Market Share Leadership

- **Security**: Cisco 35%
- **Digital Video: IPTV**: Cisco/SA 61%
- **Switching: Modular/Fixed**: Cisco/SA 73%
- **Voice**: Cisco 34%
- **Routing: Edge/Core/Access**: Cisco 59%
- **Wireless: LAN**: Cisco 58%
- **Networked Home**: Linksys 26%
- **Web Conferencing**: Cisco/WebEx 49%
- **Storage: Area Networks**: Cisco 29%
Market Share Leadership

Only company with leadership across all segments

- Integration as sustainable competitive advantage
- Diverse product portfolio for long-term stability

<table>
<thead>
<tr>
<th>Segment</th>
<th>Market Share</th>
</tr>
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Strong Geographical Balance

Total $10.4B  |  8% Y/Y

$5.5B        |  7% Y/Y  
U.S. and Canada

$1.2B        |  27% Y/Y  
Emerging Markets

$1.6B        |  8% Y/Y  
Asia Pacific

$2.1B        |  2% Y/Y  
Europe

Q2 FY11 Fiscal Revenue by Geography
“Cisco’s strategy is based on catching market transitions—the market transitions that affect our customers. With the proliferation of video and collaborative Web 2.0 technologies, the network continues to evolve from the plumbing of the Internet—providing connectivity—to the platform that will change the way we work, live, play and learn.”

John Chambers, Chairman and CEO, Cisco
Market Transitions

Our strategy is guided by the market transitions that affect our customers.
The Network as the Platform...

3–5 Year Goals

Cisco Strategy

FY ’11 Initiatives

Intelligent Information Network

Business Architecture

Technology Architecture

3-5 Year Goals

Initiatives
Cisco: The Convergence Innovator

One Seamless, Transparent Customer Experience

the network as the platform
Creating Sustainable Differentiation Through Platform Leadership

Products

Systems

Solutions & Business Models

Architectural Plays

Platform Leadership

Customer Relevance

Technology Integration
culture

That's the **Human Network**

a place where everyone is connected

Cisco allows people to connect **locally and globally**

collaboration
customers
employees
community
The Cisco Vision

changing the way we work, live, play, and learn. SM

The Mission

to shape the future of the Internet by creating unprecedented value and opportunity for our customers, employees, investors and ecosystem partners
culture

collaboration
customers
employees
community

Cisco allows people to connect locally and globally

That's the Human Network

a place where everyone is connected
culture
employees

...are our competitive advantage

72K+
employees

165+
countries

460+
offices

1/3 sales
1/3 engineering
1/6 service
1/6 other
the idea of community no longer applies to just towns cities or countries
your community
is wherever you need to interact.
we believe **community** belongs to everyone.

Networking Academy

Volunteerism

Make Every Connection a Green Connection

Sustainable Business Practices
technology

Innovation as a means of evolving through...

[Diagram showing Build, Buy, Partner, Internal Innovation, Acquisition Strategy, Go-to-Market / Investment Strategy]
Build

Internal Innovation

20,000+ Engineers

$5.3B+ R&D Investment Annually

30 Major Labs Worldwide

8000 Patents Issued

700 Patents Filed Annually
R&D Commitment

$5.3B

R&D as Percent of FY10 Revenue

Source: Yahoo Finance, Company Financial Statements, analyst estimates used for IBM, Intel and HP FY10
Acquisition Strategy

- Market Acceleration
- Market Expansion
- New Market Entry

Buy
Go-to-Market / Investment Strategy

Partner

Best In Class

Long-Term Partnership

Mutually Beneficial
“Cisco is truly dedicated to customer success. Our mission is to shape the future of the internet by creating unprecedented value and opportunity for our customers, partners, shareholders, and employees.”

John Chambers
Chairman and CEO
Cisco’s History of Customer Satisfaction

10+ years of history—formally tracking customer satisfaction

Central part of Cisco’s culture

Customer satisfaction tied to the bonus plan

Source: Cisco annual survey; measured on a scale of 1 to 5 in fiscal years
history | culture | customers | technology
together we are the human network.