


State of Wireless 2026

Unlocking the Multiplier Effect: How Strategic Wireless Investments Drive Government Outcomes in the AI Era



Government Organizations



Executive summary

Wireless connectivity has evolved from administrative convenience to a mission-critical infrastructure that determines service delivery excellence and constituent satisfaction. Modern government organizations depend entirely on robust, resilient networks to serve the public, coordinate emergency response, manage public facilities, and protect sensitive data across distributed sites.

The stakes are exceptionally high: a network failure during emergency operations can delay crisis response, disrupt public services, and compromise public safety. Security breaches expose residents' data, violate privacy regulations, and erode the public trust that forms the foundation of government legitimacy.

Government organizations recognize this challenge and are meeting it with investment in wireless technologies to create impact. Nearly seven in 10 (70%) report that wireless investments have had a positive impact on operational efficiency, more than seven in 10 (71%) see employee productivity improvements, and two thirds (67%) report enhanced public engagement. More than six in 10 (63%) experience positive revenue impacts through cost savings and improved service delivery. For a sector under constant pressure to deliver efficient public services, manage constrained budgets, and maintain cybersecurity resilience, wireless has become the foundation on which excellence rests.

Yet this sector faces a paradox that is both opportunity and threat. Wireless is essential for deploying artificial intelligence applications that can optimize resource allocation, enable predictive maintenance of public infrastructure, and improve constituent service delivery. However, these same AI capabilities introduce unprecedented complexity, create new security vulnerabilities that threaten both residents' data and critical infrastructure, and intensify competition for specialized talent in environments where private sector compensation often exceeds government pay scales. Government organizations need advanced wireless and AI-integrated skills precisely when attracting talent to this domain has become more challenging.

This report explores this paradox within government and public services. It examines how government organizations can harness strategic wireless investments to unlock a multiplier effect, delivering measurable returns across operational efficiency, public satisfaction, employee productivity, and fiscal responsibility.

Our report also identifies three interconnected barriers that currently prevent many government organizations from realizing the full potential of their wireless infrastructure: mounting operational complexity driven by distributed multi-site environments and diverse user populations; escalating security threats targeting residents' data and critical infrastructure; and acute talent shortages as skilled professionals gravitate toward private sector opportunities and specialized AI roles.

Organizations able to address all three barriers simultaneously achieve substantially better outcomes, while those that address only one or two remain trapped in reactive cycles and are less able to modernize.

This report is grounded in Wi-Fi as the primary enterprise connectivity layer, while examining the broader wireless ecosystem it enables, including AI-driven applications, IoT and OT environments, and emerging enterprise use cases.

The opportunity: Wi-Fi as a strategic engine for government organizations

Government spending on wireless infrastructure is accelerating with more than one fifth (23%) of government organizations report budget increases of more than 50% over the past four to five years. That trend is set to continue with 26% expecting increases of at least 50% in budgets over the next four to five years – the most among all sectors we surveyed – signaling that wireless will play an increasingly critical role in government service delivery and modernization.

This investment is not speculative. Government leaders recognize that wireless connectivity underpins modern public service delivery. Emergency responders rely on seamless networks to coordinate crises, access real time intelligence, and communicate with command centers across jurisdictions. Smart city sensors track traffic, air quality, and infrastructure conditions, enabling proactive maintenance and efficient resource deployment. Mobile

devices give field staff instant access to case management systems, inspection data, and compliance information, improving service quality while reducing administrative burden. IoT sensors in public facilities monitor equipment and environmental conditions, alerting maintenance teams to potential failures before they disrupt public services.

New applications further underline wireless as a strategic efficiency tool. Governments are piloting autonomous vehicles for facility management and deploying robots for infrastructure inspection and public space upkeep – systems that demand ultra reliable, low latency connectivity to operate safely. Smart building technologies use wireless sensors to optimize energy consumption, monitor air quality, and adjust climate control based on occupancy, reducing costs while maintaining comfort. Digital service platforms extend public access to government services from any location, minimizing in person visits and improving accessibility for underserved populations.

Government organizations are leveraging wireless across an array of uses that span the entire public service environment, including physical security systems

(58%), Internet of Things connectivity (49%), and AI applications and workloads (50%). These deployment rates demonstrate how wireless has become foundational infrastructure rather than optional technology in modern government operations.

In government organizations, wireless modernization directly translates into impact: operational efficiency (70%), employee productivity (71%), public engagement (67%), and cost effectiveness through improved service delivery (63%).

When government organizations prioritize wireless strategically and align investments with constituents' priorities, employee mobility requirements, and public safety goals, they achieve a multiplier effect: one investment in modern wireless infrastructure yields measurable returns across multiple dimensions simultaneously, including improved constituent satisfaction, faster service delivery, enhanced employee effectiveness, reduced facility operating costs, and stronger outcomes in emergency preparedness and response.

The modernization of wireless infrastructure is accelerating this effect. Leaders in government understand that aging wireless standards such as Wi-Fi 5 cannot support the density of connected devices across distributed facilities, bandwidth demands of real-time video analytics for public safety, and latency requirements of emergency response systems. Seven percent (7%) of government organizations have deployed Wi-Fi 6E, with a further 24% planning rollouts in the next 12 months. Additionally, 5% have already deployed Wi-Fi 7, with 24% planning implementation in the next 12 months. This demonstrates an understanding of how the 6 GHz spectrum and Wi-Fi 7 capabilities can provide clean bandwidth, consistent performance, and reliable connectivity required for emergency communication systems, smart city applications, and public service platforms serving diverse populations across multiple sites.

In addition – and as we will discover later in the report – organizations deploying 6 GHz spectrum show measurably higher rates of AI application deployment compared to non-adopters, suggesting that advanced wireless infrastructure is a prerequisite for government digital transformation and smart city innovation.

Government organizations are leveraging wireless across a variety of use cases

	Currently deployed (%)	Planning to deploy (%)
Operational Visibility and Flow Analytics	50%	47%
AI Applications and Workloads	50%	47%
Internet of Things	49%	46%
Real-time Asset and Equipment Tracking	51%	46%
Supply Chain and Inventory Intelligence	50%	43%
Guest Wireless	53%	42%
Remote Worker Connectivity	57%	41%
Physical Security (CCTV)	58%	40%
Customer and User Experience Enhancement	57%	40%

Current footprint = Deployed + Pilot stage

Future expansion = Planned next year + Planned in next 2-5 years

The wireless AI paradox in government organizations

Government leaders face a paradox that defines the wireless opportunity. Artificial intelligence is simultaneously the leading driver of returns on investment in wireless and the primary source of escalating challenges that constrain those returns.

On one hand, organizations deploying AI applications recognize wireless as strategically critical to public service operations. Nearly two-thirds (62%) of leaders in the sector whose organizations are deploying AI view wireless as strategically critical, compared to 46% of organizations not deploying AI. This heightened recognition reflects reality:

- AI workloads demand higher performing, more resilient wireless networks than traditional government applications.
- Automated systems for coordinating field services, optimizing facility operations, or managing emergency response all depend on reliable, low-latency connectivity

that cannot tolerate interruption, particularly during crisis situations when network performance determines response effectiveness.

- Predictive maintenance systems for public infrastructure require continuous access to sensor data from facilities distributed across jurisdictions.
- Resource optimization tools need immediate connectivity to multiple departmental systems, financial databases, and operational platforms spanning siloed legacy systems.

Government organizations that integrate wireless optimization into their AI deployment strategies are realizing substantially stronger outcomes. More than two thirds (68%) of government organizations deploying AI report positive impact from wireless investments on service delivery effectiveness and operational efficiency (70%), exceeding non-AI organizations by meaningful margins. This performance demonstrates that AI and wireless are mutually reinforcing investments in government environments, where constituent satisfaction and fiscal responsibility translate directly to public trust and mission success.

However, AI is simultaneously amplifying the very challenges that prevent government organizations from realizing wireless potential. The same AI technologies that enable predictive resource allocation and automated constituent services are also creating increased operational complexity for nearly every (98%) government organization, with new security threats and intensified competition for talent preventing them from achieving the full benefit of wireless modernization.

This paradox is especially acute in government because the consequences of failure extend beyond operational impact to public safety and democratic accountability. A security breach in government does not simply compromise data; it exposes residents' information, threatens critical infrastructure, enables access to sensitive systems, and can violate privacy regulations. An operational failure that degrades network performance does not simply reduce productivity; it can delay emergency response, prevent access to critical constituent services, or compromise public safety systems.

These high stakes make the wireless AI paradox one of the most significant challenges facing leaders in government. Addressing it requires government organizations to modernize infrastructure, implement automation, and strengthen security simultaneously while also competing with the private sector to secure the right talent to support organizational goals.

Barrier 1: Operational complexity overwhelms current capabilities

Escalating operational complexity, reported by nearly every wireless leader in government, is the direct result of a structural transformation in the sector. The operational landscape is now defined by distributed facilities across jurisdictions, diverse user populations, legacy systems that must integrate with modern platforms, and security demands that exceed private sector standards.

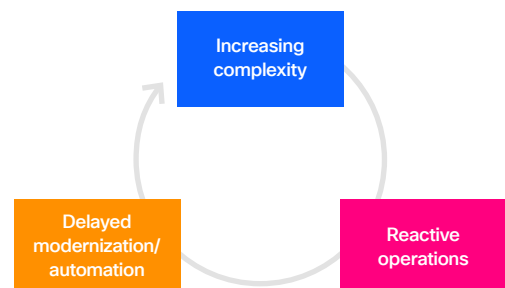
Government organizations cite three core drivers of this growing complexity. More than four in 10 (43%) rank mission-critical IT, IoT, and OT workloads highest, increasingly including AI-driven applications. These workloads include everything from emergency dispatch systems that cannot tolerate connectivity loss, to traffic

management systems that require consistent performance. Another key driver of complexity is security risks (42%), reflecting the expanded attack surface created by distributed multi-site networks where compromised devices can threaten both resident data integrity and public infrastructure safety.

Bandwidth demand increase or unpredictability follows closely at 37% and tells the story of a sector dealing with the diverse mix of emergency response video, constituent service applications, smart city sensors, and public WiFi that coexist on government networks serving populations with varying technology access and digital literacy.

Complexity translates directly into operational strain. Over one-third (39%) of government organizations report their wireless support teams handle at least 50 tickets per week, consuming hundreds of hours each month on issue management instead of strategic improvements. Nearly six in ten (59%) teams spend most of their time on reactive troubleshooting – the highest rate across all industries surveyed – addressing urgent problems as they arise rather than preventing them through proactive planning and optimization.

This reactive posture creates a self-reinforcing cycle that is especially damaging in government, where service interruptions affect public access to essential services and budget constraints limit staff expansion. Complexity drives reactive work, which absorbs all available resources and defers modernization efforts such as infrastructure upgrades, enhanced security protocols, training, and certification. As delays mount, complexity persists and often intensifies with the addition of new facilities, smart city sensors, and service channels layered onto networks built for simpler demands. Teams remain trapped in a reactive cycle that prevents them from implementing solutions to reduce complexity and improve service delivery.



Amplifying this cycle is a lack of visibility across distributed multi-site government environments. Nearly nine in 10 (90%) government organizations report visibility gaps that impair their ability to troubleshoot Wi-Fi issues effectively, exceeding the industry average. This represents millions of hours wasted across the public sector.

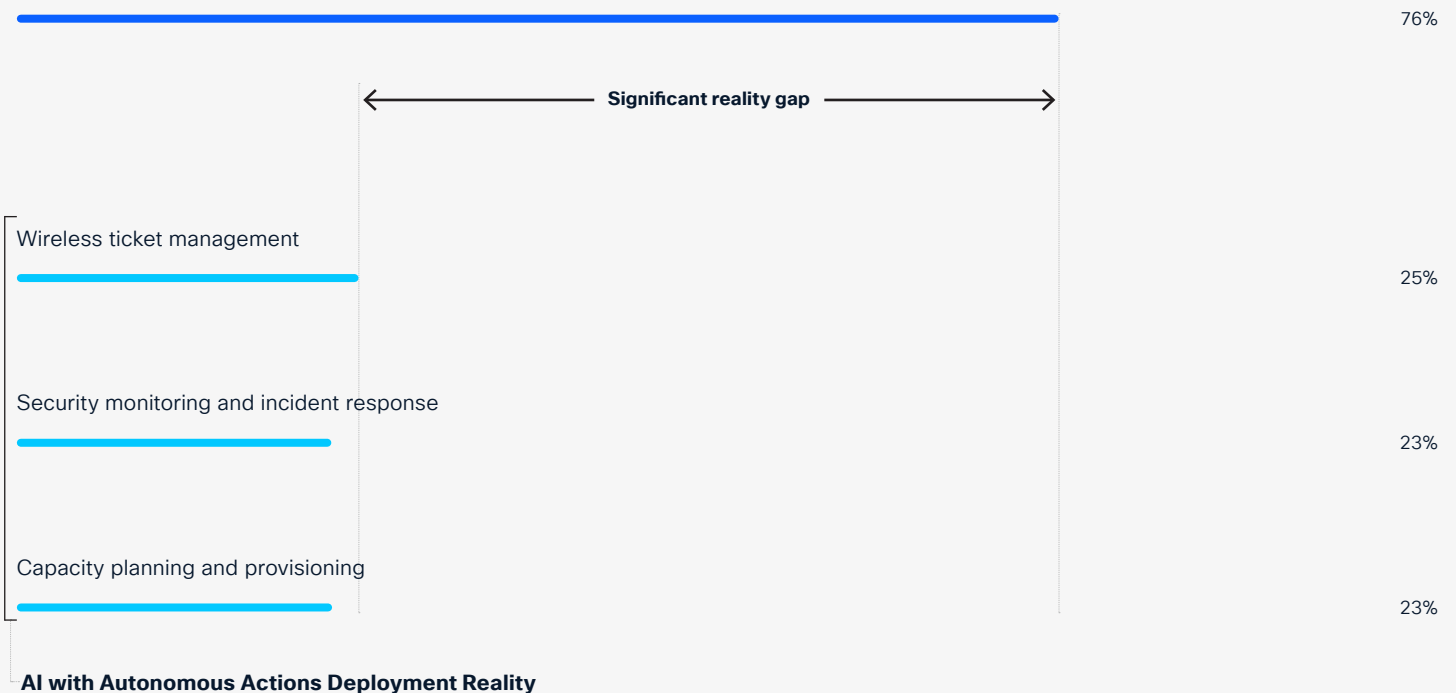
This visibility gap creates a particularly dangerous dynamic in government settings where service continuity and emergency response capabilities are vital. Wireless networks become scapegoats for problems originating elsewhere. A constituent service portal responds slowly, for example, and staff suspect the network is experiencing congestion. The IT team spends hours investigating wireless performance across multiple facilities, only to discover the problem was a database query timeout in a legacy system or a cloud service degradation beyond government control.

More than six in 10 (61%) government respondents report that at least 10% of incidents are inaccurately attributed to wireless, slightly below the global average but representing substantial wasted effort across organizations operating with constrained IT budgets. Each misattributed incident wastes an average of 18 hours across teams – time that could be better spent dealing with real problems.

In response to this escalating complexity, those responsible for wireless in government organizations overwhelmingly believe that AI represents the most promising path forward. More than three quarters (76%) would prefer AI with automation to fully or mostly handle routine wireless operational tasks, slightly below the global average but nonetheless representing a strong preference. The appeal is straightforward: automation would free IT professionals to work on strategic priorities directly supporting constituent service goals rather than handling repetitive ticket work that diverts attention from mission-critical improvements. AI systems could detect and resolve many incidents before humans become aware the problems even exist.

The AI gap in government organizations: Desire versus reality

Preference for AI with autonomous actions



Despite this clear preference, there is a significant gap in rollouts. A quarter (25%) of government organizations have implemented automation for wireless ticket management, slightly below the global average of 29%. Just under a quarter (23%) automate security monitoring and incident response, well below the global average (29%) and reflecting government’s unique challenge implementing AI-driven security tools that must protect residents’ data while complying with privacy regulations and procurement requirements.

Government leaders recognize the solution but face constraints implementing at scale across distributed facilities with diverse user populations, legacy systems that resist integration, procurement processes that delay technology adoption, and budget cycles that limit ability to invest in modern automation platforms.

The impact on government performance is measurable and directly affects outcomes. Organizations that have implemented autonomous AI report dramatic time savings, freeing an average of three hours and 20 minutes per person per day. These organizations are four times more likely to rate their network operations as very simple and resolve wireless tickets 12% faster than manual operations.

Scaling these benefits across all government organizations would free up thousands of hours that could be used to improve service to constituents, emergency preparedness, and public facility optimization. Yet that scaling remains constrained by the very complexity and talent shortages that AIOps implementation would help resolve, particularly in government environments where IT staff must support diverse user populations and operate within constrained budgets that limit ability to adopt emerging technologies rapidly.

Barrier 2: Wireless security under siege

Government organizations face increasing security threats that are more frequent, more damaging, and more difficult to detect and remedy than in previous years. The threat environment is particularly severe in government because wireless networks carry both constituent service traffic and communications that directly support critical infrastructure, emergency response, and sensitive operations. More than three quarters (79%) of government organizations have experienced at least one wireless security incident in the past 12 months. While this is below the average of industries we surveyed, it still represents a substantial risk in a sector where compromised systems can threaten public safety, expose residents’ information, and undermine institutions.

More than four in 10 (46%) – the highest across all industries – report escalating wireless threats over the past two years, with many saying they have become more frequent, damaging, and difficult to detect and remedy. Significantly, government organizations show elevated expectations for future threats, with more than three quarters (76%) anticipating increased wireless security incidents over the next two years, the highest rate across all industries and reflecting the intensification of threats to public sector networks, critical infrastructure, and residents’ data.

Government organizations security threat environment



The threat environment in government is distinctive and our research revealed five critical contributors to increased security vulnerability in this sector:

1. AI-generated cyberattacks (32%). Automated attacks exploit legacy systems, map service relationships, and adapt strategies in real time at a scale far beyond human capacity.
2. Human error and insider risks (28%). The highest rate across industries, reflecting diverse user populations where employees, contractors, and residents connect with varying levels of security awareness.
3. Remote and hybrid work (27%). Expanded access dissolves traditional network perimeters, creating new vulnerabilities that demand more sophisticated defenses.
4. Shortage of skilled personnel (27%). Governments struggle to recruit and retain experts across cybersecurity, privacy, infrastructure protection, and wireless technologies while competing with private-sector pay.
5. Complex security layers (26%). Networks must segment constituent traffic, protect sensitive data, and secure infrastructure across jurisdictions, adding management challenges that heighten risk.

For government, compromised IoT or operational technology devices carry consequences that extend far beyond typical security incidents. Over one third (34%) of affected organizations report disruption from compromised IoT or OT systems, slightly below the global average but far more severe in public service contexts. A corrupted traffic management system can misroute emergency vehicles, a failed environmental monitor can allow unsafe conditions in public facilities, a sensor network can deliver false readings that misguide infrastructure maintenance, or an emergency notification system can falter during crisis response. These scenarios move beyond IT problems and become public safety risks.

The financial impact can be substantial too. More than half (54%) of government organizations have experienced financial losses from wireless security incidents, slightly below the industry average but representing substantial costs across organizations operating with taxpayer funds and facing budgetary accountability. More than half (52%) report losses exceeding US\$1m in the past year, with 17% experiencing losses between US\$10m and US\$50m, Eight percent told us they had absorbed losses in excess of US\$50m.

Financial losses from wireless security incidents in government organizations

Less than US\$1 million	40%
US\$1-10 million	27%
US\$10-50 million	17%
Over US\$50 million	8%

These figures only capture direct costs: remediation, forensic investigation, service restoration, and incident response. Indirect costs compound the damage: loss of public trust affects more than a third (35%) of government organizations, while regulatory penalties or compliance consequences impact 31%. In government contexts, security incidents can violate privacy regulations protecting residents' data, trigger oversight investigations, compromise election infrastructure integrity, and damage public confidence in government capability to deliver essential services securely.

Despite these threats, more than three quarters (77%) of government organizations are confident that the measures they have in place will adequately protect their wireless networks. Yet simultaneously, 76% predict security failures will increase over the next two years, the highest rate across all industries. This contradiction likely reflects divergent perspectives between executive leadership and frontline technical staff managing distributed government networks. Executives tend to perceive organizations as adequately defended based on policies and investments while staff managing networks daily understand threat evolution more directly, particularly how adversaries increasingly target government networks and how legacy systems cannot implement modern security protocols without costly replacement.

Government organizations cite three primary barriers to improving wireless security: implementation complexity, legacy infrastructure, and performance concerns. These challenges carry distinctive weight in government contexts: operational complexity makes security deployment difficult where constituent services cannot be interrupted; legacy

systems often operate for decades without modernization; and performance concerns reflect the need for consistent network behavior, where added security cannot introduce latency that disrupts emergency communications or public access.

These barriers mirror broader wireless challenges. Talent shortages leave organizations without the expertise to deploy modern protocols across distributed networks, while competing with private-sector pay. Visibility gaps prevent teams from fully understanding threats across administrative offices, public facilities, emergency operations centers, and smart city infrastructure, each with different communication patterns and requirements.

The result is a widening vulnerability gap. As threats escalate, government organizations remain constrained by outdated systems, distributed complexity, and limited talent. Accountability pressures are acute, since failures can disrupt essential services, threaten public safety, and erode residents' confidence in government capability.

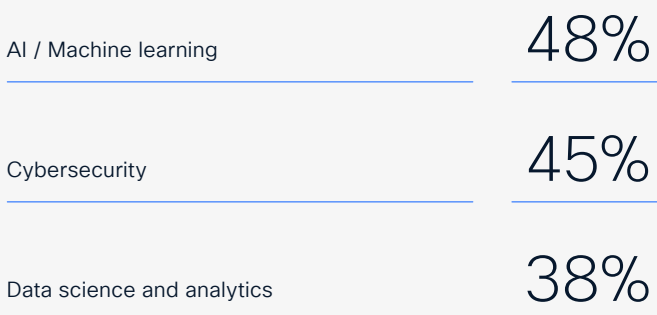
Barrier 3: Wireless competition for AI skills

Government organizations face an acute talent crisis that directly inhibits modernization and exacerbates both complexity and security challenges across distributed networks serving diverse populations. More than nine in 10 (90%) report difficulty hiring wireless professionals with the skills required for modern network operations, the highest rate across all industries surveyed. This represents a structural problem affecting the sector's ability to maintain and modernize infrastructure that covers administrative offices, public facilities, emergency operations centers, and smart city systems with increasingly demanding connectivity requirements.

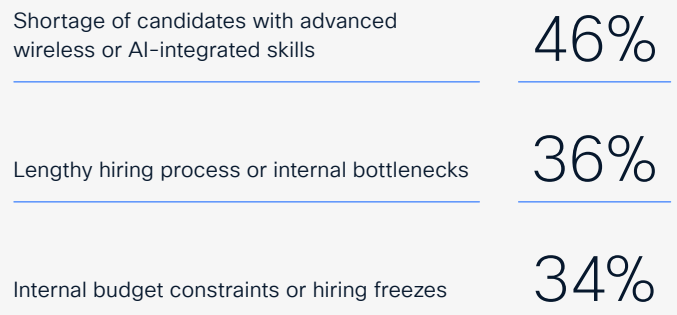
Talent competition is fierce and unequal. Government organizations compete not only with each other but also with industries offering higher pay and roles seen as stronger career bets. AI and machine learning are the top draw, with 48% of government organizations citing them as the primary competitor for wireless talent. This reflects government's own investment in AI while losing professionals to private sector roles with far greater compensation. Cybersecurity follows at 45%, driven by the visibility of protecting residents' data and critical infrastructure. Software engineering and application development rank third at 38%, as government loses skilled staff to positions perceived as more innovative, better compensated, and closely tied to high profile digital transformation initiatives.

Government organizations talent competition and hiring challenges

Domains attracting talent away from wireless



Primary reasons for difficulty in hiring wireless talent



The root cause is simple: a shortage of candidates with advanced wireless or AI-integrated skills ranks as the primary barrier to hiring wireless talent for 46% of respondents. However, government organizations face additional challenges that private sector organizations do not encounter: lengthy hiring processes or internal bottlenecks affect 36% of organizations, while internal budget constraints or hiring freezes are also at 36%, reflecting the fiscal pressures government organizations face and the difficulty competing with private sector compensation.

The result is a skills gap that translates into higher operating costs (29%), lower morale among wireless teams (36%), and reduced capacity for innovation (29%). The combination of constrained budgets, lengthy procurement processes, and competition from both private sector and other government IT specializations creates a talent environment where government organizations struggle to attract and retain the wireless expertise required for modern network operations.

The correlation between talent shortages and poor outcomes is unmistakable, and government organizations struggling to hire specialists expect wireless security failures to increase at substantially higher rates. In government, talent constraints can directly impact operational risk management, regulatory compliance with privacy protections, and democratic accountability.

Wireless resilience in government starts with certified expertise that can cover both traditional wireless technologies and government-specific requirements. Teams with deeper wireless credentials deploy modern security protocols faster and more comprehensively across distributed government networks.

Those with at least 50% of personnel certified in wireless technologies are 17% more likely to implement full WPA3 security, reducing exposure to attacks exploiting legacy protocols. They are also 17% more likely to use certificate-based or profile-based authentication, minimizing access conflicts and lowering troubleshooting volume during constituent service hours when network degradation affects public access to essential government services.

The implication is clear. Government organizations that invest early in talent development and certification programs gain an advantage as complexity increases. Those that delay investment until talent shortages become acute face substantially larger hiring costs extending recruitment timelines, extended project timelines delaying constituent service improvements, and reduced capacity to modernize networks supporting digital government transformation. In government, where the cost of delayed modernization includes both financial losses from security incidents affecting taxpayer funds and lost opportunities to improve constituent services, this investment becomes mission critical for maintaining public sector capability and constituent trust in government effectiveness.

Conclusion

Government organizations face a paradox that is among the most significant challenges in the public sector. Wireless infrastructure has become essential to modern constituent service excellence, emergency response coordination, and efficient government operations.

AI applications promise to optimize resource allocation, enable predictive maintenance of public infrastructure, and improve constituent service delivery through automated systems serving diverse populations. Yet realizing this potential requires IT leaders in government to address three deeply interconnected barriers simultaneously rather than sequentially.

Operational complexity traps IT teams in reactive cycles, preventing modernization of distributed networks. Security threats escalate faster than government organizations can deploy defenses. Talent shortages amplify both challenges while constraining the resources available to address them, particularly in government where wireless expertise must combine with understanding of privacy regulations, procurement processes, and public service requirements.

Dealing with one barrier without addressing the others leaves the fundamental paradox intact. A government organization that modernizes infrastructure without implementing automation continues to drown in reactive work. A government organization that implements automation without deploying modern security efficiently leaves itself vulnerable to attack. A government organization that modernizes security without building certified expertise risks deploying protections that teams cannot properly implement or maintain across complex environments.

Yet government organizations that address all three barriers simultaneously achieve substantially better outcomes on their investment in wireless investments. They are able to capture the multiplier effect where one network upgrade generates simultaneous improvements across constituent satisfaction, employee effectiveness, fiscal responsibility, emergency response capability,

and public trust in government service delivery. They experience stronger improvements in operational efficiency, faster issue resolution when wireless connectivity affects services, lower security incident costs, and improved employee satisfaction as teams shift from reactive firefighting to strategic optimization.

The multiplier effect is strongest when all dimensions align. Modern infrastructure enables digital innovations such as smart city applications and accessible services; automation frees teams to modernize and optimize networks for demanding public needs; strong security protects residents' data and critical infrastructure while ensuring compliance; and certified talent sustains operations across distributed environments adapting to evolving expectations and technologies.

The financial case is clear. Governments that deploy modern wireless infrastructure, automation, security protocols, and certified talent are far more likely to achieve strong ROI, with 63% reporting cost savings and improved service delivery. They reduce security incident costs, resolve issues faster to maintain service continuity, and deliver better outcomes including higher public satisfaction, stronger emergency response, and more efficient use of limited resources.

The window of opportunity is now. Governments that act in 2026 will establish wireless as the foundation of public service excellence for the next decade. Those that delay risk escalating costs, eroded public trust, and missed opportunities to harness AI driven transformation while peers advance with more accessible services, better emergency response, and more efficient operations.

In an environment of rising expectations for digital services, intensifying cybersecurity threats, and constrained budgets, governments that move first to resolve the wireless AI paradox will capture disproportionate advantage through operational excellence, improved satisfaction, and enhanced public safety.

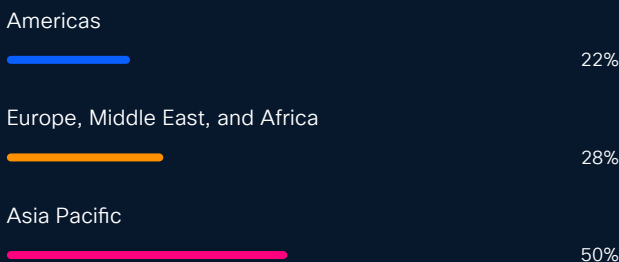
Methodology



This research comprised interviews with 6,098 organizations, including 377 in government organizations, across 30 markets. It was conducted in November 2025 by Sandpiper Research and Insights.

Research Scope

Respondent Profile: Interviews were conducted with 6,098 wireless decision makers and technical specialists in organizations with at least 250 employees. Six in 10 (61%) respondents work in organizations with annual turnover of at least US\$100 million.



Geographic Coverage: Research covered 30 markets including Australia, Brazil, Canada, Chinese Mainland, France, Germany, Hong Kong, India, Indonesia, Italy, Japan, Malaysia, Mexico, Netherlands, New Zealand, Philippines, Poland, Saudi Arabia, Singapore, South Africa, South Korea, Spain, Sweden, Switzerland, Taiwan, Thailand, United Arab Emirates, United Kingdom, United States, and Vietnam.

Industry Representation: Respondents worked across a range of industries including Business Services, Construction, Education, Engineering, Design and Architecture, Financial Services, Government and Public Services, Healthcare, Manufacturing, Media and Communications, Natural Resources, Real Estate, Restaurant Services, Retail, Technology Services, Transportation, Travel Services, and Wholesaling.

Timing: Research was conducted in November 2025.

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