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WireScreen Briefing: Global Router Intelligence

FCC DA-26-278 · March 23, 2026

REGULATORY ALERT — FCC COVERED LIST UPDATE

FCC PUBLIC NOTICE — DA 26-278 · MARCH 23, 2026

Breaking: The FCC's Public Safety and Homeland Security Bureau has issued an immediate expansion of the Covered List under the Secure Networks Act, prohibiting FCC equipment authorizations for all routers produced in foreign countries. Citing persistent cyber threats from state and non-state actors — including the Volt, Flax, and Salt Typhoon campaigns that targeted US communications, energy, transportation, and water infrastructure — the Commission determined that foreign-produced routers create unacceptable supply chain and cybersecurity risks to American homes, businesses, and critical infrastructure. **Scope:** Consumer-grade residential routers only — enterprise equipment is not covered. **Production is defined broadly** to include manufacturing, assembly, design, and development: a router designed in China but assembled elsewhere remains covered. All affected producers may apply for a Conditional Approval from the Dept. of War or DHS to continue receiving FCC authorization during a transition period.

CHINA MFG. SHARE	US INTERNET USERS	TP-LINK US SHARE	COVERED LIST ENTRIES	MAX WAIVER PERIOD
75%	**96%**	**65%**	**13**	**18mo**
of US consumer routers made in China	rely on routers for access (Pew, 2025)	of consumer retail segment	FCC-banned entities or categories	Conditional Approval limit

MARKET STRUCTURE & REGULATORY IMPACT

TOP GLOBAL ROUTER MAKERS

COMPANY	HQ / MFG.	DEVICE STATUS	US SHARE
TP-Link Shenzhen, China	China / China mfg.	Devices covered	~65%
Cisco / Linksys San Jose, US	US HQ / TW & Asia mfg.	Devices covered	~12%
ASUS Taipei, Taiwan	Taiwan HQ / China mfg.	Devices covered	~7%
Netgear San Jose, US	US HQ / Asia mfg.	Devices covered	~5%
Eero (Amazon) San Francisco, US	US HQ / China mfg.	Devices covered	~4%
Sagemcom Paris, France — Spectrum OEM	France HQ / Asia mfg.	Devices covered	ISP-prov.
Ubee / CommScope Horsham, US — ISP OEM	US HQ / Asia mfg.	Devices covered	ISP-prov.
Huawei Shenzhen, China	China / China mfg.	Entity banned	~0% US
ZTE Shenzhen, China	China / China mfg.	Entity banned	~0% US

WIRESCREEN INTELLIGENCE

The DA-26-278 ruling covers devices by *place of production*, not by company name — so Cisco, Netgear, ASUS, and others are not named on the Covered List, but their foreign-manufactured devices are covered. Huawei and ZTE are different: they are banned as named entities (since 2021) regardless of where their products are made. Enterprise routers are outside this ruling's scope. TP-Link additionally faces an active DOJ criminal antitrust probe (Reuters, April 2025).

WireScreen monitors this sector through real-time Chinese corporate registry filings, beneficial ownership tracing across 100+ risk flags — PRC state ties, military-civil fusion, CCP committee embeds — and subsidiary & JV network graphing that surfaces relationships standard databases miss.

CONDITIONAL APPROVAL — KEY REQUIREMENTS (FCC DA-26-278, ANNEX A)

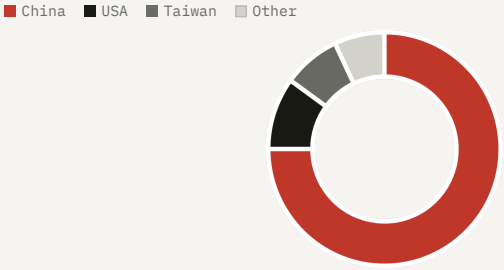
Ownership disclosure: Full corporate structure, all beneficial owners at 5%+ equity, board member nationalities and country of residence, any foreign govt. influence or financing.

Supply chain BOM: Country of origin for every component, firmware, and software — including who owns the IP and controls software updates.

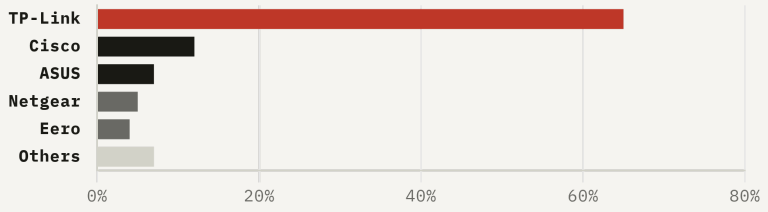
US onshoring plan: Time-bound plan with quarterly reporting to DoW/DHS. Waivers last up to 18 months maximum.

Misrepresentation: Applicants that knowingly misrepresent information will have their Conditional Approval terminated and be permanently barred from reapplying.

MANUFACTURING GEOGRAPHY — GLOBAL ROUTER PRODUCTION



US CONSUMER MARKET SHARE BY BRAND



REGULATORY & THREAT TIMELINE

Mar 2021	**Huawei & ZTE banned** — first additions to FCC Covered List under Secure Networks Act
Sep 2024	**Volt & Salt Typhoon** — PRC state botnet exploits foreign routers to attack US critical infrastructure
Oct 2024	**Microsoft Storm-0940** — PRC actors use compromised routers in password spray attacks on defense & govt
Dec 2024	**WSJ: US weighs TP-Link ban** — White House national security review begins
Apr 2025	**DOJ criminal probe** — antitrust investigation into TP-Link confirmed (Reuters)
Dec 2025	**UAS Covered List expansion** — foreign drones added; broader supply-chain crackdown signals
Mar 23, 2026	**All foreign routers — Covered List.** FCC DA-26-278: all routers produced abroad prohibited from FCC authorization absent DoW/DHS Conditional Approval

IMPACT: COMPANIES & THE US RETAIL MARKET

1 TP-Link faces existential US market risk

Controls ~65% of US consumer routers. Without Conditional Approval, TP-Link cannot sell new routers in the US. Must prove supply chain independence from PRC control and commit to US manufacturing — a significant challenge given its Shenzhen HQ and active DOJ criminal probe.

2 ~75% of US retail shelves face supply shock

Three-quarters of US consumer routers are China-manufactured. Without rapid Conditional Approvals, a supply crisis emerges. Prices likely spike 30–60% as brands race to qualify and consumers rush existing certified stock.

3 ISP-provisioned routers face the same wall

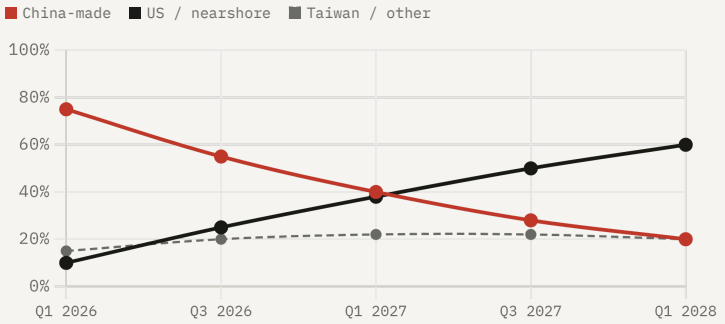
Spectrum, Comcast, and other major ISPs provision millions of routers from Sagemcom, Ubee, Technicolor, and Arris — all manufactured in Asia. ISPs face their own Conditional Approval scramble or must halt new router deployments.

4 Reshoring is the only long-term path

No major consumer brand currently manufactures routers in the US. The ruling creates opportunity for domestic startups and brands that relocate production to the US — but building that capacity from scratch will take years, not months.

US MARKET PRODUCTION SHIFT FORECAST ILLUSTRATIVE SCENARIO

This chart illustrates the directional pressure the ruling creates if Conditional Approvals drive onshoring. Actual pace will depend on waiver outcomes, manufacturing investment and enforcement.



IMMEDIATE EFFECT

Foreign routers barred from new FCC authorizations. Retailers may sell existing certified stock until depleted.

SAFE HARBOR PATH

Apply to Conditional-approvals@fcc.gov with full supply chain disclosure and US onshoring plan for up to 18-month waivers.