

U.S. Government Systems Integrator Survey Results



U.S. GOVERNMENT AGENCIES' VIEWS ON HSPD-12

SIs report HSPD-12 receives varying degrees of prioritization within the federal agencies with which they do business:

High priority	30%
Mid-level priority	47%
Not a priority	23%

Respondents believe a minority of federal agencies they do business with view HSPD-12 as an opportunity to lay the foundation for longer-term identity and access management initiatives:

Most federal agencies	11%
More than half of the federal agencies	23%
A few federal agencies	48%
No federal agencies	18%

SIs also report that federal agencies have mixed views on the potential for HSPD-12 compliance to drive overall security improvements in terms of helping to better manage physical and logical access:

Most federal agencies	27%
More than half of federal agencies	41%
A few federal agencies	20%
No federal agencies	11%

Those surveyed report mixed perceptions among federal agencies regarding the effectiveness of HSPD-12:

Viewed by agencies as well developed and will be highly effective	20%
Viewed by agencies as somewhat well-developed and will be moderately effective	64%
Viewed by agencies as poorly developed and will be ineffective	16%



CHALLENGES POSED BY HSPD-12

SIs surveyed have been challenged in identifying funding sources for HSPD-12 efforts:

Have identified funding	18%
Have not identified funding	48%
Have not identified funding, but expect to soon	34%

More than half of those surveyed have not yet identified the necessary components that will make up the HSPD-12 solution:

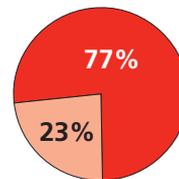
Already identified	40%
Not yet identified	60%

ABOUT THE SURVEY

In March 2006, RSA Security surveyed systems integrators (SIs) responsible for supporting U.S. federal government agencies with technology implementations. The goal of the survey was to gauge SIs' perceptions related to Homeland Security Presidential Directive 12 (HSPD-12) - a mandate requiring federal employees and contractors to use a new standard (FIPS 201) for physical and logical access by October 2006. This report reveals the perceptions of government SIs regarding a variety of issues related to HSPD-12.

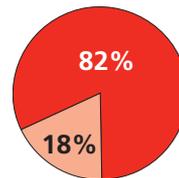
METHODOLOGY

RSA Security's HSPD-12 survey was conducted online between March 21 and March 31, 2006. Respondents were qualified as U.S.-based systems integrators responsible for supporting federal government agencies in technology implementations.



The vast majority of SIs believe an extension beyond the October 2006 deadline is needed in order for the federal government agencies to achieve FIPS 201 PIV-II compliance

In addition, SIs believe the requirement to handle real-time changes to access privileges poses a significant challenge as agencies strive to integrate physical and logical access



Real-time changes do pose a significant challenge

Real-time changes do not pose a significant challenge

Most SIs do not yet have migration plans to move non-compliant federal agencies to FIPS 201 compliance:

Do have migration plans 30% Do not have migration plans 70%

Those surveyed report mixed views on the single most difficult obstacle agencies/organizations face in meeting HSPD-12 requirements—but all agree that significant challenges exist:

Technology interoperability	18%
Physical / Logical Access control division within organizations	7%
Financial considerations (no funds specifically allocated)	7%
Timeline is too aggressive	5%
Standards and accreditation issues	9%
All of the above are equal obstacles	55%

The majority of respondents view lack of interoperability as the most significant challenge with regards to integrating physical and logical access:

Directories	9%
Lack of interoperability	59%
Political issues	25%
Financial considerations	7%



CONGRESSIONAL OVERSIGHT AND MANAGEMENT

SIs have mixed opinions regarding the need for the U.S. Congress to practice greater HSPD-12 oversight:

Greater oversight is needed	27%
Greater oversight is not needed	23%
Not sure/no opinion	50%

Survey respondents were also divided regarding the need to create an HSPD-12 line of business by the Office of Management and Budget:

Line of business should be created	34%
Line of business should not be created	14%
Not sure/no opinion	52%



LOOKING BEYOND THE GOVERNMENT SECTOR

More than half of the SIs surveyed report that their company is investing to prepare for potential revenue opportunities that may emerge if commercial organizations begin to embrace the HSPD-12 construct:

Are investing 57% Are not investing 43%

For organizations which are making such investments, the majority are investing less than \$500,000:

\$0 - \$500,000	59%
\$500,000 - \$1,000,000	19%
More than \$1,000,000	22%

Looking beyond HSPD-12, SIs believe that identity and access management, with respect to Information Sharing, will be the next major identity-related challenge that U.S. federal agencies will need to tackle:

E-authentication	27%
Identity & access management with respect to information sharing	50%
Remote authentication (for contingency planning, disaster recovery, telework, etc.)	23%

