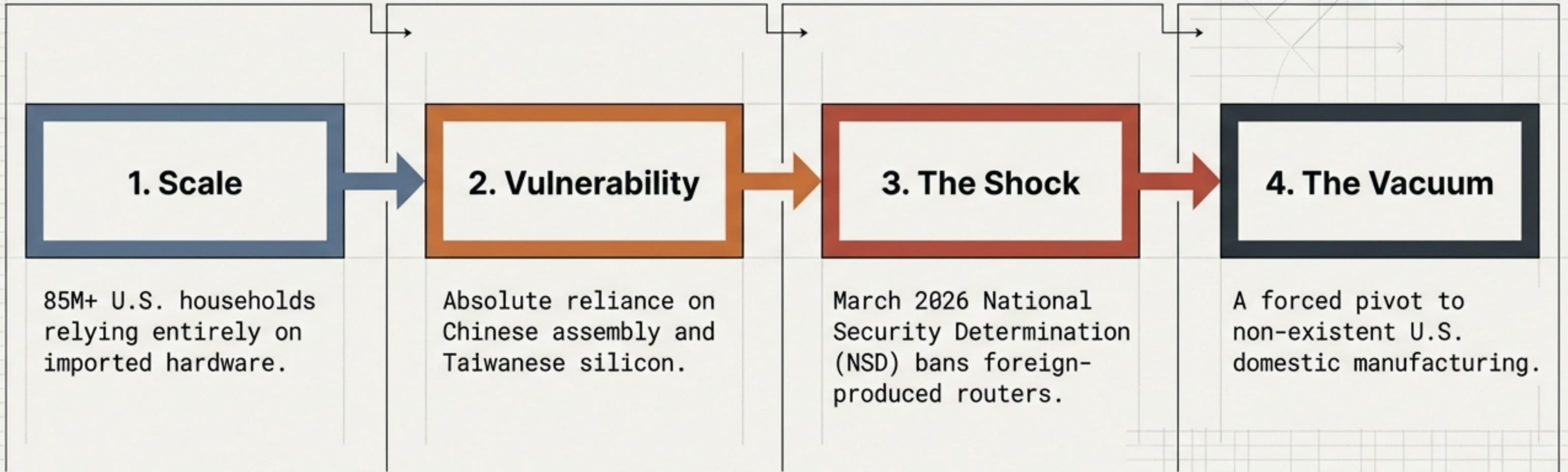


Chokepoint: The 2026 Broadband Supply Chain Shock

How a National Security Determination
Froze the U.S. Router Market

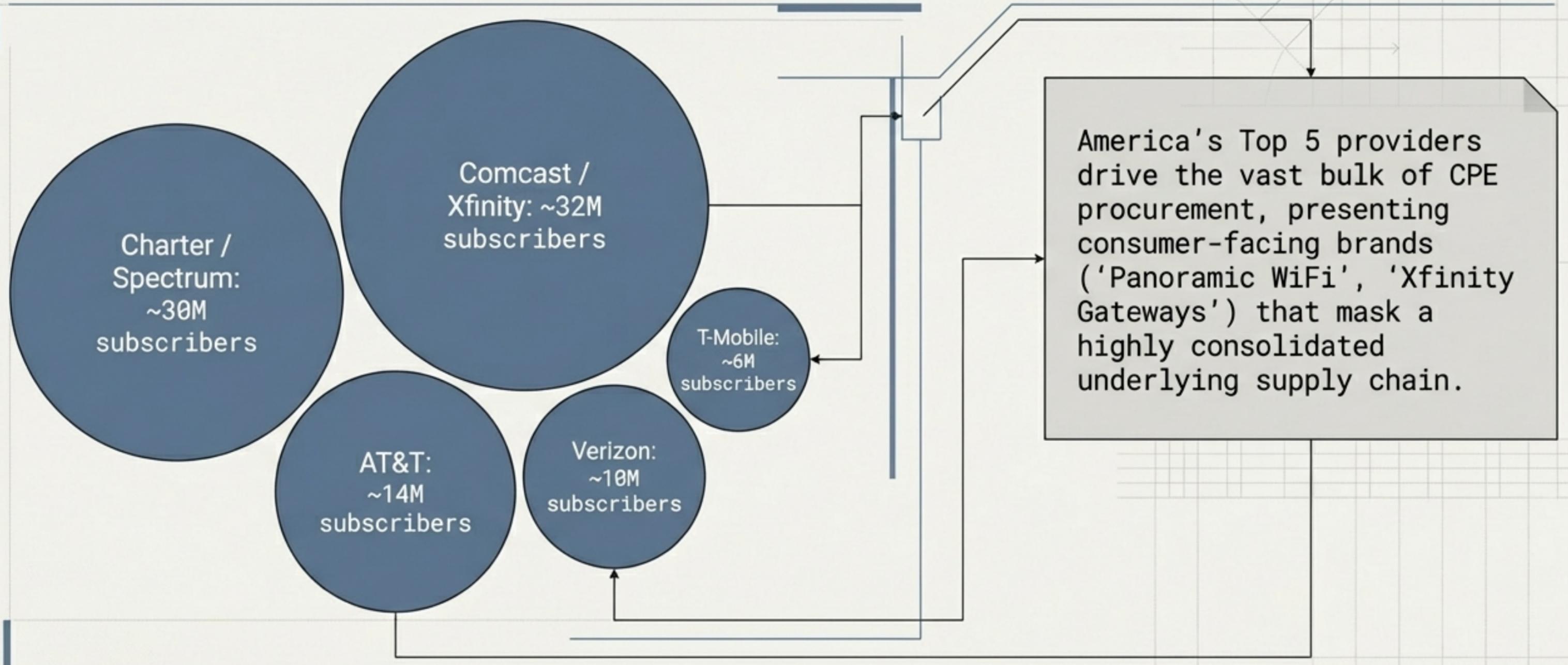
Executive Briefing // Data Current as of March 24, 2026

Executive Summary: From Vulnerability to Embargo



The U.S. imports nearly 100% of its broadband customer premises equipment (CPE). The March 2026 FCC Covered List ruling instantly freezes the pipeline for next-generation devices, mandating an unprecedented, immediate industrial pivot to U.S. soil.

The 85-Million Connection Facade

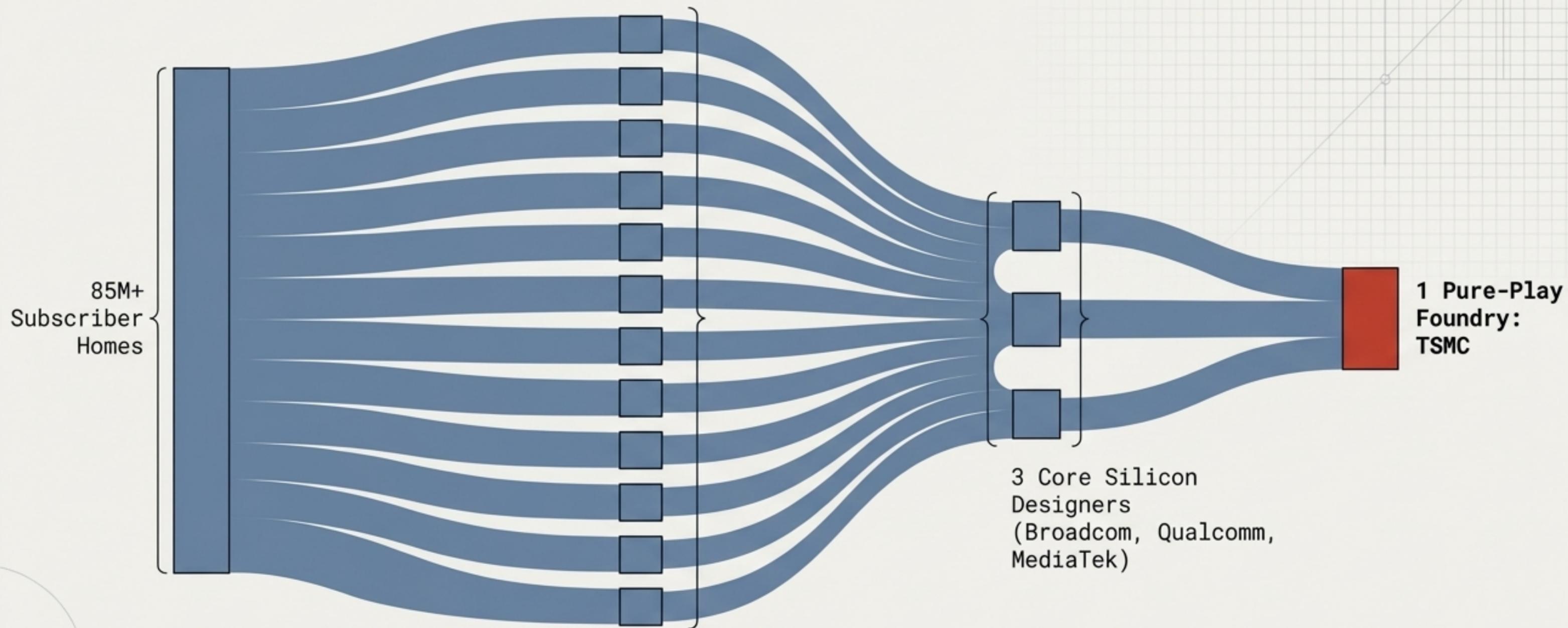


ISP Diagnostic Matrix: The Big Five

ISP	Subscribers	Primary Silicon	Key ODMs	Mfg Origins	FCC Threat Level
Comcast	32M	Broadcom	Vantiva, Sercomm, CommScope	China, Taiwan	CRITICAL 
Charter	30M	Broadcom, Qualcomm	Hitron, Sercomm, Askey	China, Vietnam	CRITICAL 
AT&T	14M	Broadcom, Qualcomm	Humax, Nokia, Arris	Korea, India, China	HIGH 
Verizon	10M	Qualcomm	WNC, Arcadyan, Askey	Taiwan, China	CRITICAL 
T-Mobile	6M	Qualcomm, MediaTek	Arcadyan, Sercomm, Nokia	Vietnam, China, India	HIGH 

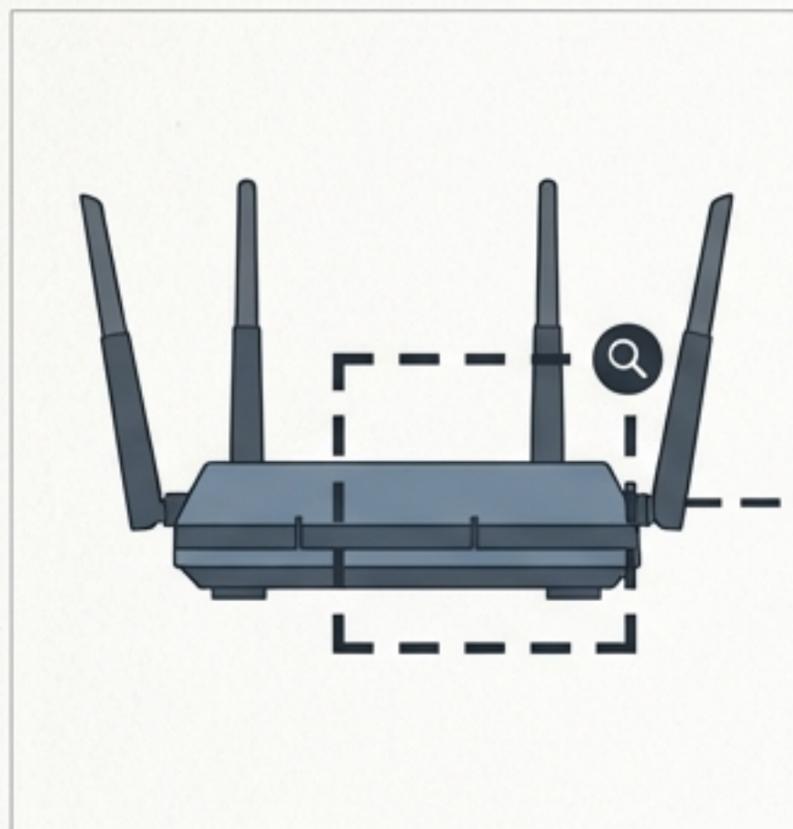
Key Insight: Despite multi-sourcing strategies, every major ISP relies on hardware origins now targeted by the FCC Covered List.

The Dependency Funnel

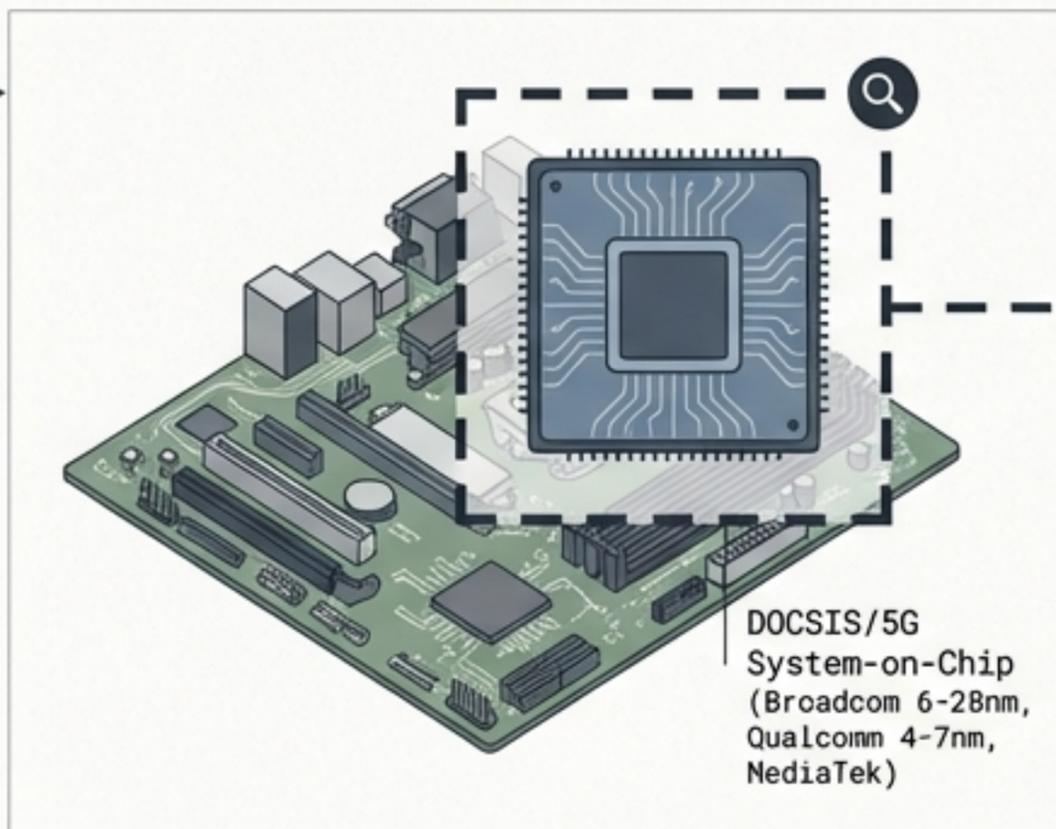


The illusion of choice disappears at the ODM level and collapses entirely at the silicon level.

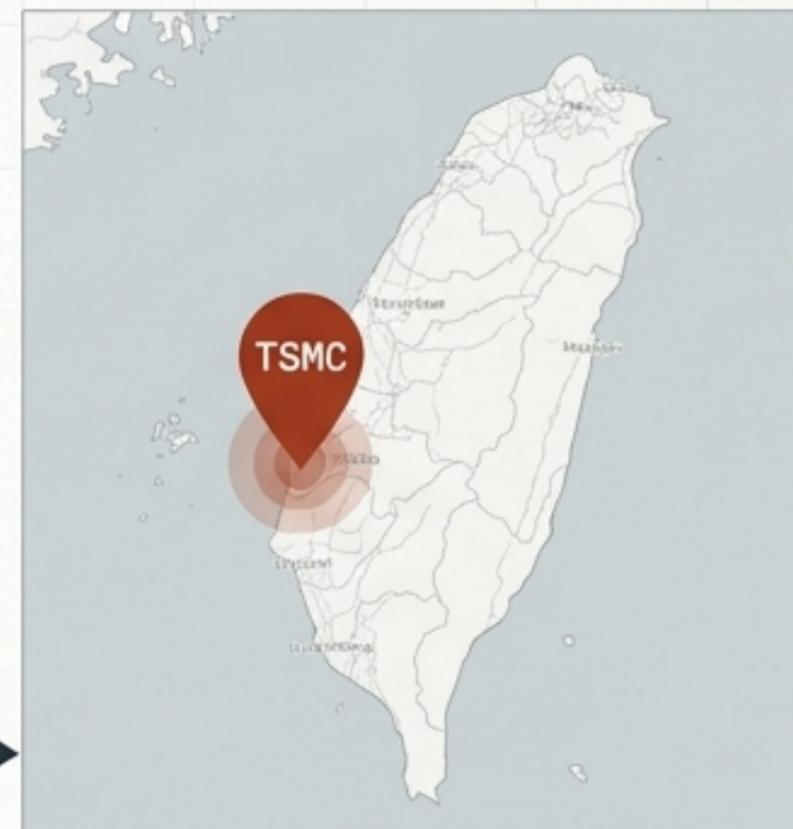
The Silicon Chokepoint



MACRO: BROADBAND GATEWAY
(END-USER DEVICE)



MICRO: CORE SILICON DESIGN (SoC)

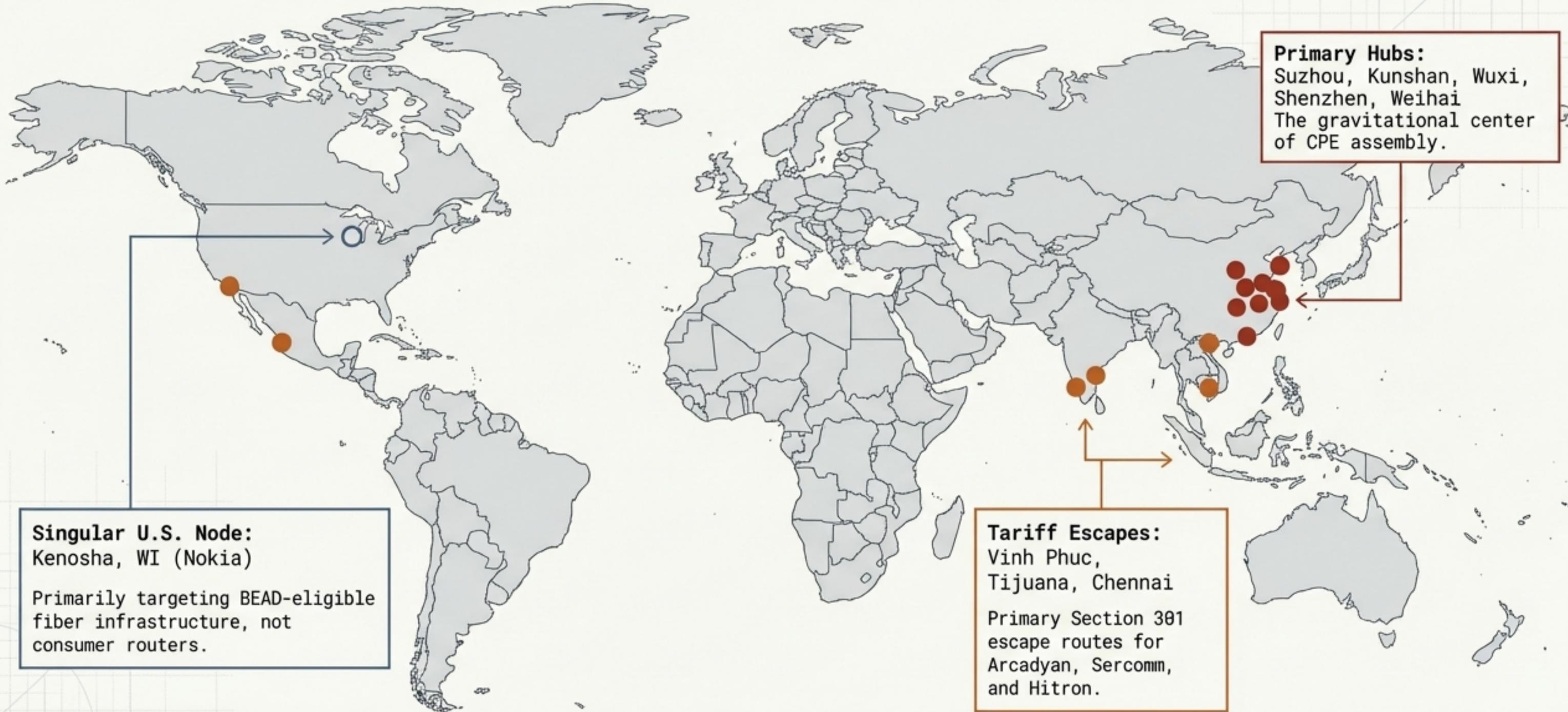


GEO: TSMC FOUNDRY
(CRITICAL JUNCTION)

A disruption at TSMC halts production of every new broadband gateway in the United States, regardless of where final assembly occurs.

The Geographic Reality of Assembly

Pre-2026 tariff migration built alternative hubs, but bypassed the U.S. entirely.



ODM Manufacturing Matrix: The Production Deficit

Manufacturer	HQ Location	China Assembly	Tariff Escape Hubs	U.S. Domestic Readiness
Vantiva	France	Primary	Vietnam, Mexico, India	NONE
CommScope	USA	Pegatron	Mexico	NONE
Arcadyan	Taiwan	Primary	Vietnam	NONE
Sercomm	Taiwan	Primary	Mexico	NONE
Hitron	Taiwan	Primary	Vietnam	NONE
Askey	Taiwan	Primary	Vietnam	NONE
Nokia	Finland	Primary	India	LOW Kenosha, WI - Fiber ONTs

Takeaway: Billions in sunk investment overseas. Zero meaningful U.S. capacity for consumer-grade routers.

The Geopolitical Catalyst: March 2026

Threat Architecture



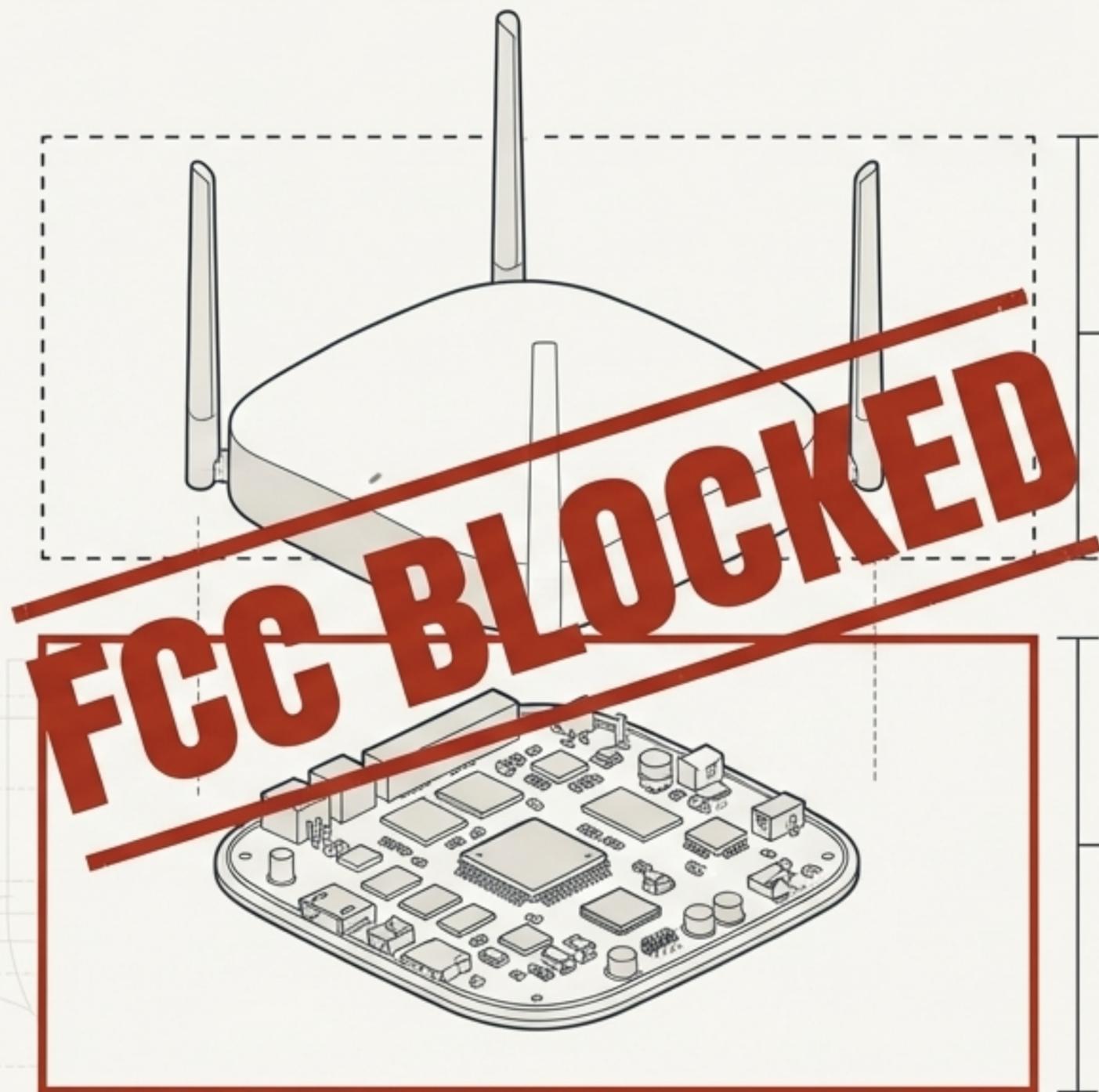
The Justification

CISA and Microsoft proved PRC APT actors leverage compromised foreign-produced routers for lateral movement and password-spray attacks to infiltrate U.S. critical infrastructure.

The Accelerant

Concurrent DOJ criminal antitrust and Commerce Dept national security investigations into TP-Link (65% of U.S. retail market) provided the political scaffolding for the ban.

The New Anatomy of Production



Designed in
San Jose, USA

Assembled in
Vietnam/China

The NSD defines production to encompass any major stage:
Manufacturing, Assembly, Design, AND Development.

The eero Paradox

Even devices with U.S. hardware design heritage are captured by the determination if assembly occurs overseas.

Tariffs punished Chinese assembly; the NSD punishes all foreign production.

The Regulatory Firewall

FCC Covered List Action: Immediate operational effects.

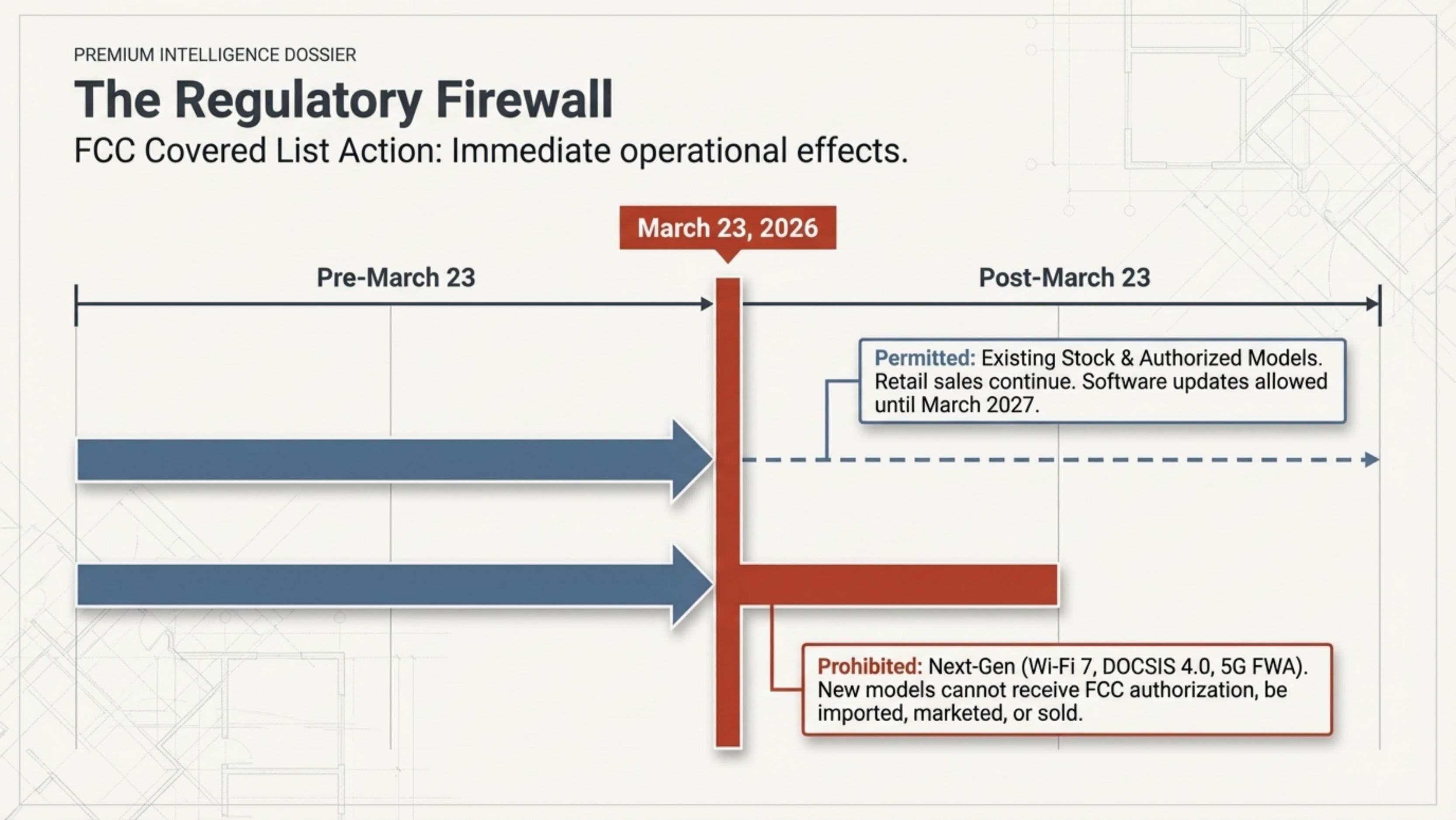
March 23, 2026

Pre-March 23

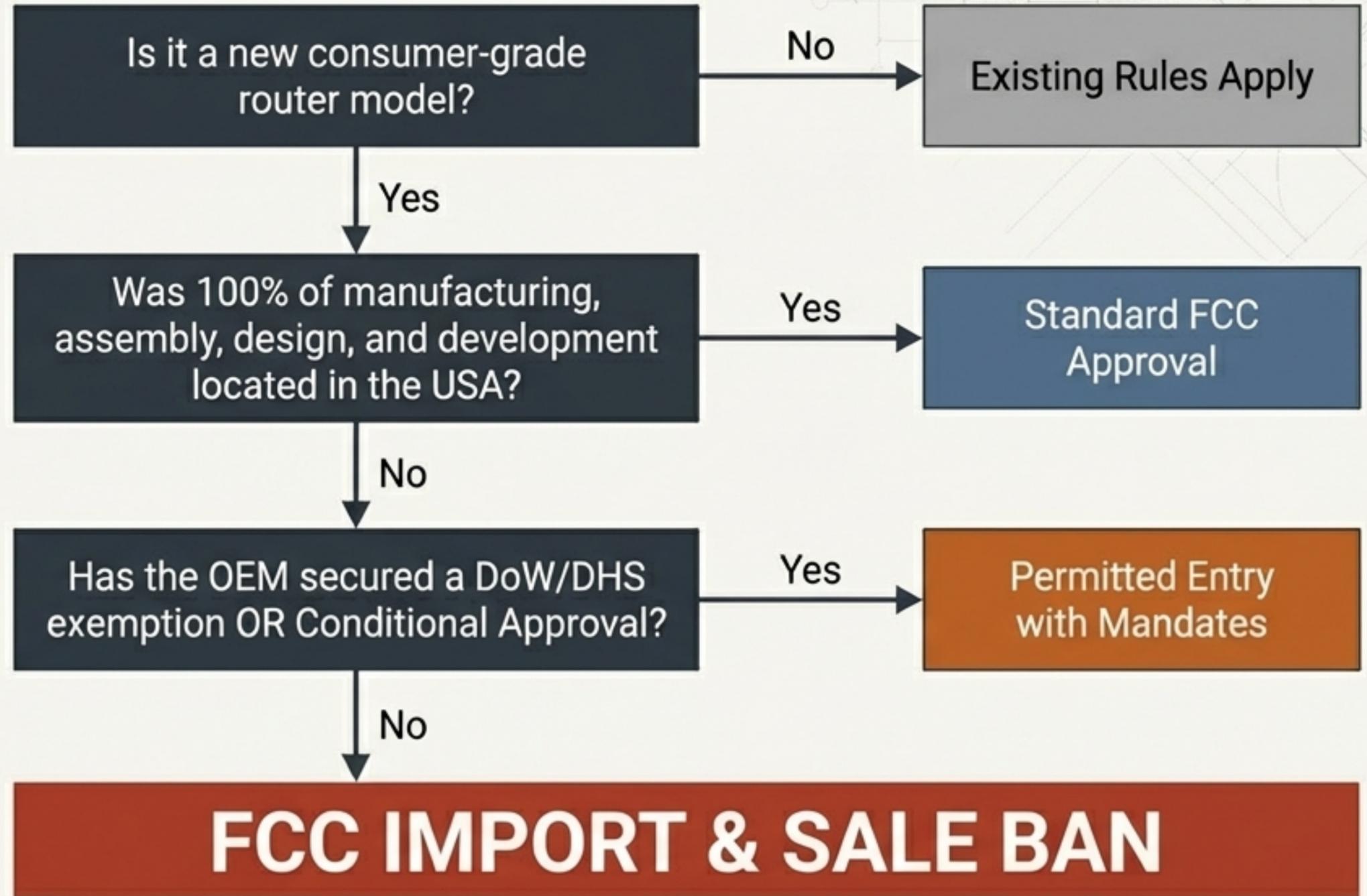
Post-March 23

Permitted: Existing Stock & Authorized Models. Retail sales continue. Software updates allowed until March 2027.

Prohibited: Next-Gen (Wi-Fi 7, DOCSIS 4.0, 5G FWA). New models cannot receive FCC authorization, be imported, marketed, or sold.



Diagnostic: The Hardware Procurement Pipeline



Every ISP and ODM now faces the same fundamental constraint: standard FCC authorization for foreign-produced models no longer exists.

Synthesis: The Domestic Vacuum



- **Insight 1: This is not just a defensive cybersecurity policy.** Roboto Mono.
- **Insight 2:** It is an aggressive, forced industrial policy masked as a security determination.
- **The Reality:** The Conditional Approval escape hatch (Annex A) is the only bridge across the vacuum. It requires a binding commitment to shift manufacturing to the United States.

The New Reality: Build Here or Exit



Short-Term: The Freeze

- The innovation pipeline for DOCSIS 4.0 and Wi-Fi 7 is frozen.
- ISPs must hoard existing authorized models and stretch deployment lifecycles.



Long-Term: The Pivot

- ODMs must apply for Conditional Approval, mandate multi-billion dollar U.S. factory investments, or abandon the 85-million-subscriber U.S. market entirely.

The supply chain question is no longer about tariffs. It is about whether the U.S. can build a domestic manufacturing capability fast enough to replace 100% of its imports.