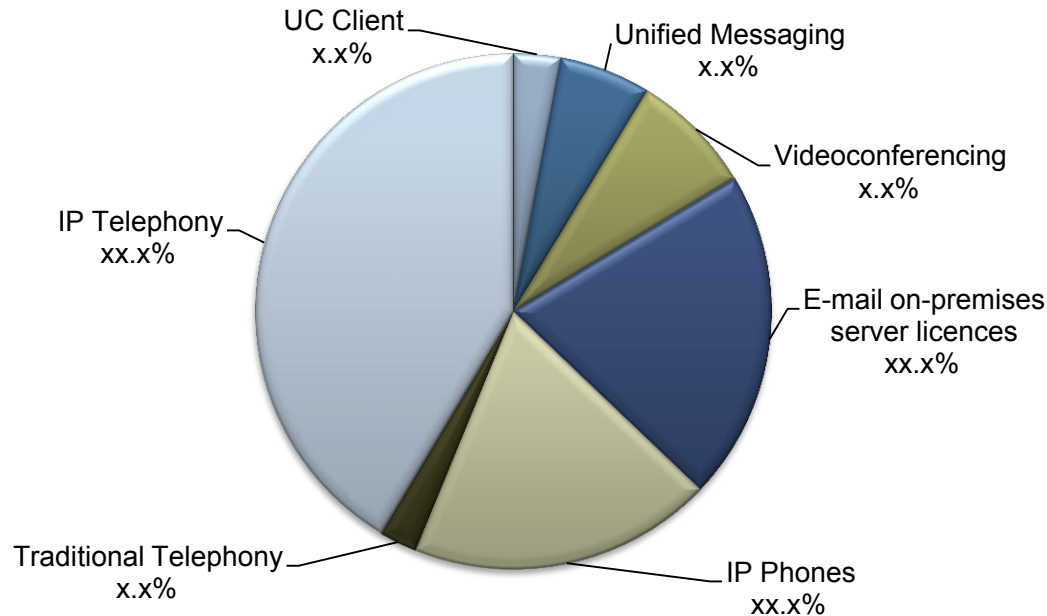
Which technology trends will affect the unified communications market?

Are the products and services offered today meeting customer needs, or is there additional development needed?

Are the vendors in the space ready to offer new services and integrate them into a new platform?

# Market Overview—Segmentation

**Percent Sales Breakdown by Application**  
**Total UC and Collaboration Solutions Market: CaCar, 2010**



Note: All figures are rounded. The base year is 2010.