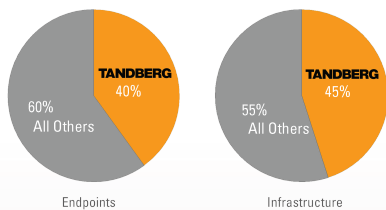


TANDBERG INDUSTRY PROFILE

TANDBERG See: possibilities

2008 Market Share- Endpoints & Telepresence

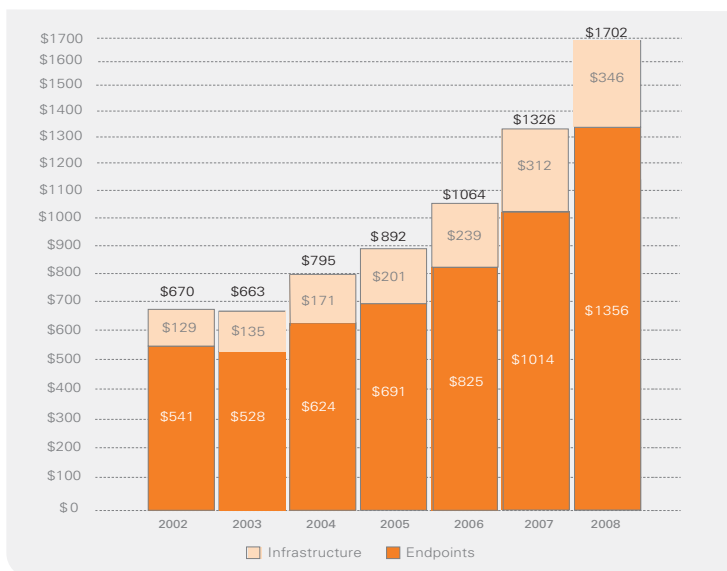


TANDBERG operates in several areas within the visual communication industry as it is currently defined: telepresence and video conferencing endpoints (including systems used in meeting rooms, industry applications, and on personal desktops), and infrastructure products (telepresence servers, bridges, gateways, gatekeepers and management tools).

OVERALL MARKET SIZE AND GROWTH

The total market size for the global video conferencing market in 2008 was \$1.7 billion. The compound annual growth rate (CAGR) for the period 2006 to 2008 was 27% for the overall market.

Global Videoconferencing Market Size History



VIDEO CONFERENCING ENDPOINTS

The endpoint market had worldwide shipments of approximately 230,000 units in 2008, representing 19% CAGR since 2006. In terms of revenue, the global market reached \$1.36 billion, a 29% CAGR since 2006. In both 2007 and 2008, TANDBERG maintained its leadership in the global endpoint market, with 40% share.

The largest region for endpoint sales is currently North America, with this region accounting for 37% of revenue. Europe, Middle East & Africa (EMEA) is the second largest region in terms of revenue, accounting for 33%, followed by Asia Pacific (APAC) with 27%. The remainder of the market is accounted for by the Caribbean and Latin America Region (CALA). The endpoints market is forecasted to reach a total of \$3.2 billion and 660,000 units sold worldwide by 2014.

INFRASTRUCTURE PRODUCTS

The infrastructure segment represented \$346 million worldwide in 2008 and is forecasted to grow to \$854 million by 2014. TANDBERG's share of the infrastructure market for 2008 was 45%.

In 2008, Americas accounted for 44%, EMEA 29% and APAC 27% of the global infrastructure market.

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Sources: Wainhouse Research, Frost & Sullivan