



From Adoption to Accountability

How Partners Can Close AI's Value Gap



Contents

Executive Summary	3
Methodology	5
AI's Impact is Surpassing Expectations	6
Cost is Catching Up With Ambition, and Partners Can Help Customers Stay Ahead of It	10
Agentic and Edge AI: The Fastest-Moving, Least-Ready Frontier	13
AI Governance is a Customer Gap, One That Partners Can Step Into	16
Cybersecurity: Where Demand, Risk, and Opportunity All Point the Same Direction	19
Partners Face New Challenges and Opportunities in This Next Phase of AI Explosion	23
The Partner Opportunity is Broadening Into a Full-Stack Story	25
Keeping Pace: An Action Plan for AI-Forward Partners for the Next 12 Months	28

Executive Summary

The growth of Artificial Intelligence (AI) continues to transform the way work happens across businesses, and across technology stacks. In 2026, enterprises are slowly but surely making their way from experimentation to mainstreaming AI across their operations. In fact, technology research and advisory firm Gartner predicts that global AI spending will jump by 47% this year, and that enterprises will be a key contributor to that growth.

As enterprises invest more in AI, their channel partners need to keep pace. Cisco's 2025 AI Partner Study found that partners' customers increasingly recognize AI's major impact on their business goals. However, partners also identified ongoing gaps in customers' technology, operations, and talent – gaps that limit how fully they can capture AI's value. The study centered on the obstacles and opportunities involved in getting real value from AI.

For this year's AI Partner Study, we surveyed 1,702 partners across 30 countries to determine how the climate around AI has evolved since then, and the consensus was clear: partners and their customers are now focused on proving value from AI, above all else. As AI usage has become increasingly prevalent, the central question has moved from *"How do we deploy AI to get the best business results?"* to *"Is our use of AI delivering what we had hoped it would?"* The answer to that, according to our partner respondents, is mixed.

A key part of calculating return-on-investment (ROI) is cost, and this year's study shows emerging concerns around rising AI prices. In recent months, we have seen many prominent companies rein in their use of AI after over-running budgets, against a backdrop of skyrocketing token-based pricing. The result: customers and their partners are having to contend with high costs and bills, while the picture on ROI is still unclear. Our data reveals that just over one-fifth (21%) of respondents say that rising costs may actually dampen appetite for further AI investment, showing an early but serious threat to the AI ecosystem.



As usage has matured, governance has become another key area of focus. In 2025, most partners were focused on building AI tools for their customers, and in 2026, they are thinking about how to manage and govern those same tools. Many customers may now have multi-agent systems talking to each other within one operation, so the need for real-time, effective governance is at an all-time high. This area, however, remains a blind spot for both partners and their customers, as this year's Partner AI study shows.

Nowhere is this shift more visible than in Agentic AI, which has moved from an experimental idea to live deployment faster than almost anything else we track in this year's survey. Half of customers are already piloting or scaling multi-agent systems, even as the frameworks to govern them safely are only just being built.

There are reasons for optimism as well: while the journey further into AI may bring novel challenges, it is also solidifying partners' role as strategic consultants to their customers, as opposed to just being their tech suppliers.

In fact, in this constantly evolving landscape, nearly half (49%) of the partner respondents now view consultancy and advisory services as a significant opportunity, up from just 12% last year. Partners also report that customers often need either additional skill sets or headcount to scale AI projects, indicating crucial gaps in customers' talent infrastructure that they can step into.

Looking ahead, partners see AI as a strong source of revenue for themselves: 55% say that over the next 4-5 years, they expect more than half of their revenue to be attributable to AI. So, for partners who are willing to continually adapt to this AI-forward world, there is a lot of opportunity to be leveraged.

We hope this report gives them a clear picture of how AI is transforming their customers' priorities, and how they may rise to the challenge to create and prove value – not just for AI, but also for themselves.



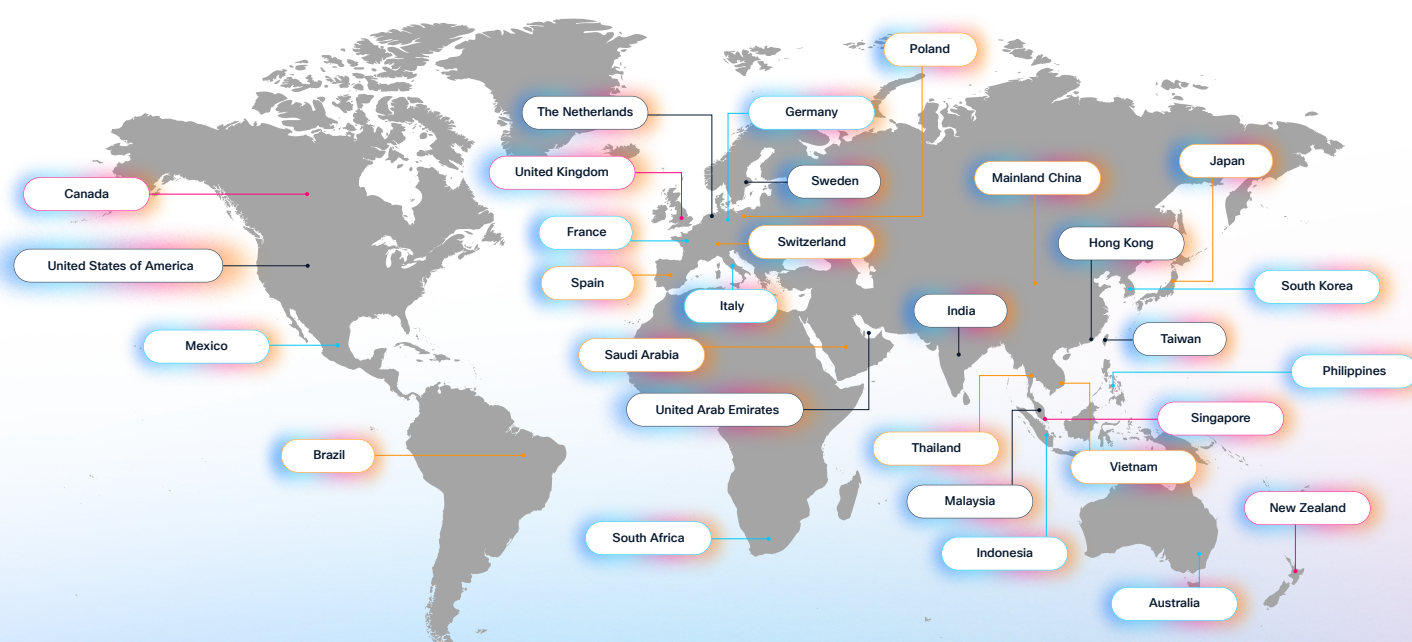
Methodology

The 2026 Cisco Global AI Partners study is based on a double-blind survey commissioned and analyzed by an independent third party, Satori Experience, of 1702 IT Partners across 30 markets and is a comprehensive assessment of the capabilities of service providers in the age of AI.



It assesses the capabilities of partners to help customers with their adoption and deployment of AI technologies, and how those abilities are evolving over time.

The survey respondents are leaders at Director level and above across a range of channel partners IT solutions providers. The respondents were screened and only those who are involved in AI integration or deployment strategy and activities for customers were surveyed for this study.





AI's Impact is Surpassing Expectations

Last year's data revealed that a majority of the partners globally (**71%**) expected AI to have a significant impact on customers' business in the year ahead, and we now know their outlook has proved true.

74% 

of the partners surveyed this year say they have seen AI transform business expectations and ambitions over the past 12 months. The Americas emerged as the most impacted region with 83% of partners from there saying AI had a significant impact, followed by EMEA at 72% and APJC at 71%.

AI's Impact on Business Competitiveness (Region Wise)

Americas

83%



EMEA

72%



APJC

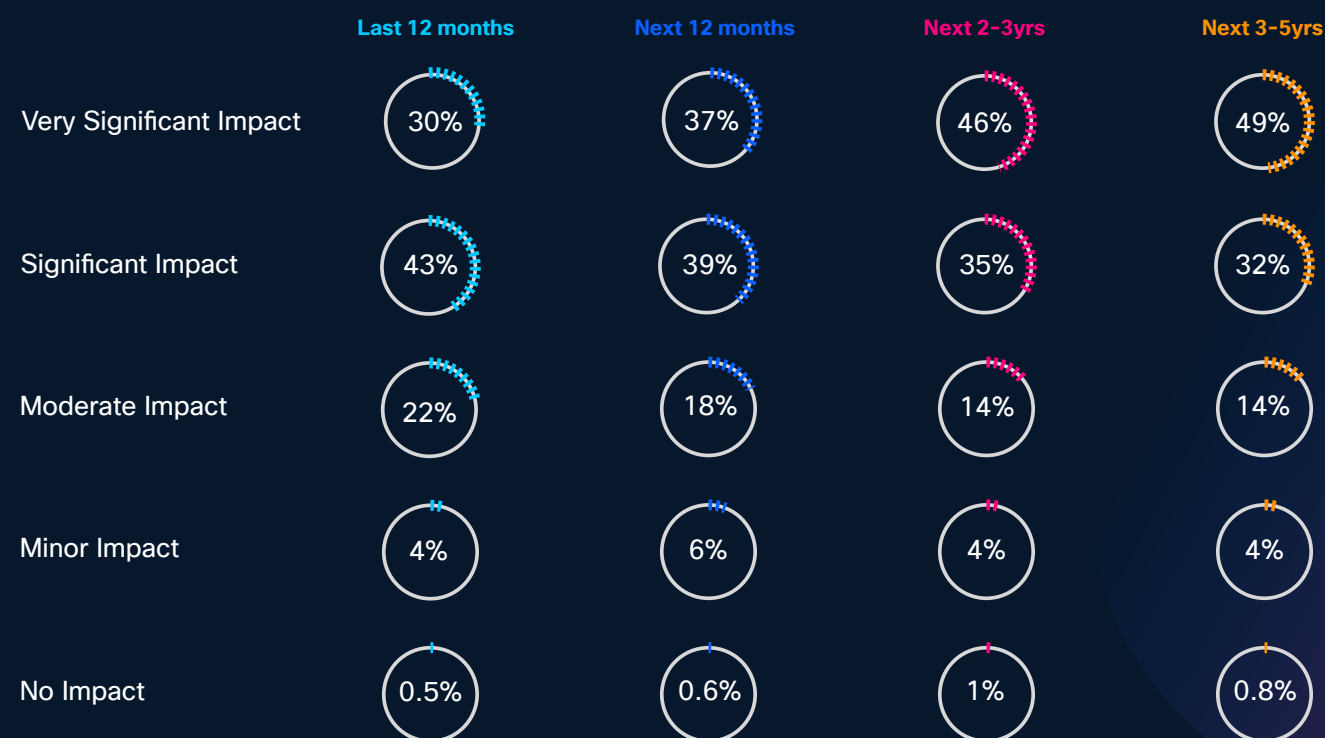
71%



The Americas are meaningfully ahead.

These already high expectations for AI's impact continue to rise. The proportion of partners that predict AI will continue to influence customers' businesses heavily over the next 12 months is now **76%**. And this is not just a short-term view. Partners also think AI will continue to impact customers over the next 2-3 years (81% this year, as compared to 78% last year) as well as over the next 3-5 years (82% this year, as compared to 79% last year).

Expected Timeline: AI's Impact on Business Competitiveness



Every horizon has risen year-on-year, partners keep underestimating impact, then revising upward.

If we dive deeper into what is informing partners' views on AI's effects, several important trends emerge. Firstly, partners are looking closely at how businesses are actually using AI to gauge impact, with efficiency and productivity being the most popular goal this year (64% this year, which is a slight dip from 67% last year, though still the clear number one outcome). All the three key regions surveyed: the Americas at 63%; Europe, Middle East & Africa (EMEA) at 63%; and Asia-Pacific, Japan and China (APJC) at 65% were nearly identically bullish on this goal.

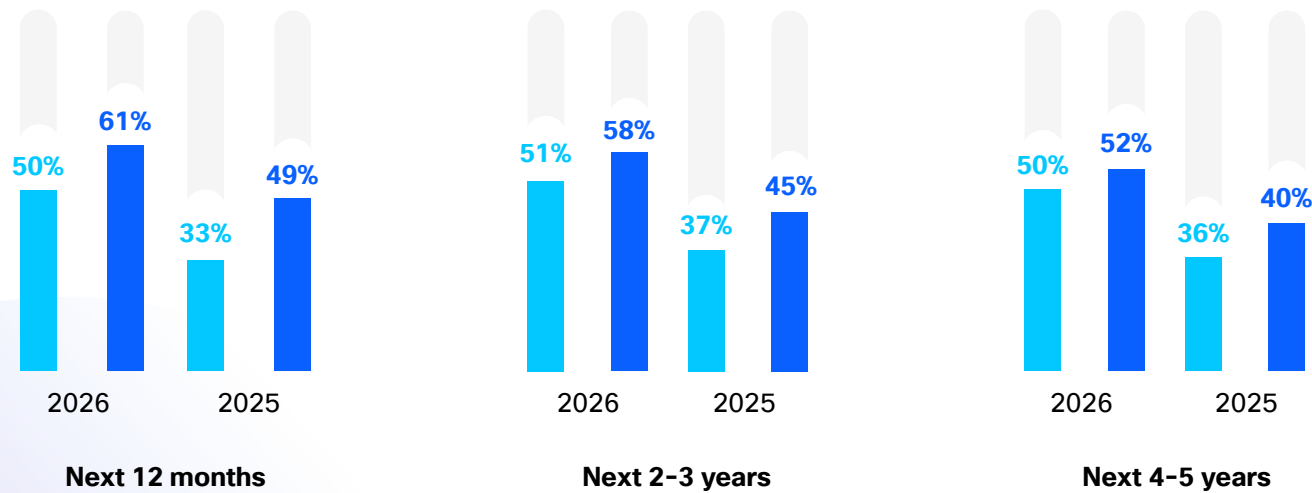
Using AI to grow revenue is the second-most popular objective, with 45% respondents choosing it as a long-term priority for their customers. This goal was most popular with Indonesian respondents who stood head-and-shoulders above their counterparts in other markets at 78% for their focus on revenue; Malaysians came in a distant second at 63%.

In terms of approaches to AI, Agentic AI is emerging as the most popular frontier for experimentation. Half of the respondents expect to increase investment in agentic over the next 12 months, and a similar number (49%) of respondents foresee doing so over the next 4-5 years. This is up from 33% and 36% last year, respectively. Data platforms for AI emerged as another key priority for respondents, with 61% saying they will be investing in them over the next 12 months, and 57% saying they would continue to do so over the next 2-3 years.



AI Investment Priorities

■ Agentic AI ■ Data Platforms



Agentic AI holds steady across all horizons; Data Platforms is strong now but cools at longer horizons.

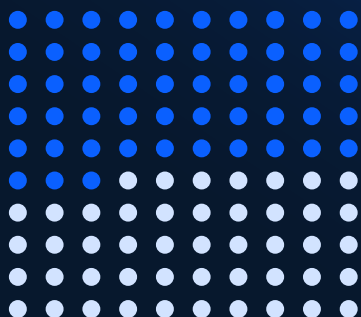
These data points paint a picture of aggressive commitment towards AI investment and experimentation, with a variety of use cases and approaches emerging. But as AI practices mature, the key question users are beginning to ask themselves is: are we seeing any ROI from AI?

Channel partners say the answer to that is mixed: 43% report that their customers are seeing ROI that meets or exceeds their expectations, while 38% say it is below expectations, or at risk – only a five percentage-point difference.

Customer ROI For AI Investments

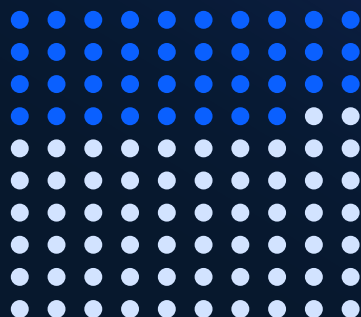
43%

Meeting/Exceeding Expectations



38%

Below Expectations/At Risk



This is essentially a coin flip - the gap between the two outcomes is only 5 points.

As AI continues to become an integral part of business operations globally, getting a clear picture on ROI is an issue. Partners and their customers will need to examine more deeply to justify the enthusiasm and investment that the numbers reveal.





Cost is Catching Up With Ambition, and Partners Can Help Customers Stay Ahead of It

The conversation around ROI confirms that AI is no longer seen as purely novel or experimentative, but as a serious item on most customers' ledgers. A major determinant of any technology's ROI is, of course, its cost and that has justifiably become a critical part of discussions around AI.

In 2026, there have been many headlines revealing that businesses going all-in on AI have had to pull back the reins due to rising costs. The end of tokenmaxxing has been heralded, and budgets have been slashed to focus more on specific use-cases in place of general experimentation. Our data details this picture further:

48% 

of partners say that over the past six months, several of their customers have already flagged concerns that AI costs are exceeding initial projections.

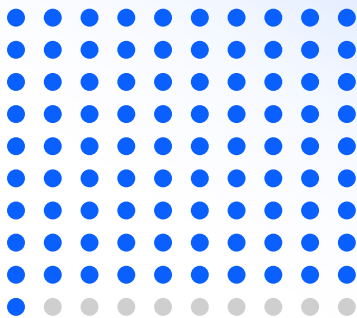
35% 

of partners whose project costs have already overtaken estimates, say customer budgets are being exhausted or revised urgently.

Customer Concerns About AI Running Costs

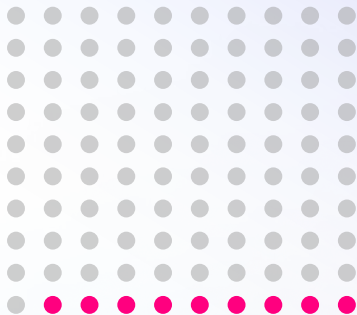
91%

Concerns Raised



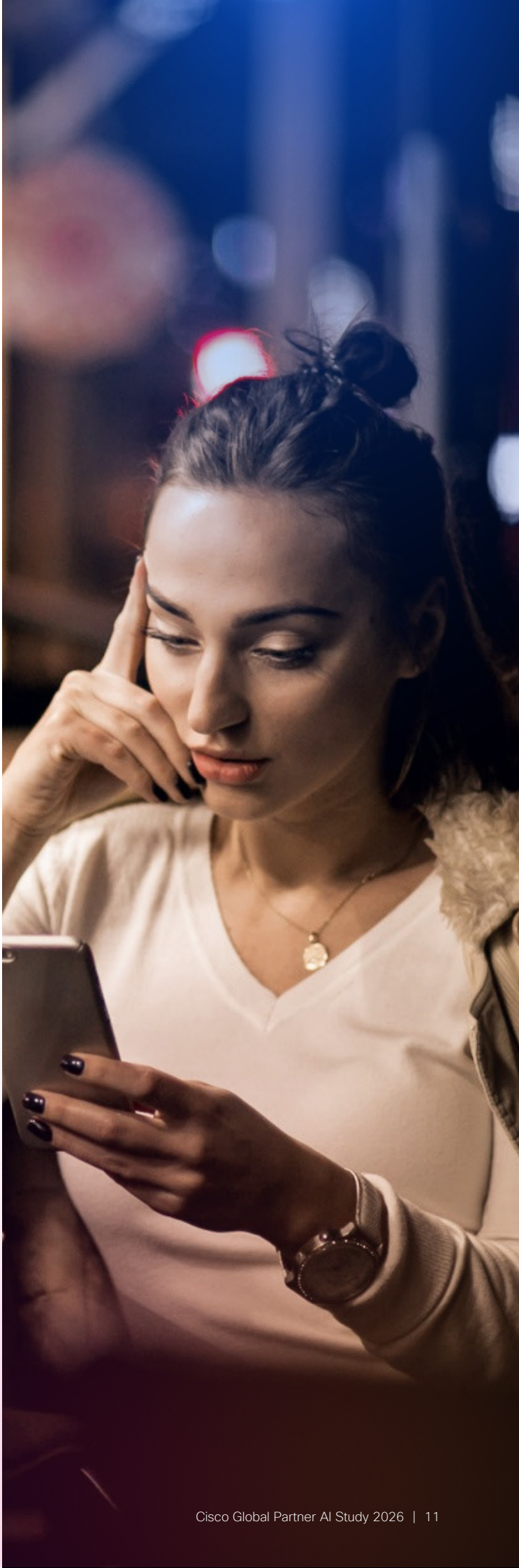
9%

No Concerns Raised



91% partners have seen at least some customers raise cost concerns - this is now a mainstream issue, not an edge case.

Discipline around cost, thus, has now become a key component of AI investment. To save on costs, partners say that customers are now switching to cheaper, open-source alternatives (52%), scaling back usage or user access (50%) or delaying planned AI rollouts (45%).



Customer Responses When AI Costs Exceed



These are the concrete actions customers are already taking - not hypothetical risk.

In the face of rising costs, partners and their customers are feeling the pressure to show continual upward returns. Just over one-fifth of the respondents (21%) said that cost pressures are significantly dampening, or dampening, their appetite to invest in AI. This sentiment is highest in the Americas at 20%, followed by EMEA at 17%. This highlights an early but significant threat to AI investment, and to partners’ future revenue streams.

Today, 58% of partners say that they get anywhere from 26-100% of their revenue from AI, with only 8% of that bucket attributing between 76-100% of their revenue to AI. Over the next 5 years, partners expect AI’s share of their revenue pie to widen: 81% say they will expect AI to contribute more than 26% of their revenue, with those choosing the 76-100% bucket increasing to 28%.

The good news is that partners are recognizing that their own economics are tied up in AI economics, and they are developing skills to help their customers manage rising costs. An astounding 98% of partners say they have developed at least partial capabilities to estimate AI consumption costs, with most of these respondents (58%) saying these capabilities are comprehensive in nature.

Only 2% of respondents said they have no such capabilities, citing the lack of internal tools/methodologies, access to usage data, and interest from customers as the top three blockers.

Additionally, nearly half (49.2%) of partners see consulting/advisory services as their leading growth opportunity, a jump from 12% last year, demonstrating an opportunity to guide customers on strategic, value-based uses of AI that will keep appetite healthy and costs low. These shifts in partners’ capabilities are moving them away from the traditional model of tech supplier to strategic partners for their customers.



Agentic and Edge AI: The Fastest-Moving, Least-Ready Frontier

Agentic AI has moved from an experimental idea to live deployment faster than almost anything else we cover this year. Customer adoption is already reaching meaningful scale: partners report that nearly half (49%) of customers are now piloting or actively scaling Agentic AI, with enthusiasm almost equally distributed across the Americas, EMEA and APJC.



Customers' Agentic AI Journey

Partners also report that Cloud computing, Cybersecurity and Digital transformation are the three functions customers most commonly target with Agentic AI. This year's study also introduced an entirely new capability framework to keep pace with this evolution. Agentic architecture design, multi-agent orchestration, tool and API integration, human-in-the-loop design, and agentic system evaluation and containment are being assessed for the first time this year precisely because customer deployments have moved fast enough to demand it.

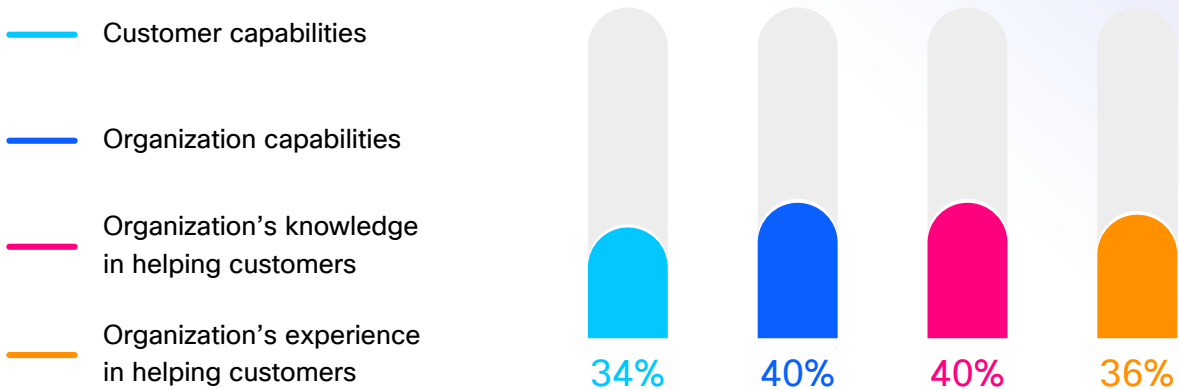


Agentic AI: Top targeted areas by customers according to partners.

We asked about these capabilities from four different angles: how ready customers themselves are, how well partners can help, how much partners know, and how much hands-on experience partners actually have. Of the five new capabilities assessed, multi-agent orchestration stands out as the clearest weak point. Only 34% of partners rate their customers' capability here as high, and only 40% rate their own capability to help as high and only 40% rate their own capability to help as high. In terms of knowledge and experience, only 40% rate their own as high, and just 36% rate their hands-on experience as high, the lowest score of any agentic measure, on any lens. As customers move from single-agent pilots to systems where multiple agents hand off tasks to one another, this is the area partners will need to pay the most attention to.



Multi-agent Orchestration Capability



This is the clear weak point - lowest score on every single lens measured, on any agentic capability.

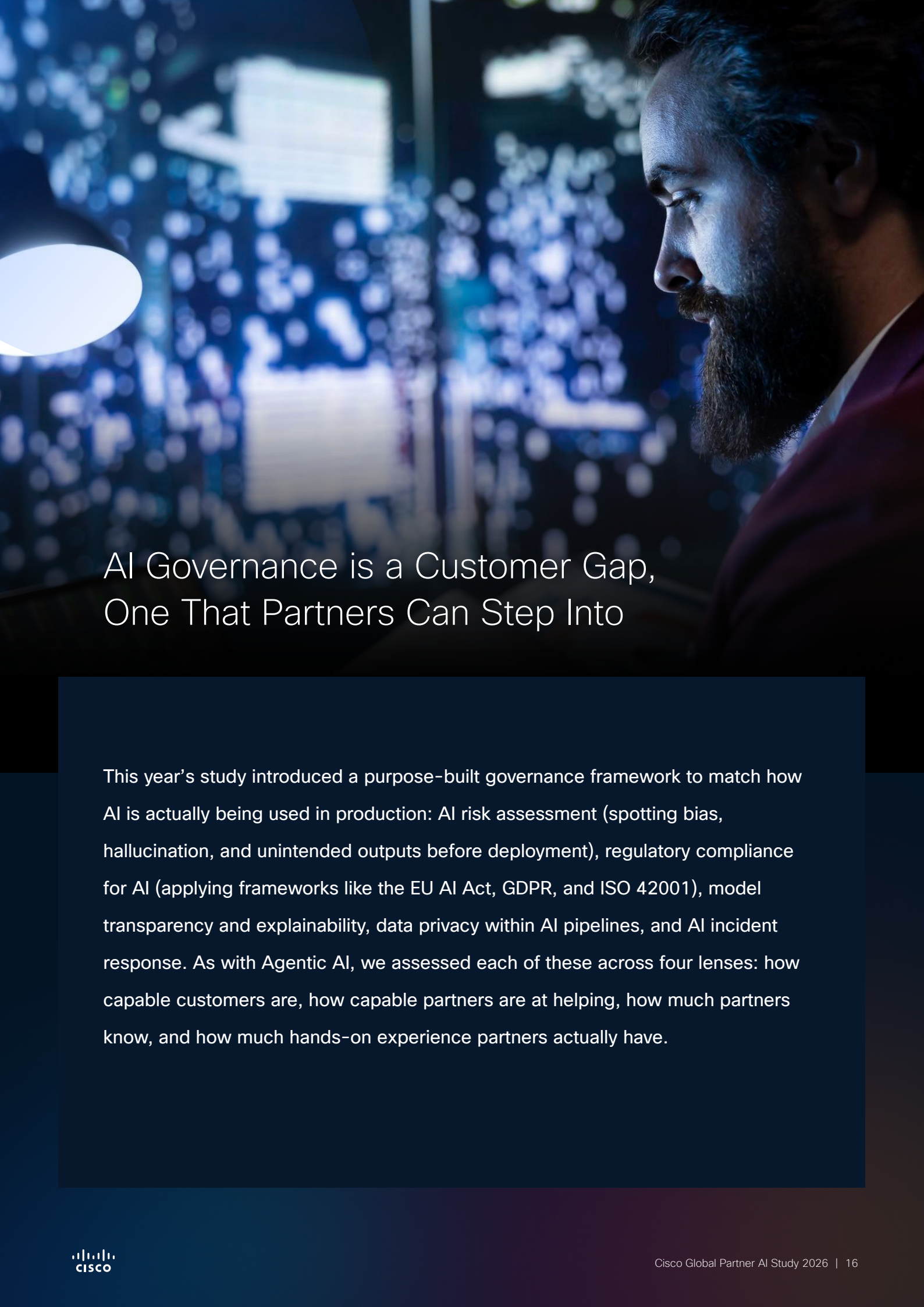
Edge AI is moving in close step with Agentic AI, not behind it. According to partners, nearly half of their customers (**48%**) are already piloting or scaling edge AI deployments, almost matching Agentic AI's own pace. Partners, however, aren't there yet. Only 21% say edge deployment is now a standard, core part of their AI work. Another 38% say they can deploy AI models to some edge devices, but not all, and 34% say they have only experimented with edge deployments. This shows that customer demand for edge AI is outrunning partner readiness to deliver it.

Edge AI Deployment Readiness



Only about 1 in 5 partners have this as a standard, mature capability - customer demand is outrunning partner readiness.

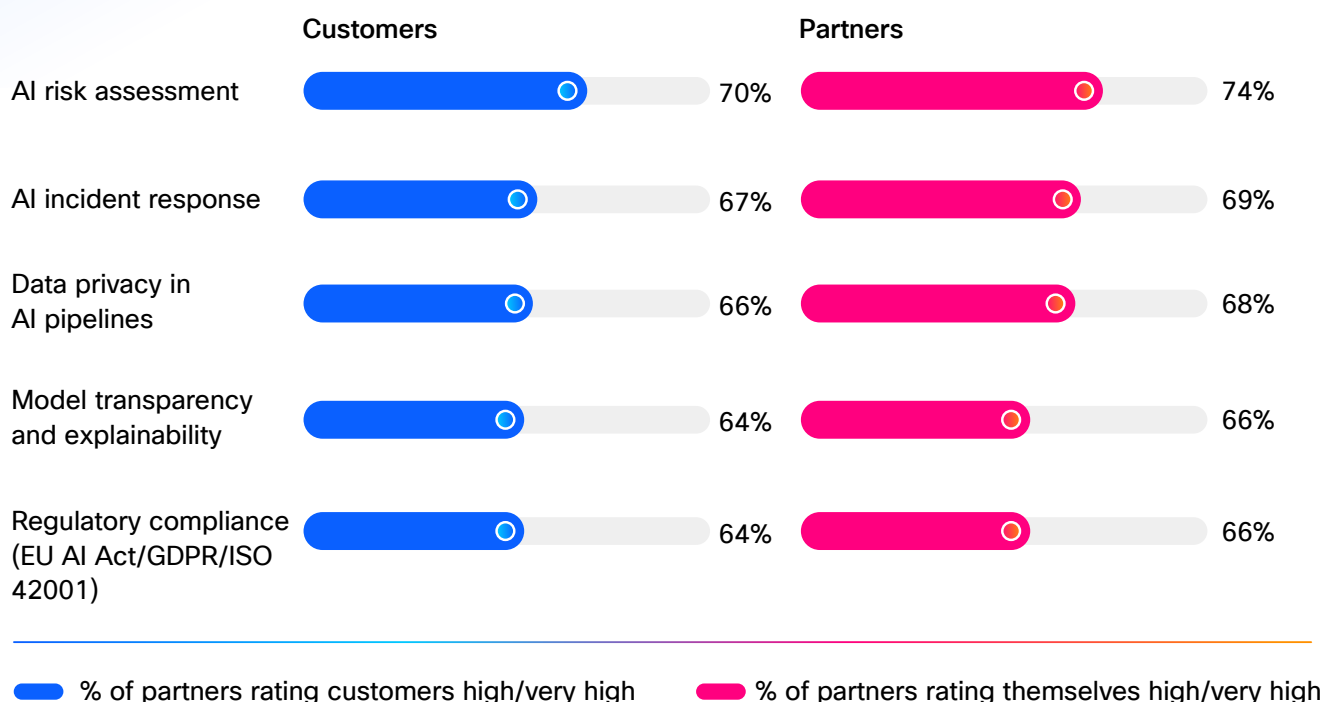
As both agentic and edge AI move into production, they raise the same underlying question as the rest of this report: who is managing and securing all of this once it's live? That's where governance comes in.

A man with a beard is shown in profile, looking intently at a screen. The background is a server room with many racks of equipment and glowing lights, creating a bokeh effect. The lighting is dim, with a bright light source on the left side of the frame.

AI Governance is a Customer Gap, One That Partners Can Step Into

This year's study introduced a purpose-built governance framework to match how AI is actually being used in production: AI risk assessment (spotting bias, hallucination, and unintended outputs before deployment), regulatory compliance for AI (applying frameworks like the EU AI Act, GDPR, and ISO 42001), model transparency and explainability, data privacy within AI pipelines, and AI incident response. As with Agentic AI, we assessed each of these across four lenses: how capable customers are, how capable partners are at helping, how much partners know, and how much hands-on experience partners actually have.

AI Governance Capabilities Across Key Areas



Risk assessment is clearly strongest (70-76%) everywhere; transparency and compliance are clearly weakest (mid-60s) everywhere.

Across all four lenses, one pattern repeats consistently. AI risk assessment leads everywhere, rated high or better by 70–76% of respondents, whichever lens you look through. On the other hand, model transparency and explainability, and regulatory compliance for AI, consistently lag, each landing in the mid-60s across customer capability, partner capability, partner knowledge, and partner experience alike. In other words, the industry is better at spotting AI’s risks than it is at explaining AI’s decisions or proving compliance with the regulations now governing it. This is a real opportunity for partners who can help customers close that specific gap.

That gap also shows up in how partners describe their customers' skills gaps. In 2025, partners said the biggest skill gap they saw in customers was a lack of skill in creating AI technologies and tools (43%). This year, however, just 21% of partners rank it as a top concern, roughly half the 2025 share.

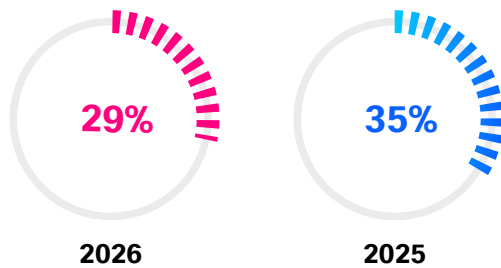
Instead, partners now rank cybersecurity (32%) and data management/analytics (30%) as customers' top talent gaps, ahead of AI tools. The focus, in other words, has moved from "Can we build AI?" to "Can we manage, monitor and secure it?". This is exactly the territory the governance framework above is designed to cover.

Security is one of the clearest examples of this gap in practice. Only 29% of partners said they had high levels of awareness around security and governance around AI-specific threats, down from 35% last year. The proportion of respondents who said they had “limited” awareness rose, however, to 31%, a rare case of a confidence metric moving backward even as the rest of this report shows partners growing more capable, not less.

This gap is especially exposed given where Agentic AI now stands.

Organization's Awareness on Cybersecurity Threats

High Awareness of AI-specific security threats



As noted above, roughly half of customers are already piloting or scaling multi-agent systems in production, at precisely the moment partners' own confidence in AI-specific security threats is falling. Autonomous systems are moving faster than the defenses meant to contain them. This arguably makes AI security the single highest-priority skill gap partners can close this year.

Fortunately, partners recognize that this is a growth lever for them: 33% chose AI security as an area for future investment for themselves, up significantly from only 3%. This shows that while partners might still be upskilling themselves, they are aligned on the direction of travel on what they need to offer to maintain and cement their partnership with AI-focused customers. The next chapter explains exactly why.

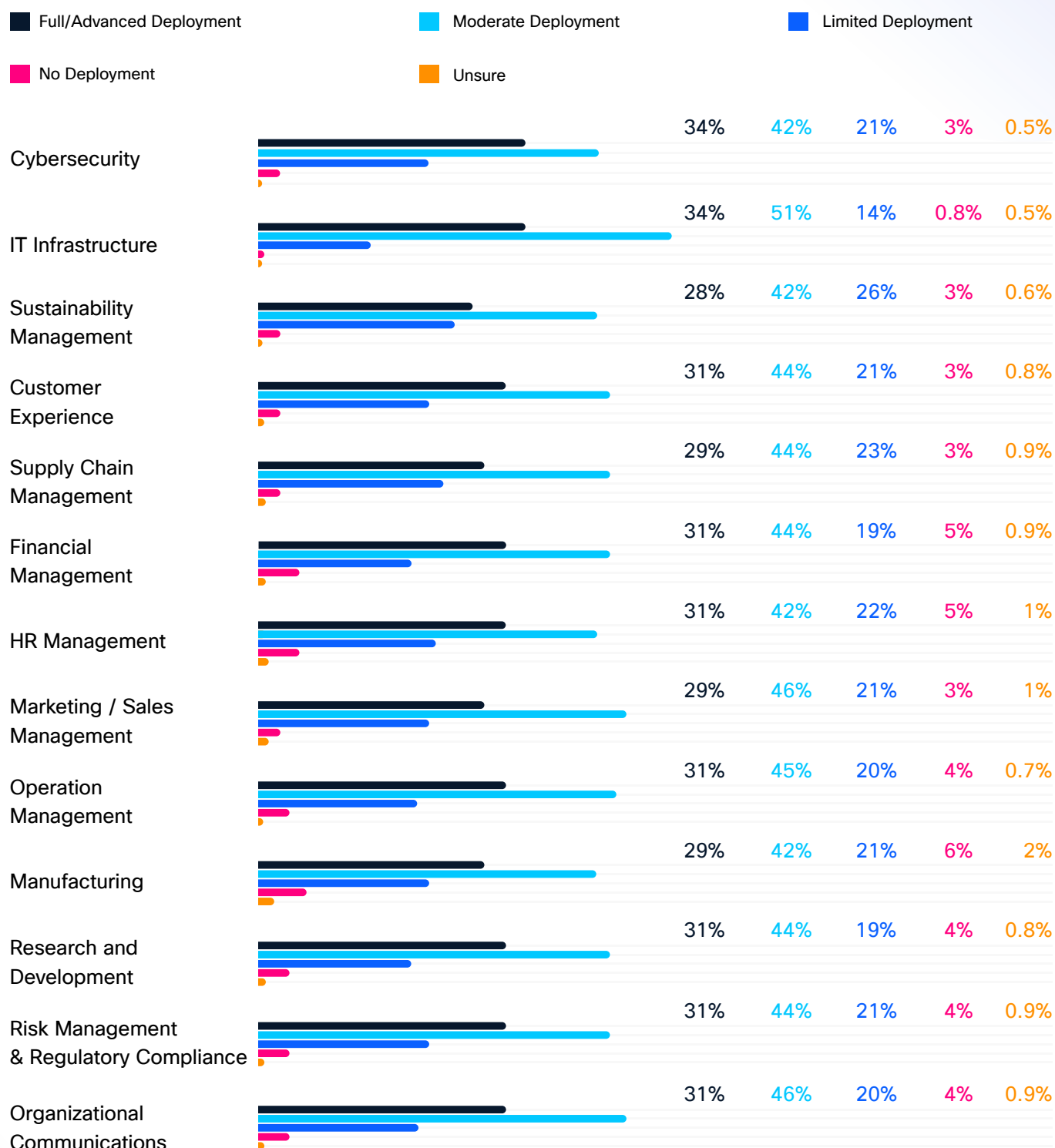




Cybersecurity: Where Demand, Risk, and Opportunity All Point the Same Direction

Cybersecurity isn't an emerging AI use case anymore. It is the most mature one. Of the thirteen business functions we asked partners about, cybersecurity has the highest share of customers already at full or advanced AI deployment (34%) alongside IT infrastructure itself (34%), and clearly ahead of every other function, which cluster between 28% and 31%.

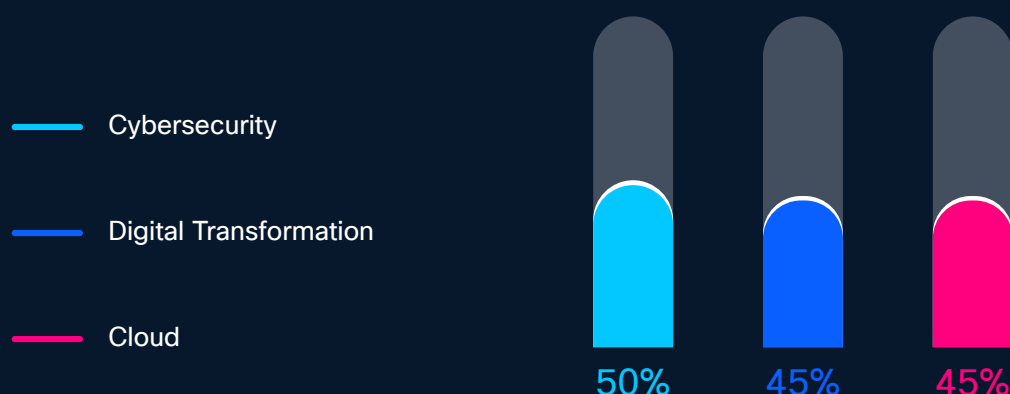
Deployment Maturity across Business Functions



Cybersecurity is the single most mature AI deployment area of any business function tracked.

This is only going to grow further as cybersecurity is the area partners say their customers are most commonly targeting for AI budget deployment (50%), ahead of digital transformation (45%) and cloud computing (45%).

Areas where Customers Prioritize AI Budgets



Cybersecurity is customers' #1 target for AI budget - ahead of both other categories.

It's also the second most-targeted function for Agentic AI specifically (51%), just behind cloud computing. As AI gets more autonomous, protecting it isn't an afterthought, it's one of the first places customers want it applied.

But partner confidence hasn't kept pace with that demand, and on one measure, it's moving in the wrong direction entirely. Only 29% of partners report high awareness of AI-specific cybersecurity threats, down from 35% just a year ago. It is the only confidence metric in this entire study to fall rather than rise.

Capability to detect tampering or adversarial attacks tells a similar story: only 39% of partners rate their own capability on AI models as high, and 42% on AI agents. This means a majority of partners are only moderate or below on the very thing customers are increasingly asking them to help secure.

This shows up as customers' single biggest AI talent gap as well. Cybersecurity ranks above data and analytics, and well above basic AI tooling skills, when partners are asked where their customers fall shortest. It isn't only a customer problem, either: security and compliance is partners' own second-largest internal skills gap (60%), trailing only data management (62%).

As Agentic AI moves into live deployments, a newer and more specific version of this gap has emerged. Nearly half of partners (49%) cite a lack of security and observability for agentic systems, spanning hallucination risk, keeping autonomous systems within their intended boundaries, and maintaining compliance, as one of the biggest challenges their customers face. Edge AI carries its own version of the same problem: 60% of partners cite physical and embedded security vulnerabilities, devices open to tampering, malware, or data exfiltration, as a real barrier to deploying at scale.

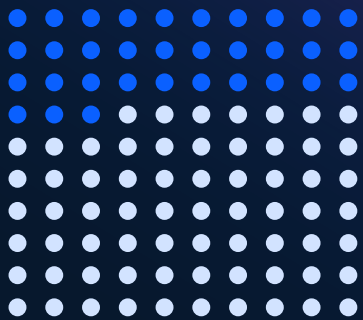
Partners have noticed, and they are moving faster here than anywhere else in this study. AI security and risk mitigation has gone from a niche offering to a mainstream one faster than any other growth category we track: just 3% of partners named it as a leading growth opportunity last year; this year, that figure is 33%, more than a ten-fold increase in twelve months.



AI security as a Growth-Investment Priority

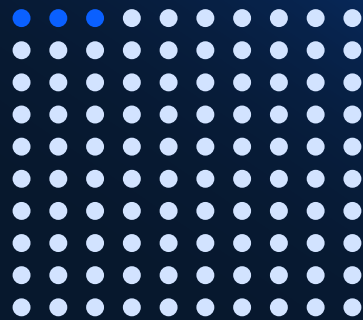
AI Security and risk mitigation offerings

33%



2026

3%



2025

More than a 10x jump in one year - the sharpest growth-opportunity increase in the entire study.

That's not a coincidence. It is customers signalling, consistently and loudly across nearly every question we asked, that security is where they want help with AI the most, and partners are responding.

If there's one area in this entire study where demand, risk, and partner opportunity all point in exactly the same direction, it's this one.

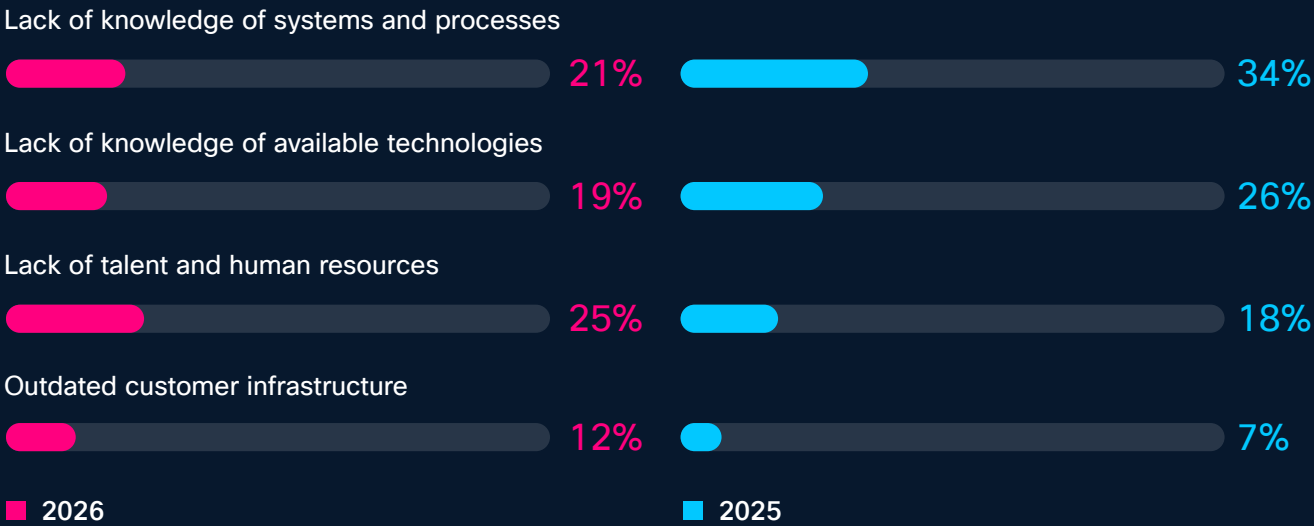


Partners Face New Challenges and Opportunities in This Next Phase of AI Explosion

The landscape of AI is dynamic as businesses' use of it matures, it brings novel challenges and threats, but also opportunities, to the fore. Governance, as we discussed above, is obviously one of the most significant ones, but our data reveals a few more key trends emerging over time.

Firstly, the survey revealed that partners are rising to challenges as they meet them in this constantly evolving AI terrain. Last year, lack of knowledge around AI systems and processes was one of the top skill gaps for partners at 34%. This year, that has dropped to just 21%, the most dramatic shift of all. In addition, the concerns around lack of knowledge of available tech also dropped by 7 percentage points, from 26% to 19%.

Key Barriers to Supporting Customers' AI Adoption



Two barriers are shrinking fast (knowledge gaps); two are growing (execution experience, outdated infrastructure) - the story is a shift in the type of barrier, not just a reduction overall.

This indicates that the partner ecosystem has largely cleared the initial hurdle of conceptual understanding and is now grappling with the technical realities of scale. The data supports that: there was a 7-percentage point increase in partners citing "lack of experience in new areas of technology deployment" as their primary barrier, shooting up to 25%. This suggests that as projects move from theoretical pilots to live environments, the uncharted territories of execution are now the dominant hurdle.

These highlight additional areas that partners can upskill themselves in over the coming year, similar to their evolution and skill-building from 2025. The survey also shows that many partners (45%) expect their customers to increase headcount by between 26-50% as they scale AI deployments. This highlights a major skills and talent gap that AI-forward partners have the opportunity to step into. This opportunity was the strongest in APJC overall (48%), with Vietnam (65%), Hong Kong (62%) and the Philippines (61%) emerging as the clear forerunners.

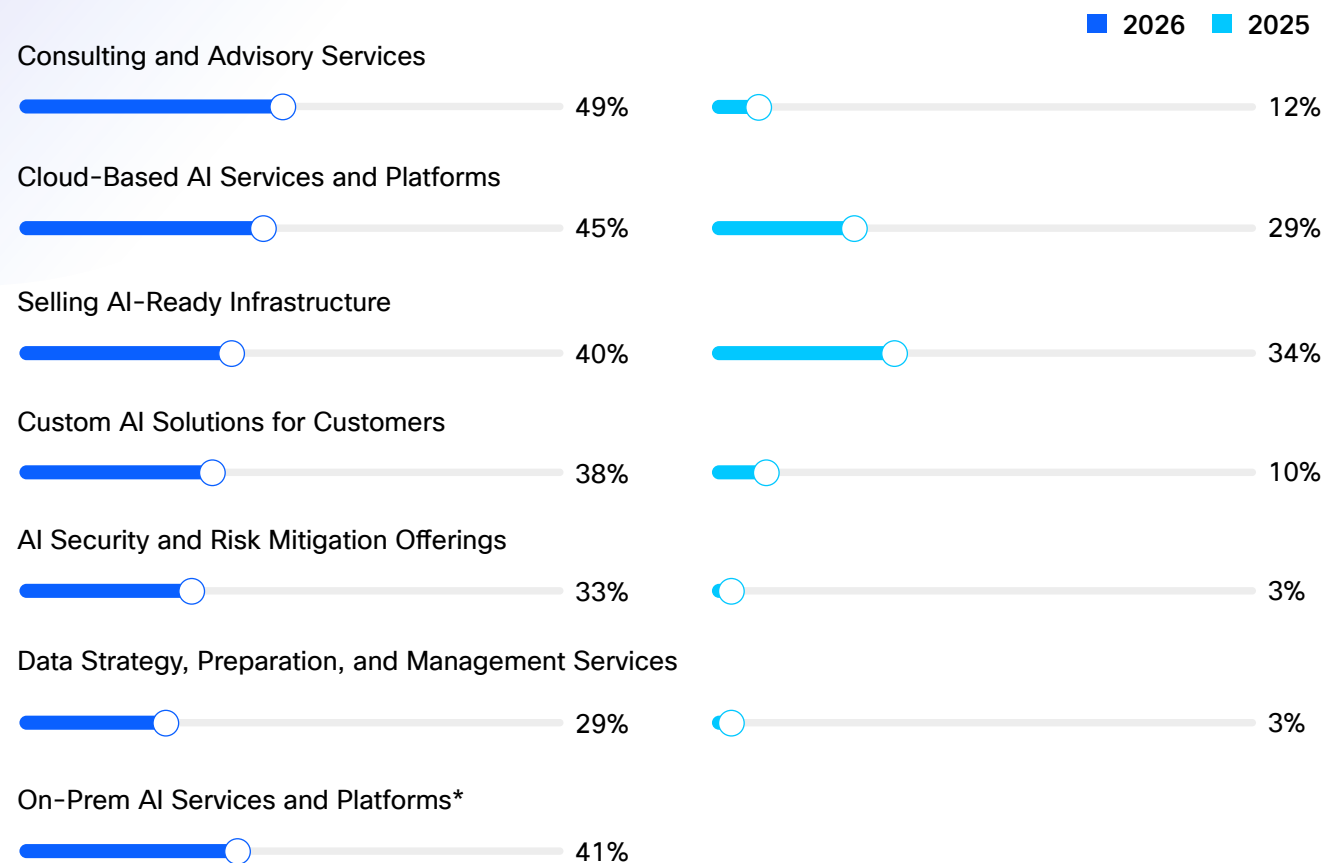
Additionally, the number of respondents who chose "outdated customer infrastructure" nearly doubled as a primary concern, rising from 7% to 12%, showing that legacy systems are failing to meet the computational demands of 2026 AI workloads. This is likely why "on-prem AI services" made a dramatic debut on partners' list of key growth areas, with 41% choosing it this year. This reflects the market's increasing focus on resilience and data sovereignty alongside the push for cloud-based solutions.



The Partner Opportunity is Broadening Into a Full-Stack Story

Despite the new pressures around cost and governance, this year's data tells an unambiguously optimistic story about where partners can grow. Consulting and advisory services have emerged as the single largest growth opportunity overall, chosen by 49% of partners, comfortably ahead of cloud-based AI services and platforms (45%), on-premises AI services (41%), and selling AI-ready infrastructure (40%). Just twelve months ago, consulting and advisory sat at only 12%.

Biggest Growth Opportunities in Helping Customers Deploy AI



*New data point added in 2026

Every single category grew year-on-year, showing that opportunities are growing across every area of AI deployment.

The shift reflects partners moving from being infrastructure suppliers to being trusted advisors on strategy, use-case selection, and ROI.

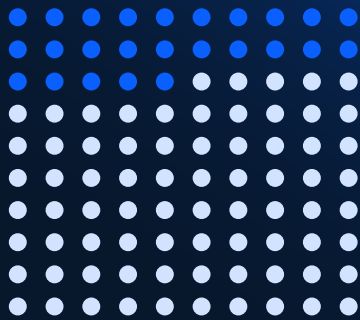
Notably, this growth is not concentrated in one or two categories. Every growth opportunity we measured rose year-on-year, including AI security and risk mitigation (up from 3% to 33%), custom AI solution design (up from 10% to 38%), and data strategy and management services (up from 3% to 29%).

On-premises AI services, an entirely new category this year, has already climbed to third place overall (41%), just ahead of traditional infrastructure sales, reflecting real customer demand for resilience and data sovereignty alongside cloud deployments.

This diversification is translating directly into revenue. Partners expecting more than half of their revenue to come from AI within the next 3–5 years has climbed to 55%, up from roughly a quarter (25%) who say AI already makes up that share of their business today. AI-as-a-Service (AlaaS) offerings, meanwhile, are now close to universal: 90% of partners already offer or plan to offer AlaaS within the next 12 months suggesting it has become table stakes rather than a differentiator.

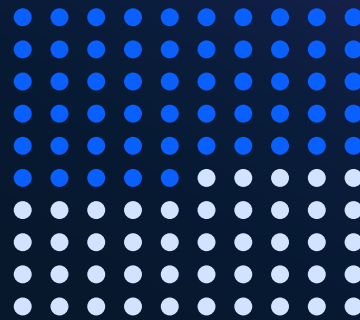
Future Revenue from AI Deployments

25%



Today

55%



Next 3-5 years

AI revenue share is set to more than double for partners already leaning in.



Keeping Pace: An Action Plan for AI-Forward Partners for the Next 12 Months

The report tells us a story of potential optimism and growth: partners who can move beyond simply deploying AI, who can prove its ROI, manage its cost, and govern it responsibly, stand to capture a disproportionate share of a genuinely expanding opportunity. We have already seen partners grow in their skills and remit from 2025 to 2026, and to do the same for the coming 12 months, partners should focus on the following areas.

The services surge

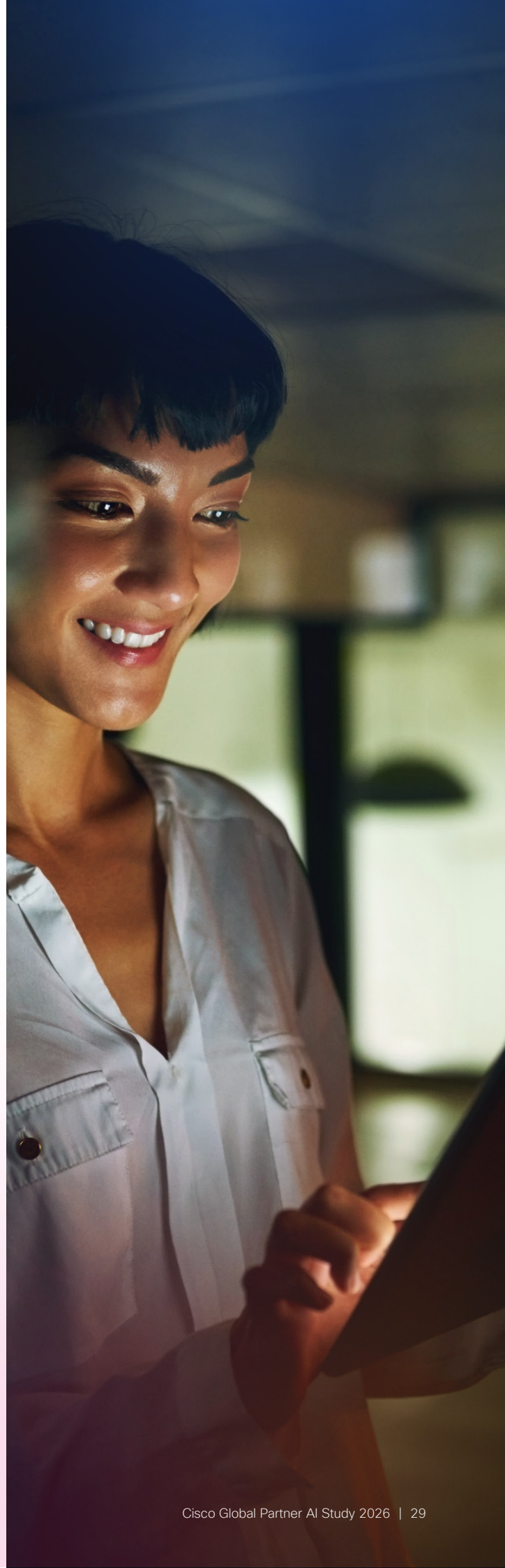
Given the dynamic nature of AI, the challenges and opportunities that come with it keep changing from year to year. Partners who can see around corners and equip themselves with the right skills and approaches have the chance to be critical collaborators with their customers, moving from technology architects and vendors to consultants offering strategic counsel and advisory services. Their starting point here should be supporting customers on proving ROI via use case identification and cost discipline.

Customization vs. off-the-shelf

Custom AI solution design saw a huge jump as a priority for the coming year: from 10% to 38%. This goes hand-in-hand with the consulting opportunity mentioned above as well as partners' concerns around customer infrastructure not being AI-ready. Together, these indicate that standardized, one-size-fits-all AI approaches and tools are no longer sufficient for enterprise needs, creating a massive opportunity for developers and integrators.

Cracking data security and governance

As mentioned before, AI concerns in 2026 are less about execution and more to do with everything that comes after a deployment is live: this includes governance and security. The data shows that growth opportunities in AI security and risk mitigation exploded from a niche concern to a core priority for one-third of all partners. This validates the narrative that security is now a non-negotiable part of the AI stack.





Cloud and on-prem growth, hand-in-hand

Last year, on-prem was nowhere on the priority list for partners. This year, it is the third-highest growth area, underscoring a trend toward industrial and local AI deployment. This can be a huge opportunity alongside cloud deployments for partners. Nearly 55% of partners expect this to be a significant chunk (anywhere between 26-75% of their revenue) over the next 12 months, while the number for cloud projects is similar (56%).

Building on solid ground

None of this is possible on shaky infrastructure. Partners themselves flag outdated customer infrastructure as a fast-growing barrier with the share citing it nearly doubled this year. As AI workloads scale, compute, networking, and data-platform demands scale with growing AI deployments, partners will increasingly need to pair their own consulting and integration strengths with best-in-class underlying platforms built to handle AI at production scale. The partners who choose the right infrastructure and platform partners to build on, rather than trying to stitch together AI capability from scratch, will be the ones able to deliver on everything the other four points above promise.

**Americas Headquarters**

Cisco Systems, Inc.
San Jose, CA

Asia Pacific Headquarters

Cisco Systems (USA) Pte. Ltd.
Singapore

Europe Headquarters

Cisco Systems International BV Amsterdam
The Netherlands

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