IPv6 Survey:
Taking the Federal Pulse on IPv6

Summary Results

Market Connections, Inc.
June 2006
Outline

- Goals and Objectives
- Methodology
- Respondent Demographics
- General Business and IT Issues and Challenges
- Understanding of IPv6
- Respondents Directly Involved with IPv6: Status and Challenges of Transition and Implementation of IPv6
- Vendor Outsourcing
- Key Findings (to come)
Goals and Objectives

Study undertaken on behalf of Cisco Systems to enhance marketplace understanding and strategic direction. Specifically we looked at:

- Business and IT issues and challenges agency decision makers face on a daily basis.
- Involvement and understanding of IPv6.
- Challenges and barriers surrounding IPv6 transition plans and implementation.
- Vendor outsourcing and contractors likely to be considered as a networking solution provider for IPv6 implementation.
Methodology

- 200 telephone interviews conducted in May 2006 from a Government Computer News subscriber list.

- Respondents screened for level of involvement in the implementation of IT and network solutions for their agency.

- Mix of civilian and defense agencies, business and IT job functions and involvement with IPv6.
Respondent Demographics
**Overall Sample Population: Agency, Job Function and Involvement**

- **Agency**
  - Defense or Intelligence: 28%
  - Civilian or Independent: 72%

- **Primary Job Focus**
  - IT related: 53%
  - Line of Business: 47%

- **Involvement in IT**
  - Evaluate products/services: 63%
  - Recommend/specify brands: 54%
  - Determine the need: 53%
  - Establish tech specs or architects: 50%
  - Establish business plan: 42%
  - Authorize/approve purchases: 41%

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You are an employee of which of the following? Are you mainly involved in the daily business operations of your agency or more specifically, IT related functions? Please indicate the scope of your involvement of IT and network solutions for your agency or organization.
Overall Sample Population: Involvement in IPv6

- The survey meant to evaluate attitudes of all IT decision makers toward IPv6.
- One-third of respondents were directly involved in the planning or implementation of IPv6.
- Significantly more IT related and defense agency respondents were involved in the planning or implementation of IPv6 than business or civilian respondents.

On a scale of one to five, where one is not at all involved and five is very involved, how involved are you in the planning or implementation of IPv6 within your agency organization?
General Business and IT Issues and Challenges
Overall, workforce productivity and continuity of operations (COOP) were the most important business issues to respondents.

Business respondents were more focused on the importance of workforce productivity, citizen satisfaction and cost reduction than IT respondents.

On a scale of one to five where one is not at all important and five is very important, how important are the following business issues right now?

M A R K E T C O N N E C T I O N S, I N C.
While most IT issues were important to respondents, privacy and security of communications and quality of service were most important, overall.

Respondents directly involved in IPv6 rated network performance, management and cost of operations significantly more important.

Interoperability was more important to defense agency respondents than civilian respondents.

On a scale of one to five where one is not at all important and five is very important, how important are the following IT issues right now?

MARKET CONNECTIONS, INC.
Understanding of IPv6
Concern for Availability of IP Addresses by Involvement

- Overall, 48% of respondents were concerned with the availability of IP addresses.

- Respondents involved with the planning or implementation of IPv6 were significantly more concerned for the availability of IP addresses going forward.

On a scale of one to five, where one is not concerned at all and five is very concerned, how big of a concern for you is the availability of IP addresses going forward?
Overall Sample Population: What is Associated with IPv6?

- Top of mind, respondents associated security with IPv6 implementation.

- There was no clear, single association with IPv6. Respondents’ answers varied widely.
Overall Sample Population: IPv6 Benefits and Challenges

- Security and additional IP addresses were the leading top of mind benefits respondents associated with IPv6 implementation.

- Cost and security were noted as the top challenges respondents will face implementing IPv6.

What do you believe will be the ONE most significant benefit once the implementation of IPv6 is completed?

What do you believe will be the ONE most significant challenge or barrier you will face implementing IPv6?
Specific Business Issues Impacting Implementing IPv6

- Business respondents believed implementing IPv6 would have the most significant impact on COOP, workforce productivity, and citizen satisfaction.

On a scale of one to five where one is no effect at all and five is a significant impact, how do you believe implementing IPv6 will affect the following business issues? (Asked only of those primarily involved in agency business activities.)
Specific IT Issues Impacting Implementing IPv6

- IT respondents believed implementing IPv6 would have the most significant impact on expanding network capacity/scalability and privacy and security of communications.

On a scale of one to five where one is no effect at all and five is a significant impact, how do you believe implementing IPv6 will affect the following IT issues? (Asked only of those primarily involved in agency IT activities.)
Respondents Directly Involved with IPv6:
Status and Challenges of Transition and Implementation of IPv6
Involvement with IPv6

- According to respondents, IT/IS/MIS/Network/Systems managers will be the most involved in the planning and implementation of IPv6.

Where one is not at all involved and five is very involved, to what extent are the following involved in the planning and implementation of IPv6 within your agency or organization?

MARKET CONNECTIONS, INC.
Expected Timeline of IPv6 Planning and Implementation

- Less than two percent of respondents have completed their IPv6 planning process.

- Only fourteen percent of respondents have begun their IPv6 implementation process.

- More than one-third of respondents will not complete their IPv6 planning or implementation process until the 2007 fiscal year.

When do you expect to complete your IPv6 planning process?
When do you expect to begin your IPv6 implementation process?
Not Yet Begun Milestones of IPv6 Conversion

- Sixty percent (60%) of respondents had not yet begun to receive funding approval.

- Defense agency respondents were more likely to have assigned an officer to coordinate and lead agency planning than civilian agency respondents.

Please tell me if you have not yet begun, are in the process of or have completed working on the following milestones for IPv6 conversion.

MARKET CONNECTIONS, INC.
Completed Milestones of IPv6 Conversion

- Respondents were most likely to be in the process of or completed inventorying existing technology devices.
- Less than ten percent of respondents have completed monitoring the benefits of IPv6, an IPv6 transition plan or all agency infrastructures using IPv6.

Please tell me if you have not yet begun, are in the process of or have completed working on the following milestones for IPv6 conversion.

MARKET CONNECTIONS, INC.
Challenges Implementing IPv6

- Funding/budget was the top challenge respondents were facing completing their IPv6 implementation.

- A lack of time and experienced staff also presents a challenge to many respondents.

On a scale of one to five, where one is not at all challenging and five is extremely challenging, how challenging are or were the following in your completion of IPv6 implementation?

MARKET CONNECTIONS, INC.
Addressing IPv6 Planning and Implementation

- Half of respondents plan to develop their transition plan in-house.
- Almost half of respondents were planning to collaborate with a vendor to address IPv6 implementation in their agency.

Which of the following best describes how you are planning to or already addressing the transition plan of IPv6 within your agency or organization?

Which of the following best describes how you are planning to or already addressing the implementation of IPv6 within your agency or organization?
IPv6 Mandate

- More than half of respondents would likely consider IPv6 even if it had not been mandated.

- Reasons for not considering implementing IPv6 if it had not been mandated include: cost, no compelling business driver, and hesitancy to implement unproven technologies.

- Without a mandate in place, almost forty percent of respondents would not have implemented IPv6 until FY 2008 or later.

How likely would you be to consider IPv6 now if it had not been mandated? What is your reason for not considering IPv6 implementation? Without the mandate in place, when do you believe your agency would have implemented IPv6?
Vendor Outsourcing
**Solution Provider Assistance for IPv6 Implementation**

- Respondents were most likely to consider using an industry solution provider for technical support during implementation, and for technical assistance during planning stage.

Which of the following could an industry solution provider assist you with to improve or enhance your IPv6 implementation?

MARKET CONNECTIONS, INC.
Vendors Associated with IPv6

- More than half of respondents could not name a top of mind vendor they considered a leader for planning and implementing IPv6 in federal agencies.

- When given a list of vendors to choose from, almost three-quarters of respondents selected Cisco as the networking company they most associate with IPv6.
Important Attributes When Choosing a Vendor

- The most important attributes when selecting a vendor for respondents included: providing a system-wide view, risk mitigation tools for transition, cost, and training and support.

Using a scale of one to five, where one is not at all important and five is very important, how important are the following attributes/factors when choosing a vendor to assist you in your efforts?
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