Cisco
Federal IPv6 Survey Report

Company Confidential

April 2011

MARKET CONNECTIONS, INC.

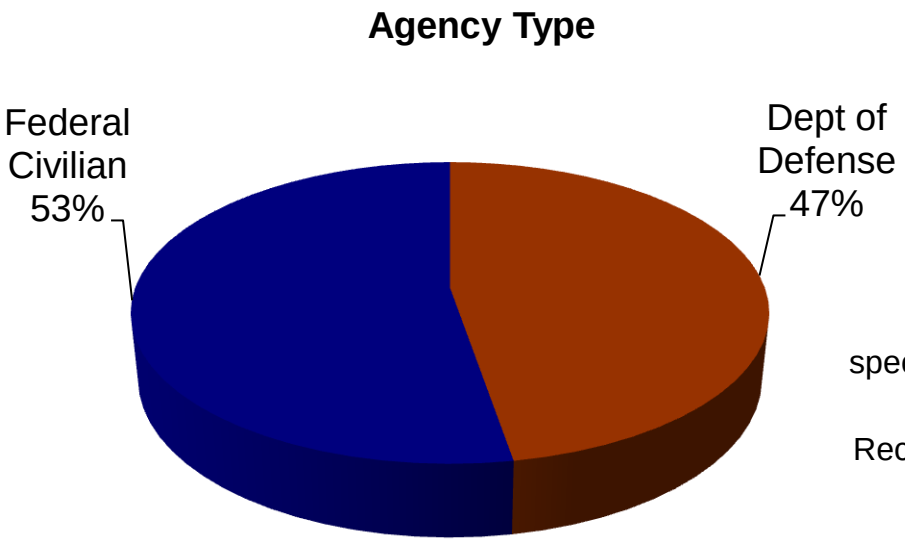
Research You Can Act On

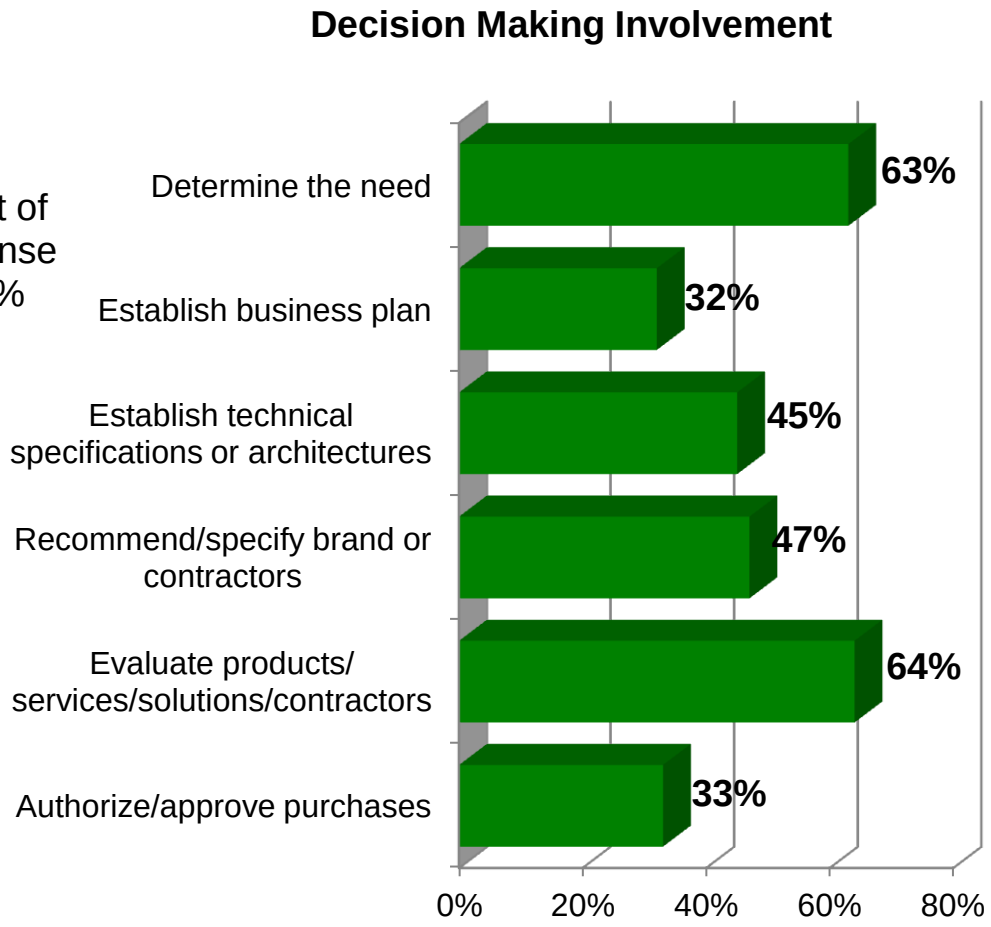
Background

- Online survey of 200 IT and network solution decision makers and influencers involved with IPv6.
- Participants represent more than 20 federal government agencies and all branches of the military.
- Where possible, trend data from a similar study in 2006 are reported.

Demographics and Classifications

Agency Type and Decision Making Involvement

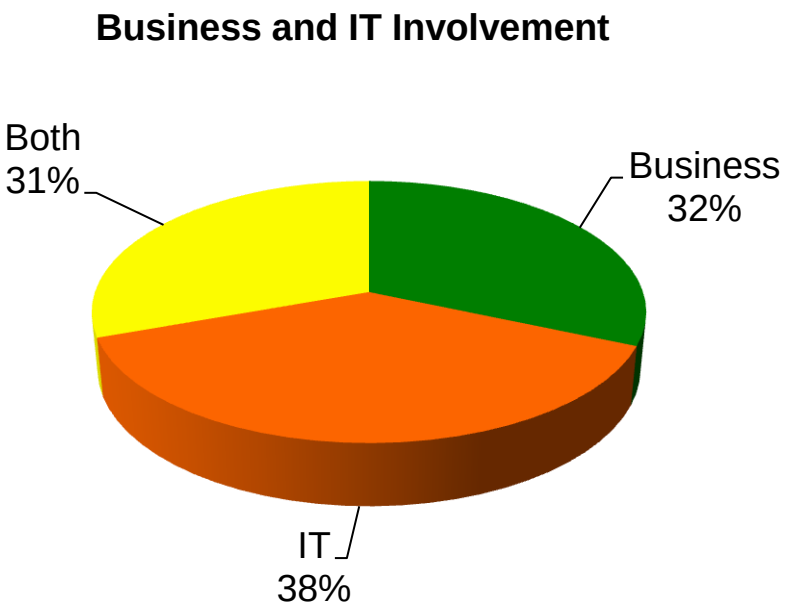


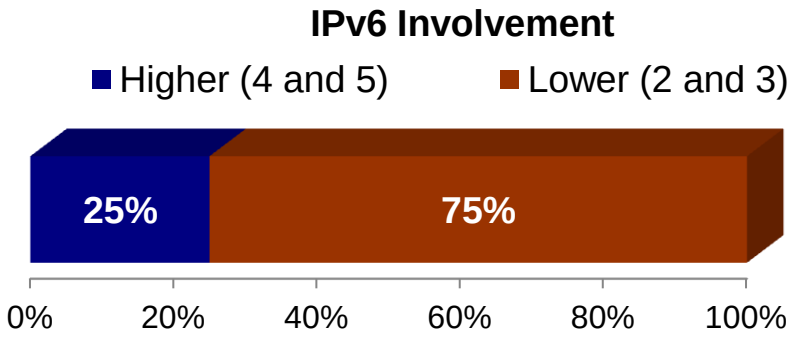


Multiple responses were allowed, thus percentages add to more than 100%.

Q: Which of the following best describes your current employer?
Q: Please indicate the scope of your involvement in the implementation of information technology (IT) and network solutions for your agency? (select all that apply)

Business, IT and IPv6 Involvement





Q: Are you more involved in the daily business operations of your agency or more involved with IT related functions?
Q: How involved are you in the planning or implementation of IPv6 within your organization? (1-not at all involved, 5-very involved)

Survey Findings

IPv6 Planning and Implementation

- Approximately one-quarter of participants indicate that their organization has established an IPv6 enablement timeline and addressing plan, as well as acquired an IPv6 address block.
- Participants with higher involvement in IPv6 are significantly more likely to indicate completion of all planning and implementation steps.

	Overall Completion	Planning and Implementation Step	Higher IPv6 Involvement	Lower IPv6 Involvement
✓	29%	Established an IPv6 enablement timeline	54%	20%
✓	26%	Established an IPv6 addressing plan	50%	17%
✓	24%	Acquired an IPv6 address block	44%	17%
✓	20%	Developed an IPv6 security policy	44%	11%
✓	16%	Enabled IPv6 within their Enterprise Architecture	30%	11%
✓	16%	Established IPv6 peering with their Service Provider	40%	8%
✗	38%	Have not completed any of these planning and implementation steps	12%	47%

Multiple responses were allowed, thus percentages add to more than 100%.

Q: Which of the following IPv6 planning and implementation steps have you completed?

Awareness of IPv6 Milestone Progress

- Although the deadline for designating an IPv6 Transition Manager has passed, 27% of participants believe that their organization has not yet begun this process.
- Budget, personnel and time are the three main challenges or barriers to completing the IPv6 implementation milestones.

5% have upgraded internal client applications that communicate with public internet servers and supporting enterprise networks, to operationally use native IPv6

(47% are in process, 48% have not yet begun)

8% have upgraded public/external facing servers and services

(58% are in process, 34% have not yet begun)

34% have designated an IPv6 Transition Manager

*(39% are in process, **27% have not yet begun**)*

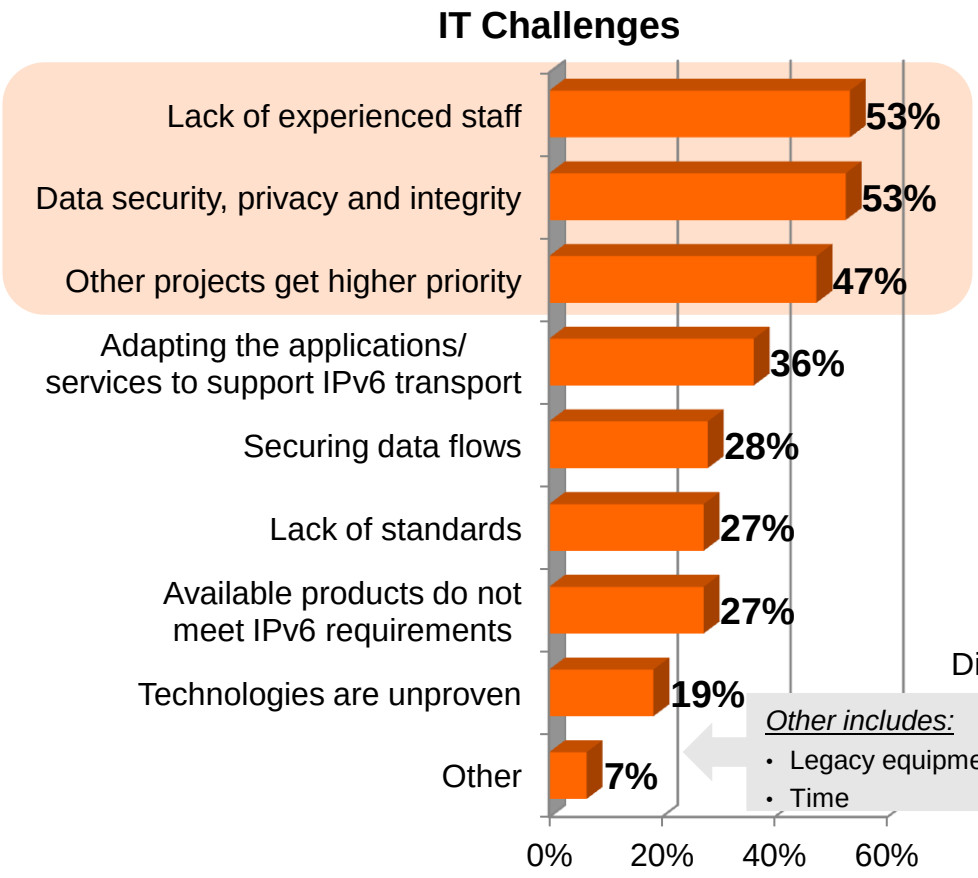
Top 3 Milestone Challenges/Barriers
Budget/Funding - 33%
Personnel resources -12%
Time - 8%

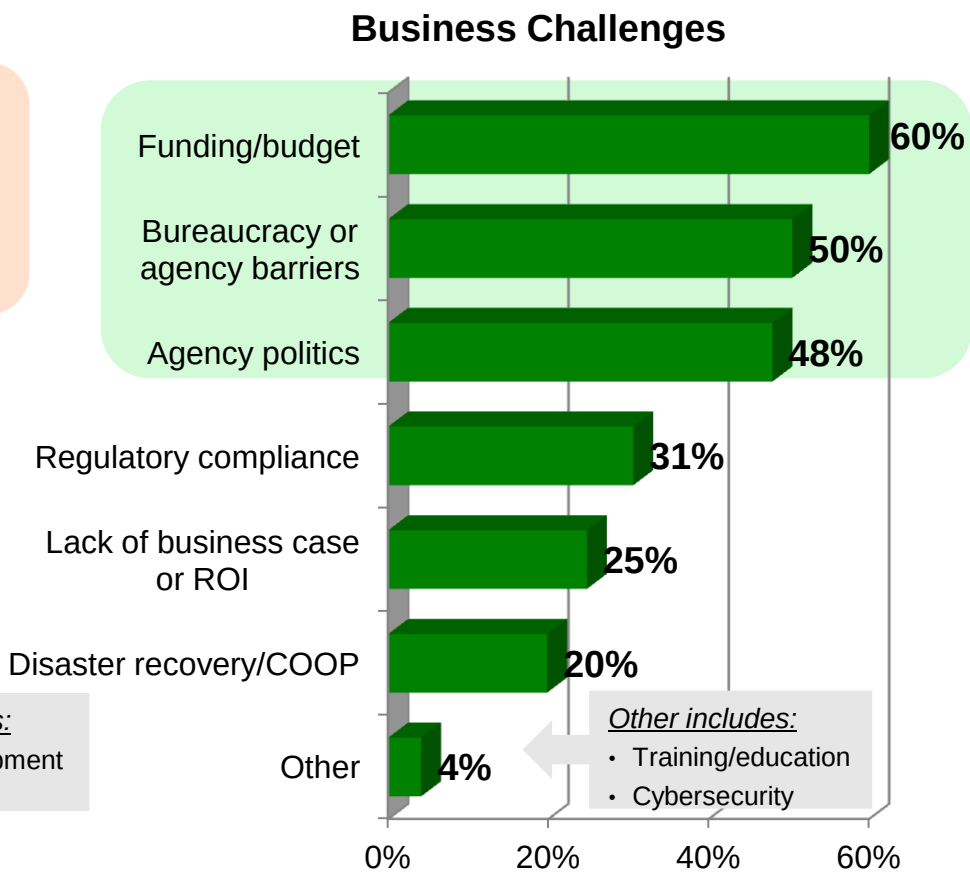
18% said there are no challenges or barriers to achieving the IPv6 milestones.

Q: Please indicate your progress toward the following milestones for IPv6 implementation as outlined by the September 28, 2010 Office of Management and Budget (OMB) memo.
Q: What challenges or barriers, if any, do you foresee to your agency's completion of the IPv6 implementation milestones? (open-end)

IT and Business Challenges

- Top IT challenges for IPv6 planning and implementation are lack of experienced staff, data privacy and integrity, and other projects getting higher priority.
- Top business challenges are funding/budget, bureaucracy and agency politics.



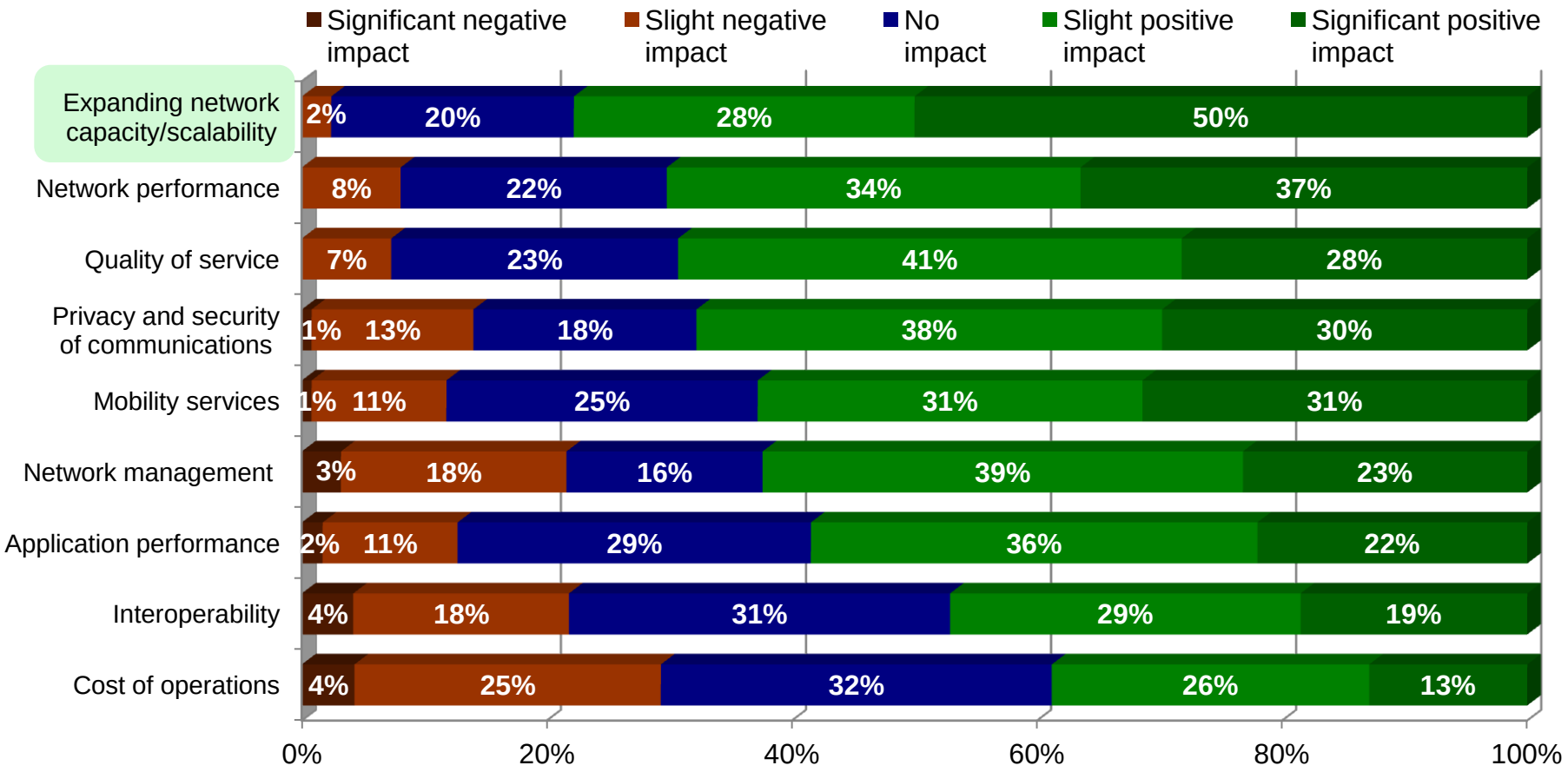


Multiple responses were allowed, thus percentages add to more than 100%.

Q: Which of the following are, or were, IT challenges in your IPv6 planning and implementation? (Select all that apply)
Q: Which of the following are, or were, business challenges in your IPv6 planning and implementation? (Select all that apply)

Impact of IPv6 on IT Areas

- Participants involved in their organization's IT functions view IPv6 as having the most positive impact on expanding network capacity/scalability, with one-half believing it to have a significantly positive impact.

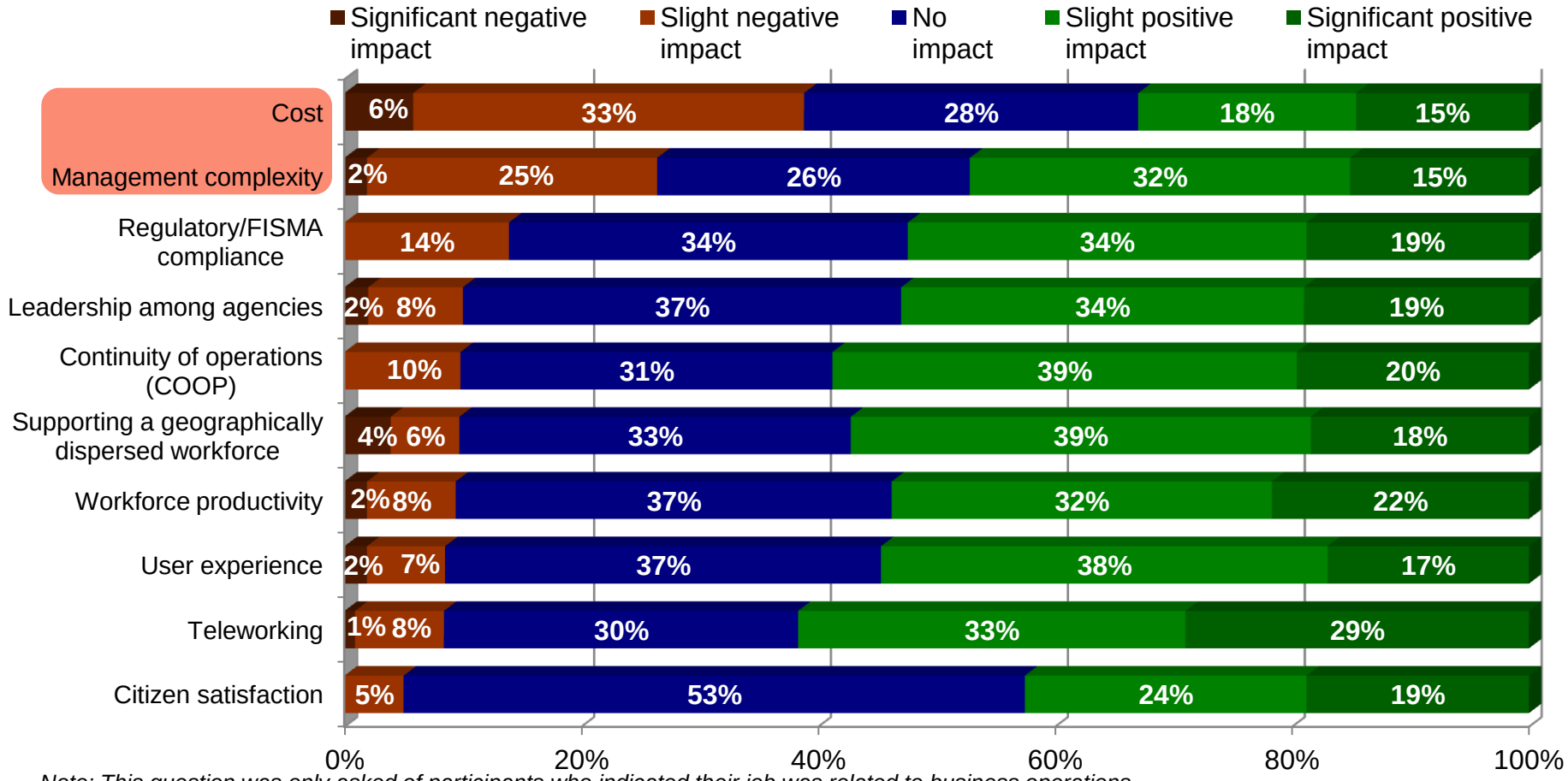


Note: This question was only asked of participants who indicated their job was related to IT functions.

Q: How do you believe implementing IPv6 will affect the following IT areas?

Impact of IPv6 on Business Areas

- Unlike IT participants who see a more positive impact overall for IPv6, business participants are more likely to be unsure of IPv6's impact and see more areas of negative impact, especially with regard to cost and management complexity.



Note: This question was only asked of participants who indicated their job was related to business operations.

Q: How do you believe implementing IPv6 will affect the following business areas?

IPv6 Transition Approach and Linked Projects

- Four out of ten participants are planning to upgrade applications and infrastructure along with the IPv6 transition, rather than just meeting the minimum requirements.
  - Of those planning upgrades in tandem with IPv6 implementation, datacenter consolidation, unified communications and cloud computing are the most common.

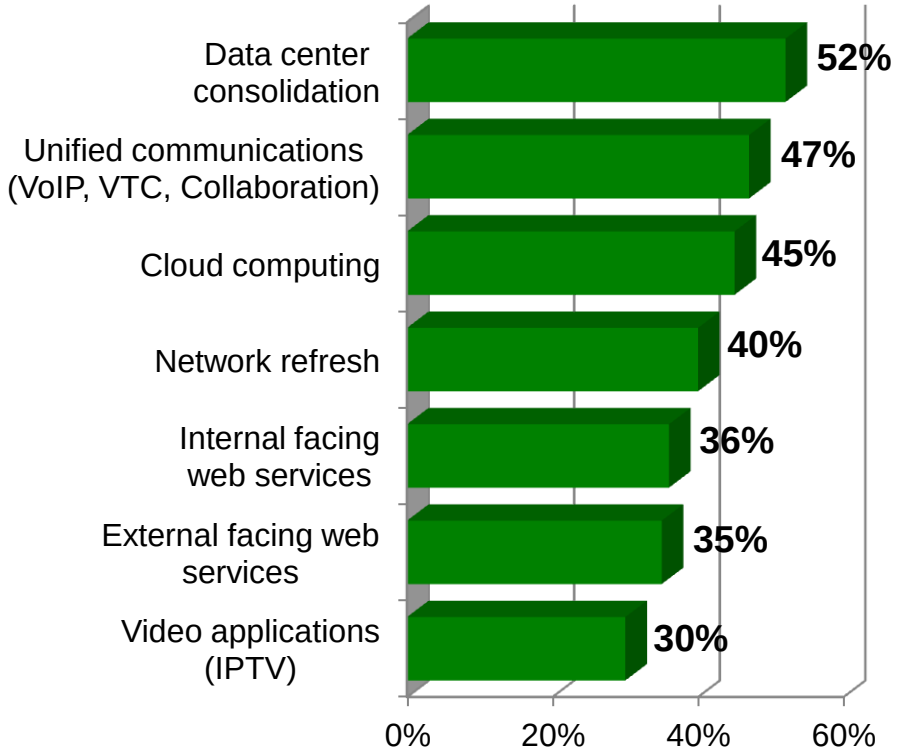
IPv6 Transition Approach

14% are using the IPv6 transition as a basis for upgrading most applications and infrastructure

30% are upgrading select applications and infrastructure in addition to the required changes

56% are planning to meet the minimum requirements of the IPv6 transition

Projects Linked to IPv6 Transition

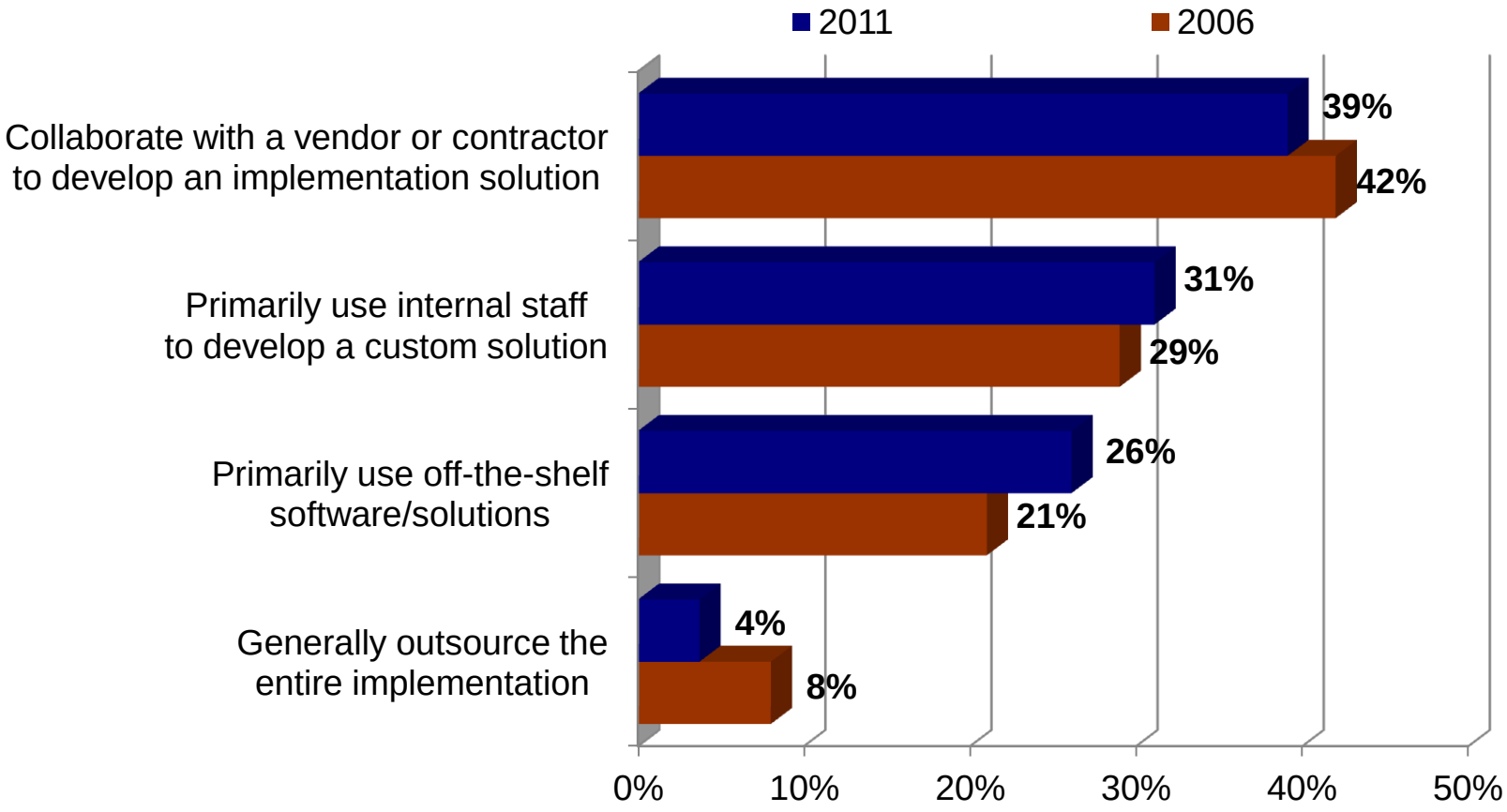


Multiple responses were allowed, thus percentages add to more than 100%.

Q: Which of the following best describes your agency's approach toward IPv6 implementation?
Q: Which of the following IT projects are you planning on linking to, or implementing in tandem with, the IPv6 transition? (select all that apply)

IPv6 Implementation Strategies

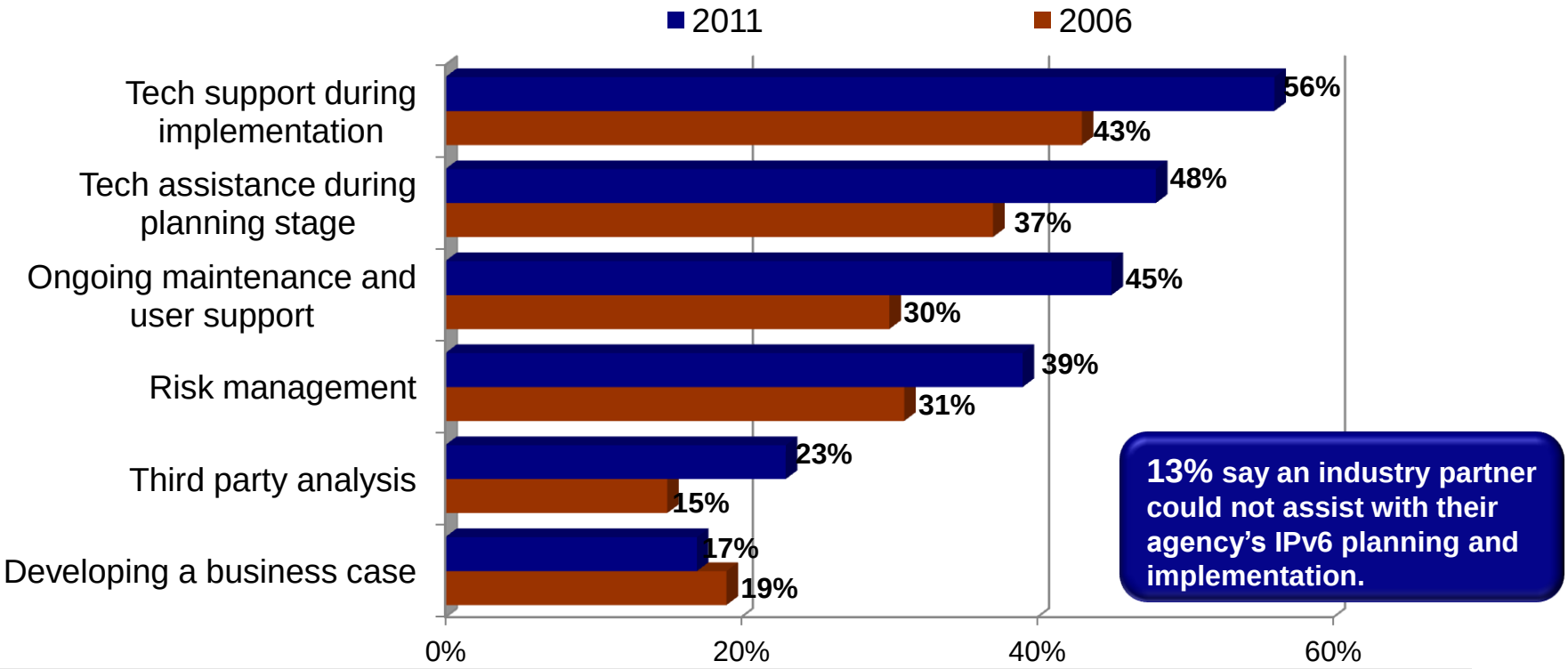
- Current strategies for IPv6 implementation are similar to those in 2006, with 39% looking to collaborate with a vendor or contractor and 31% planning to use internal staff to develop a custom solution.



Q: Which of the following statements best describes how you are planning to address, or are already addressing, the implementation of IPv6 within your agency?

Industry Assistance for IPv6 Implementation

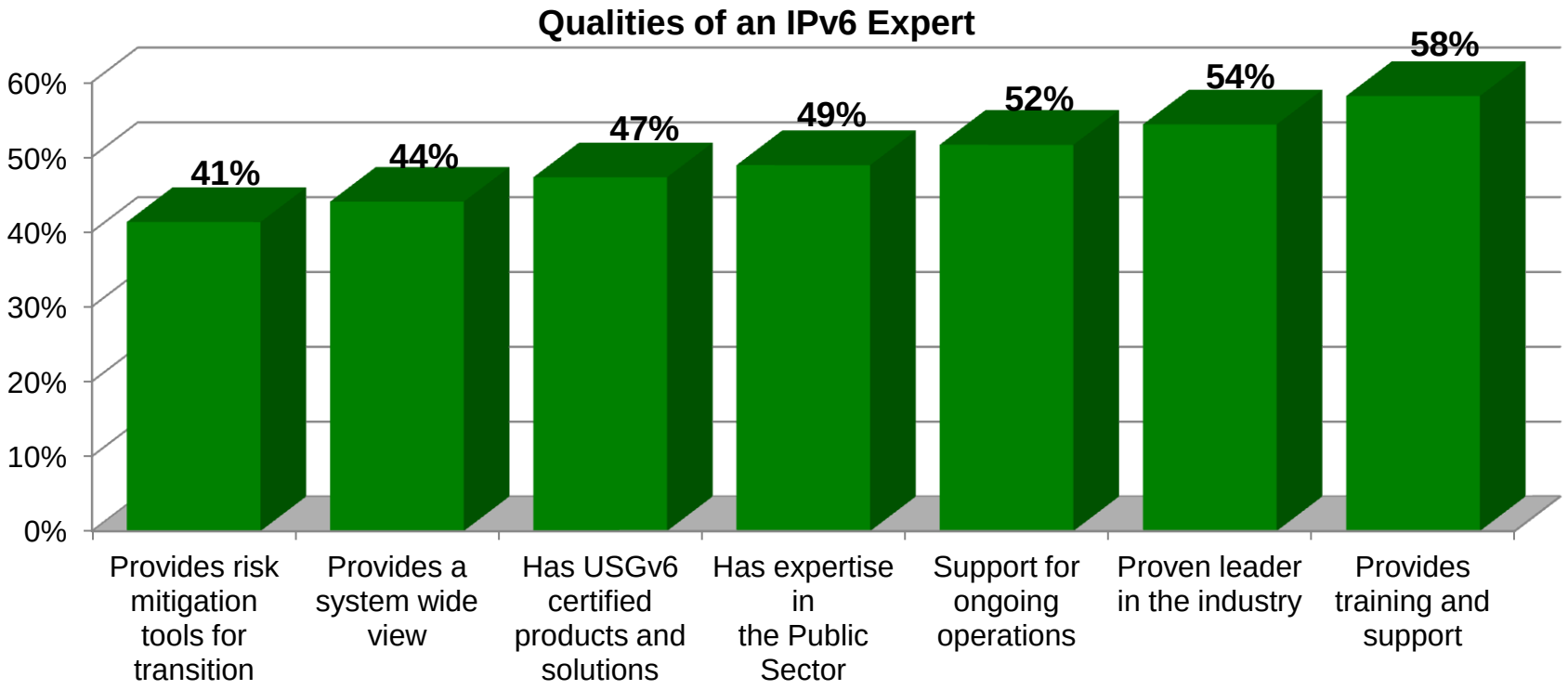
- Over one-half of participants could use industry technical assistance during their planning and implementation of IPv6.
  - Those with higher involvement in their agency's IPv6 initiatives are significantly more likely than those with lower involvement to say industry could help with tech support during implementation (69% and 52%, respectively).
- More participants in 2011 are looking for ongoing maintenance and user support.



Q: In what ways could an industry solution provider assist you in your IPv6 planning and implementation? (select all that apply)

IPv6 Expert Qualities

- Those with higher IPv6 involvement in their agencies are significantly more likely than those with lower involvement to say that being a proven leader in the industry is a necessary quality (66% vs. 49%).
- Federal Civilian participants are significantly more likely than Defense participants to say that public sector expertise is necessary (54% vs. 36%).

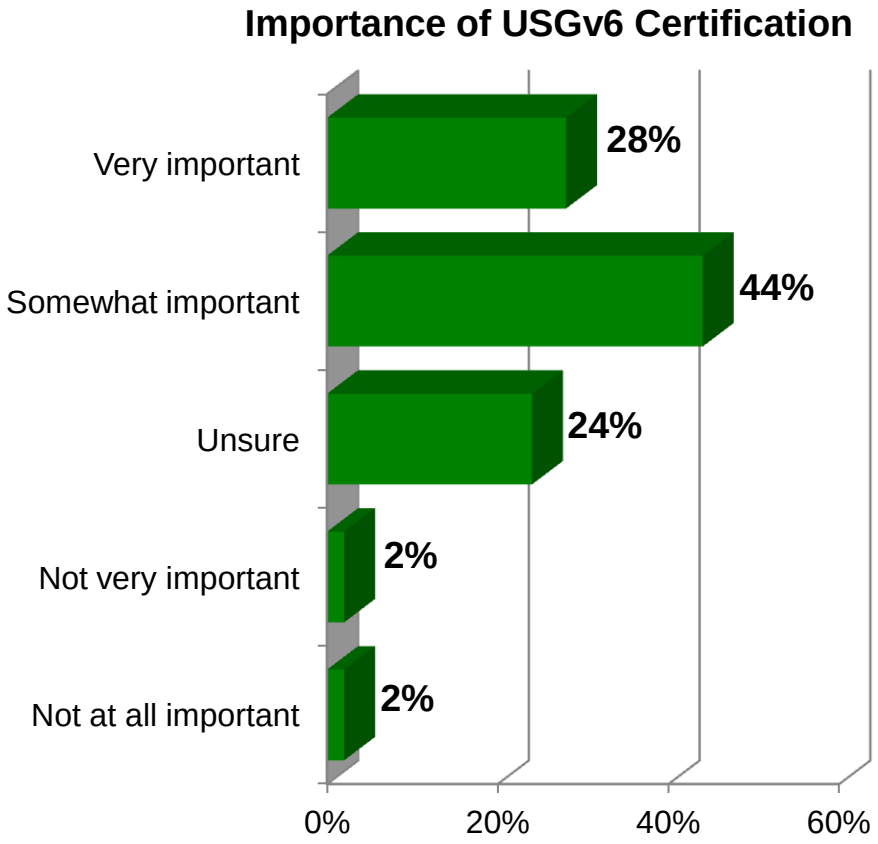


Multiple responses were allowed, thus percentages add to more than 100%.

Q: Which of the following are necessary in order for you to consider a company an IPv6 expert? (select all that apply)

USGv6 Certification

- Nearly three-quarters of participants indicate that USGv6 certification is important when deciding to purchase new networked products or solutions.



Q: When deciding to purchase a new networked product or solution, how important is USGv6 certification?

Top of Mind IPv6 Companies

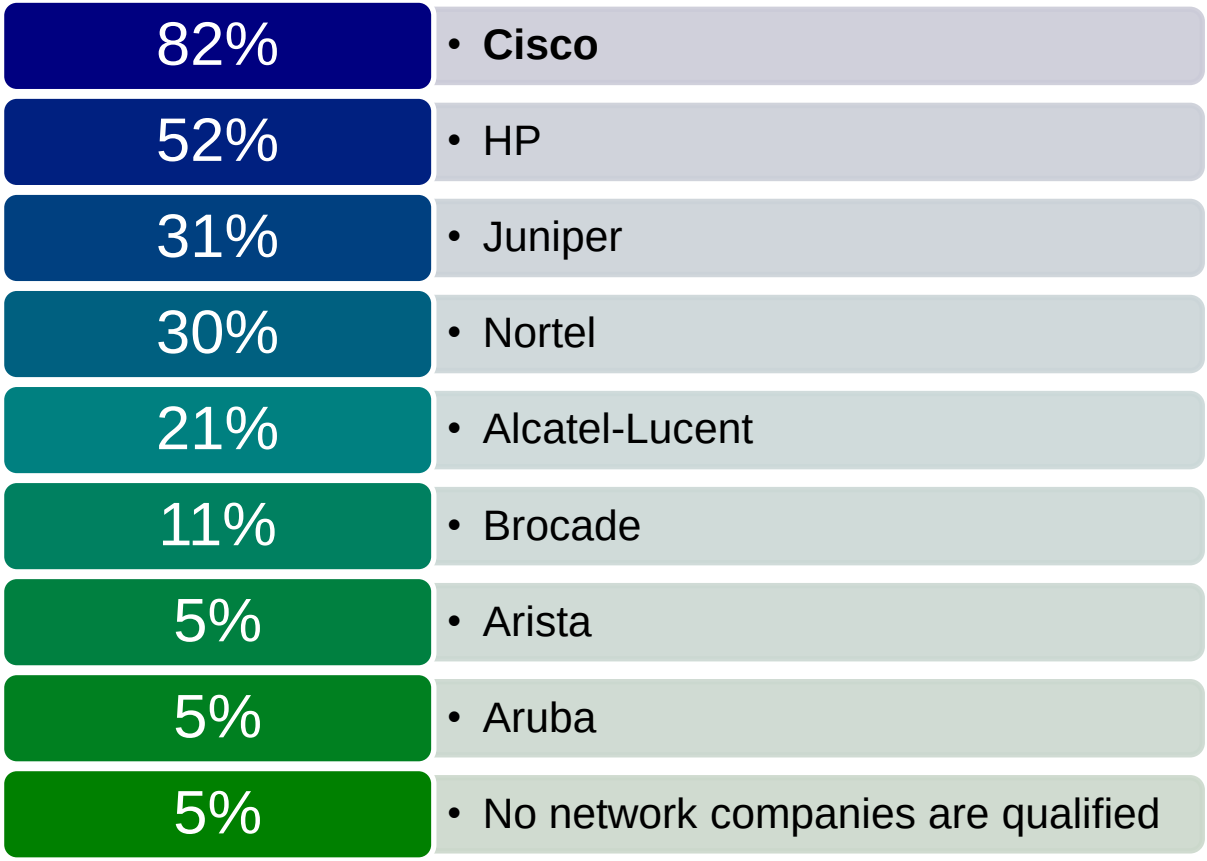
- Cisco is mentioned most often as the top of mind company for IPv6 solutions and support.
- However, twenty percent of participants said that no company came to mind for IPv6.

Top of Mind IPv6 Companies	
Cisco	**39%**
Microsoft	7%
IBM	6%
Juniper	3%
Dell	2%
Apple	1%
Booz Allen Hamilton	1%
Lockheed Martin	1%
Boeing	1%
Raytheon	1%
Other (30 single mentions)	19%
None	20%

Q: What is the first company that comes to mind when you think of IPv6 solutions and support? (open-end)

Qualified Network Companies

- The vast majority of participants consider Cisco to be qualified to help with their IPv6 transition.
- Participants with lower IPv6 involvement are significantly less likely to see Brocade and Aruba as qualified.

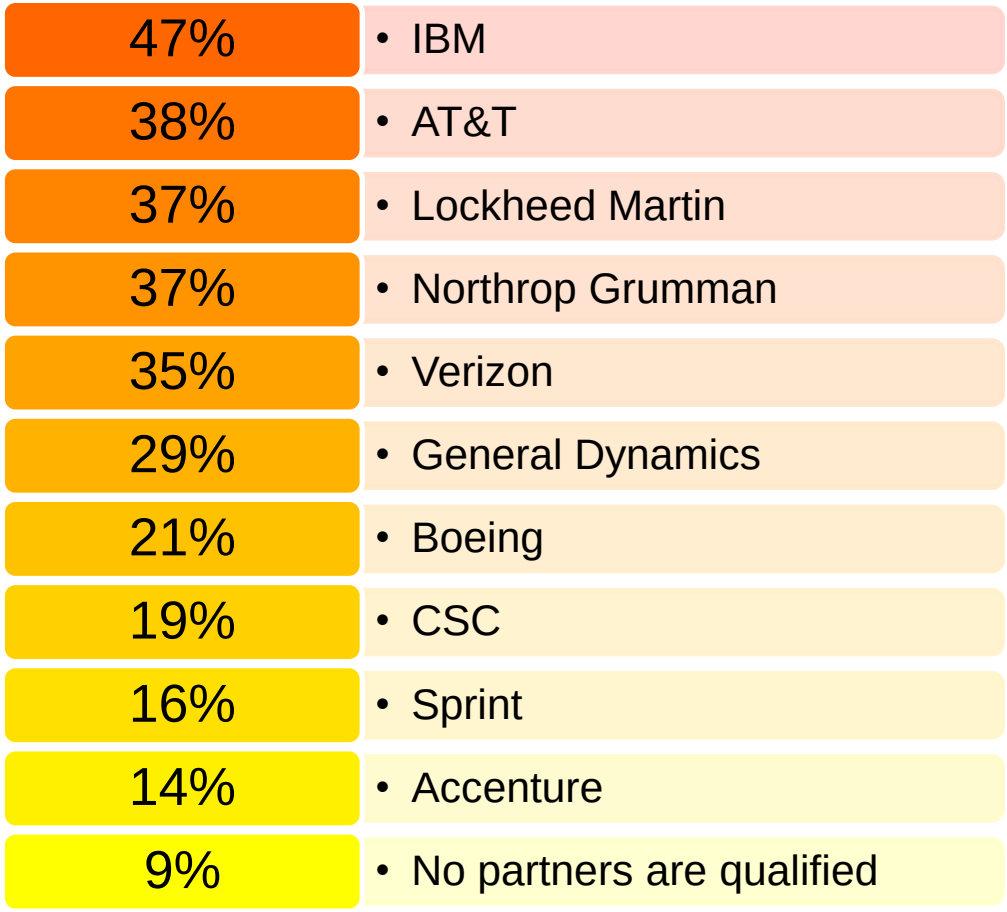


Multiple responses were allowed, thus percentages add to more than 100%.

Q: Which of the following network companies do you consider qualified to help with your IPv6 transition?

Qualified Partner Companies

- In addition to the previously mentioned network companies, respondents were also asked about the qualification of various other partner companies.
  - Nearly one-half of respondents believe that IBM is qualified to assist with their IPv6 transition.
  - Defense participants are significantly more likely than Federal Civilian participants to consider Lockheed Martin and Northrop Grumman as qualified to help with their IPv6 transition.



Multiple responses were allowed, thus percentages add to more than 100%.

Q: Which of the following potential partners do you consider qualified to help with your IPv6 transition?

Contact Information

MARKET CONNECTIONS, INC.

Research You Can Act On

14555 Avion Parkway
Suite 125
Chantilly, VA 20151
703.378.2025

www.MarketConnectionsInc.com
@mkt_connections