

IDC MarketScape

IDC MarketScape: Worldwide Security Solutions and Services Hardcopy 2022–2023 Vendor Assessment

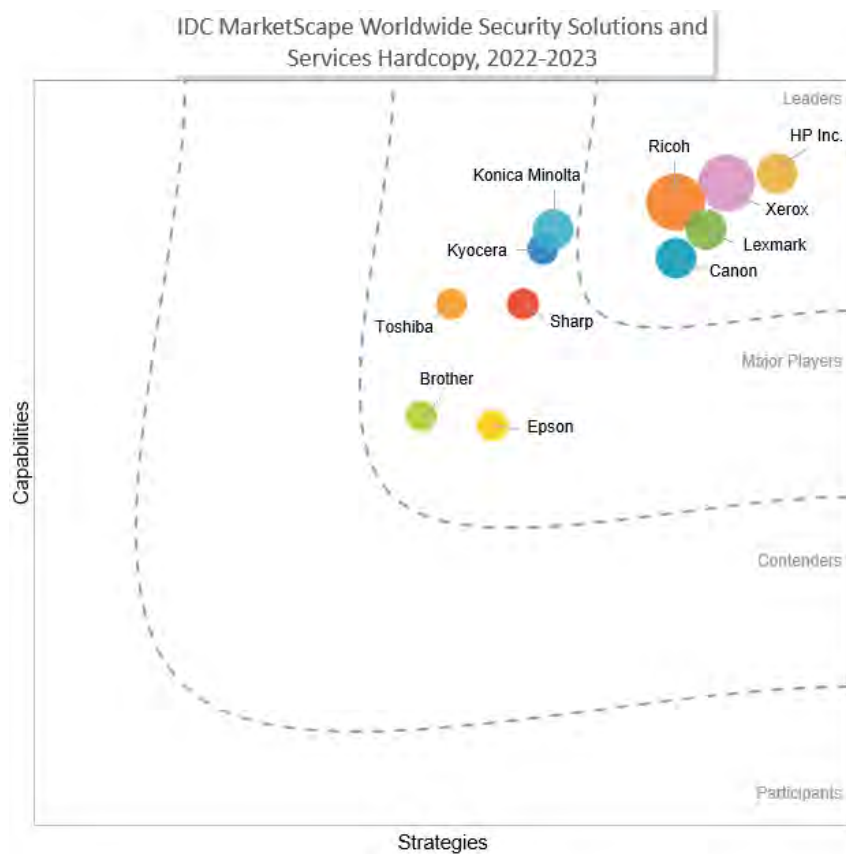
Robert Palmer

THIS IDC MARKETSCAPE EXCERPT FEATURES HP

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape Worldwide Security Solutions and Services Hardcopy Vendor Assessment



Source: IDC, 2023

Please see the Appendix for detailed methodology, market definition, and scoring criteria.

IN THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Worldwide Security Solutions and Services Hardcopy 2022–2023 Vendor Assessment (Doc # US48851622). All or parts of the following sections are included in this excerpt: IDC Opinion, IDC MarketScape Vendor Inclusion Criteria, Essential Guidance, Vendor Summary Profile, Appendix and Learn More. Also included is Figure 1.

IDC OPINION

This IDC study assesses the market for print and document security solutions and services among select hardcopy vendors through the IDC MarketScape model. This assessment discusses both quantitative and qualitative characteristics that position vendors for success in this important market. This IDC MarketScape covers a variety of hardcopy vendors and is based on a comprehensive framework to evaluate security delivered as standalone features and solutions, within the context of managed print and document services (MPDS) engagement, and as non-MPDS professional and managed services. Many hardcopy manufacturers offer print and document security solutions and services as a way of sustaining value for existing managed print and document services customers, though they are also developing practice areas that are independent of (or adjacent to) their managed services offering. Organizations using the IDC MarketScape for print and document security can identify vendors with strong offerings and well-integrated business strategies aimed to keep the vendors viable and competitive over the long run. Capabilities and strategy success factors identified from this study include:

- Current solutions portfolio, device-level features, managed services, professional services, and other capabilities to address security concerns in the print and document infrastructure
- Ability to address core competencies in threat-level assessment, detection, and risk remediation
- Road map to address specific end-user challenges related to securing the print and document infrastructure
- Capabilities and strategies to help customers achieve and sustain security compliance and meet key industry standards
- Capabilities and strategies to help customers determine how to best approach securing the print environment within the constructs of a zero trust security framework
- A holistic approach to delivering horizontal and vertical security solutions and services through both direct and indirect channels
- A focus on operational and service delivery excellence, which includes consistent service delivery on a local, regional, and global basis
- Capabilities and strategies to address specific security challenges associated with security in the hybrid working model, including transition to cloud-based print and print infrastructure
- Continued expansion into new geographic territories, vertical industries, and line-of-business applications
- Flexible service delivery, pricing, and billing models and the ability to support on-premises, private, and public cloud offerings

IDC MARKETSCOPE VENDOR INCLUSION CRITERIA

This research includes analysis of 11 prominent hardcopy equipment manufacturers with broad hardware portfolios to specifically address office workgroup/departmental printing environments on a global scale. The vendor must offer a large portfolio of standalone security solutions and services while dedicating a significant percentage of total R&D spend to the category. Excluded from the study were IT outsourcing companies, business process outsourcing (BPO) providers, and software manufacturers that either offer print, document, and security services as part of their IT services or subcontract those services to hardcopy vendors. Indirect channel partners of the hardcopy equipment manufacturers have also been excluded from this study.

ADVICE FOR TECHNOLOGY BUYERS

Security remains a top priority among businesses of all sizes. Historically, however, print security initiatives have lagged similar programs aimed at securing the overall IT environment. Many CISO's and IT managers have assumed that systems put in place to protect the network would extend to other connected peripherals. But security around the network perimeter is crumbling, and every device connected to the network is now an endpoint security risk, printers and MFPs included.

The result of a security breach to the print and document infrastructure is the same as that of any other security lapse: extensive costs related to downtime to identify and fix a security breach, fines associated with corporate governance and regulatory compliance, lost customers, or other harmful damage done to the company's reputation. In today's business world, the IT infrastructure is only as secure as its weakest link, and for many businesses, the print and document infrastructure is one of the most vulnerable to security risks.

Meanwhile, workforce dynamics have changed due to the COVID-19 pandemic, raising a whole new set of security concerns. The shift toward hybrid working is accelerating the push toward a zero trust security model, driven by the need to support remote users, cloud-based applications, and outside assets. It is basically no longer safe or even feasible to assume that everything that sits behind the corporate firewall is protected. Instead, each request must be treated as though it originates from an open network. As a result, a holistic approach must be taken when developing a print security strategy for today's business environment.

Accordingly, organizations should consider the following:

- **Print security in the hybrid world.** Few organizations have provided guidance to remote employees when it comes to the procurement and use of printers. Some have advised employees to use their personal printing devices, while others allow employees to purchase new devices and reimburse printing expenses later. This lack of uniformity across the organization poses significant security risks and must become a focal point for IT and security managers.
- **Balancing convenience, productivity, and security.** Organizations are now in the difficult position where they must provide a printing experience that is consistent and convenient for employees while ensuring that remote printers and MFPs are in line with the necessary corporate compliance and security policies. A recent IDC study shows that 43% of respondents cite security vulnerabilities and the ability to ensure that at-home print devices are compliant with corporate governance and security policies as a top challenge.

- **Integrating print security within the context of your overall IT security strategy.** Develop a long-term plan that includes measures for ongoing monitoring and management of print and document security programs. Vendors offer an expanded array of device- and data-level protection services, many of which are designed to integrate with existing document management and business systems to provide further protection and to address governance and regulatory compliance issues.
- **Extending on-campus print security tools to include remote locations.** From a print management perspective, companies are challenged with monitoring and managing devices remotely. Traditional features of print management software including rules-based printing, secure printing, job tracking, and accounting are still essential for businesses to gain better visibility into print usage, particularly with a hybrid workforce where devices are often not visible and usage patterns are not so easily monitored.
- **Looking to your existing hardcopy vendors.** When evaluating print and document security needs, ensure your existing hardcopy vendors are included in the mix. These vendors likely have a compelling set of security solutions and services with a clear road map for incorporating technologies to meet evolving business needs.
- **Identifying industry-specific capabilities.** Security needs and regulatory compliance issues vary greatly by vertical market. Seek out vendors with core competencies in print and document workflow, content management, and secure print services that meet the needs of your specific business.
- **Zero trust.** Organizations should consider what might be required for including print within a zero trust security framework. Specific tools and technologies might be needed to ensure secure print workflows, such as secure application development, cloud-based pull printing, device certificates, layered device capabilities, encryption, and multifactor authentication. Cloud-based printing and print management tools are likely to be viewed as a key enabler for those organizations looking to simplify the need to provide a consistent print experience for work-from-home (WFH) employees.

VENDOR SUMMARY PROFILES

This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of each vendor's strengths and challenges.

HP Inc.

HP Inc. is positioned in the Leaders category in this 2022-2023 IDC MarketScape for worldwide security solutions and services hardcopy. HP Inc. headquarters are in Palo Alto, California.

Quick facts about HP Inc. include:

- **Employees:** 51,000
- **Global market coverage:** North America, Latin America, Europe, Middle East and Africa, and Asia/Pacific
- **Top industry focus:** HP Inc. working with enterprise and SMB accounts across all vertical markets and geographies directly and through channel partners (including systems integrators)
- **Ideal customer size:** SOHO, SMB, upper midmarket, and enterprise

- **Services/solutions evaluated:** Print security solutions and services
- **Delivery models evaluated:** Delivered as embedded, device-level features; as standalone solutions; within the context of an MPDS engagement; and as non-MPDS professional and managed services
- **Key differentiator:** HP Inc. leading the charge over the past several years when it comes to raising awareness for print and document security (The now famous Wolf campaign was very successful in helping HP Inc. drive thought leadership while providing a mechanism for engaging with customers in deeper conversations on the need for security. Security remains a priority for HP Inc., serving as the foundation for its approach to the market and the backbone for its secure MPS strategy. HP Inc.'s legacy of print security innovation combined with the company's ability to leverage and share security technologies and best practices across HP Inc.'s print and PC businesses is also an important differentiator.)
- **Interesting fact:** HP Inc.'s Wolf IV marketing campaign, which brought attention and awareness to the security risks of people working from home, that leveraged various traditional and social media channels for a total reach of more than 11.6 million viewers

Strengths

- **Solutions portfolio:** HP Inc. continues to expand its suite of print and document security solutions, which is based on a mix of owned technology and partner-delivered capabilities. These solutions support a broad range of security features and functionality, delivered in the form of services, integrated software, or apps that can be downloaded and run directly from the MFP. HP Inc.'s flagship product, HP Security Manager, provides customers with a robust, security-focused, and fleetwide security policy compliance and management tool with a fully enabled platform for managing device and content security.
- **Zero trust:** Like many vendors today, HP Inc.'s overall security strategy is rooted in the movement toward a zero trust framework and the ongoing need to ensure secure printing in the hybrid working model. For HP Inc., however, zero trust is not just about a checklist item for "strong" authentication or providing a simple end-to-end cloud printing capability. Instead, HP Inc. considers modern authentication in a holistic way, which involves more complex issues such as user experience, support for evolving standards, and the gradual shift away from passwords. In addition, HP Inc. considers the control plane – the active management and monitoring of device endpoints in environments that operate away from the traditional corporate network environment. Finally, HP Inc.'s zero trust framework considers how data is secured at the device – once it has left the device, where it is stored, how data is transmitted, and who retains possession of the data across the life cycle.
- **The customer journey:** HP Inc. understands that few customers will make the leap to a fully implemented zero trust environment. Instead, the journey will be different for every customer. HP Inc. considers the entire cybersecurity landscape with its approach to print and document security, deploying a customer-centric model to identify specific business needs and priorities based on the "security mindset" of the customer. HP Inc. continues to group customers into three primary segments based on their maturity levels: security familiar, security aware, and security insistent. Bringing together the expertise, experience, and professional services of its PC and print businesses, HP Inc. can provide an implementation path that allows customers to engage and progress as needs evolve.
- **HP Managed Print Cloud Services (MPCS):** HP Inc. offers an array of professional and managed services, including managed print services, cloud and network services, and a range of IT services. HP Inc.'s portfolio also includes security-based services that begin with an extensive set of security assessment tools and move all the way through to security

implementation, ongoing monitoring and management, and remediation. Like most vendors, HP Inc. is focused on delivering cloud-based print services to help customers improve security and modernize print infrastructures. With HP Managed Print Cloud Services, HP Inc. can take over the entire print infrastructure for clients and manage it for them. For those customers looking to shift resources to other value-add strategic initiatives and move to a more flexible and scalable model for print and IT, MPCS provides a significant return on investment.

Challenges

- **Differentiating customers and services:** HP Inc. offers a vast array of print-related services for customers of all types and sizes. As a result, it can sometimes be difficult for customers to determine which service is best for them. IDC believes that HP Inc.'s overall services strategy could be improved with greater emphasis on communicating which services are best applicable based on the company's own set of user/customer definitions and experience.
- **Channel enablement:** While the company continues to make strides with its indirect channel, HP Inc.'s overall go-to-market strategy could also be improved by further enabling channel partners to sell and support the company's security offerings on a broader scale to the SMB market.

Consider HP Inc. When

Organizations should consider HP Inc. when looking for a vendor that can provide an end-to-end view of security vulnerabilities, when security is viewed as critical to business outcomes, and when print security needs to be considered as part of a larger overall IT security effort. HP Inc. should also be on the short list when customers are seeking a trusted partner for dealing with emerging issues around security in the hybrid work model, understanding how print security fits within a zero trust framework, and understanding how cloud-based technologies can be leveraged to achieve a more secure and modern print infrastructure.

APPENDIX

Reading an IDC MarketScape Graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis, or strategies axis, indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represents the market share of each individual vendor within the specific market segment being assessed.

IDC MarketScape Methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

Market Definition

For the purposes of the 2022-2023 IDC MarketScape for worldwide print security services, IDC defines print and document security as "solutions and services to address security concerns in the print and document infrastructure, including device-level features and capabilities, software solutions, or professional and managed services with core competencies in threat-level assessment, detection, and remediation capabilities."

This IDC MarketScape evaluates measures for both device-level endpoint security and protection of data/content. Capabilities include, but are not necessarily limited to:

- Identity and access management
- Encryption policies and best practices
- Device malware protection
- BIOS, operating system, and firmware updates and password management
- Hard disk and removable storage media
- Antivirus, antimalware/spyware
- Security event management
- Round-the-clock monitoring and management of intrusion detection systems and firewalls
- Overseeing patch management and upgrades
- Performing security assessments and security audits
- Content security, privacy, and data integrity (hardware and software)
- Installation, configuration, and usage of equipment
- Remote, BYOD, and mobile printing

Security solutions offered by hardcopy vendors could include any combination of software, hardware, and managed or professional services.

Security services could include consultancy and implementation services (professional and managed), including print and document security assessments and audits; security event and policy management; ongoing monitoring and management of intrusion detection systems and firewalls; overseeing patch management and upgrades; content security, privacy, and data integrity (data at rest and data in transit); installation, configuration, and usage of equipment; and secure systems for remote, BYOD, and mobile printing. Integration with legacy business systems and support for current and future regulatory compliance policies are also considered.

Related Research

- *IDC FutureScape: Worldwide Imaging, Printing, and Document Solutions 2023 Predictions* (IDC #US49751022, October 2022)
- *Market Analysis Perspective: Worldwide Next-Gen Document Services, 2022* (IDC #US49326522, August 2022)
- *Worldwide and U.S. Managed Print and Document Services and Basic Print Services Forecast, 2022-2026* (IDC #US47975222, July 2022)
- *Worldwide and U.S. Managed Print and Document Services and Basic Print Services Market Shares, 2021: Hybrid Work Drives Cloud Adoption* (IDC #US48532922, July 2022)
- *Enabling a New Print Services Model for the Hybrid Workforce, Part 3: Security and Zero Trust* (IDC #US49104022, May 2022)

Synopsis

This IDC study assesses the market for print and document security solutions and services among the most prominent global hardcopy vendors and identifies their strengths and challenges. This assessment discusses both quantitative and qualitative characteristics that position vendors for success in this important market. This IDC study is based on a comprehensive framework to evaluate security delivered as standalone features and solutions, within the context of an MPDS engagement, and as non-MPDS professional and managed services.

"Organizations need help understanding how hybrid work models will impact print and document security," says Robert Palmer, research vice president for IDC's Imaging, Printing, and Document Solutions group. There are many security vulnerabilities associated with the print ecosystem that will only be exacerbated when remote devices are brought into the mix, and proper consideration needs to be given to issues such as endpoint security, data protection, and zero trust policies.

About IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications and consumer technology markets. IDC helps IT professionals, business executives, and the investment community make fact-based decisions on technology purchases and business strategy. More than 1,100 IDC analysts provide global, regional, and local expertise on technology and industry opportunities and trends in over 110 countries worldwide. For 50 years, IDC has provided strategic insights to help our clients achieve their key business objectives. IDC is a subsidiary of IDG, the world's leading technology media, research, and events company.

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