MARKET NOTE

Vendor Snapshot 2017: HP Inc. on Print and Document Security Services

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EXECUTIVE SNAPSHOT

FIGURE 1

Executive Snapshot: Vendor Snapshot 2017 — HP Inc. on Print and Document Security Services

This IDC Market Note provides a summary of HP Inc.'s recent briefing and demonstration with IDC on its print and document security solutions and services offerings. The document looks closely at HP Inc.'s print and document security offerings portfolio, go-to-market strategy, and snapshot of how the firm is positioning itself for continued growth in this area.

Key Takeaways

- HP Inc.'s approach to security takes the entire print and document infrastructure into account, beginning with locking down the device and extending into all aspects of device usage and content protection.
- HP Inc.'s expansive suite of print and document security solutions is based on a mix of owned technology and partner-delivered capabilities that deliver security in four primary areas: HP JetAdvantage Security Manager, pull printing solutions, data protection, and security services.
- HP Inc. is leading the charge among all hard copy vendors around raising awareness and visibility for print and document security concerns.
- The ability to tap into security solutions deployed through its personal systems business is a significant strength for HP Inc., providing consistency in the technology stack and facilitating an integrated security strategy across the entire IT infrastructure.

Source: IDC, 2017

IN THIS MARKET NOTE

This IDC Market Note provides a summary of HP Inc.'s recent briefing with IDC on its print and document security solutions and services offerings. This document looks closely at HP Inc.'s print and document security strategy and provides a snapshot of how the firm is positioning itself for continued growth in the global market for providing secure devices, solutions, and services.

Offering Strategy

HP Inc.'s approach to security takes the entire print and document infrastructure into account, beginning with locking down the device and extending into all aspects of device usage and content protection. At the device level, HP Inc. leverages a mix of embedded capabilities and solutions-enabled protection to address all facets of endpoint security, which the firm refers to as securing the entire technology stack.

Features such as BIOS protection (through HP Sure Start technology), TPM modules, firmware whitelisting, runtime memory monitoring and malware protection, automatic remediation through secure reboot, data encryption, and integration with remote monitoring tools provides a multilayered approach for device protection that is unmatched in the industry. Meanwhile, HP Inc.'s expansive suite of print and document security solutions is based on a mix of owned technology and partner-delivered capabilities that deliver security in four primary areas: HP JetAdvantage Security Manager, pull printing solutions, data protection, and security services.

HP JetAdvantage Security Manager

HP JetAdvantage Security Manager enables customers to develop a comprehensive print security policy, assess and remediate devices against that policy, and provide audit and reporting measures based on predefined guidelines. HP Inc. recognizes that customers need to manage security for their printers and MFPs in the same way that they manage other IT assets, such as PCs, laptops, tablets, and other network devices. HP JetAdvantage Security Manager provides an automated way for administrators to manage device security and settings and provides a layer for systems and SIEM tool integration. HP JetAdvantage Security Manager also provides businesses with compliance and governance capabilities for managing security policies of the entire device fleet.

Pull Printing Solutions

HP Inc. sells a broad range of pull printing solutions designed to meet the needs of specific customer environments. HP Access Control (HP AC) combines job accounting, authentication, end-to-end encryption, and pull print functionality, while offering mobile release and a recessed card reader on the device to support proximity card usage. Pull print functionality can be delivered through a variety of models, including standard pull print using an enterprise spooler, client-based pull print, email send submission, and pairing with HP JetAdvantage Connect to enable native mobile printing.

To support firmware management, HP Inc. has developed a tool that links to internal HP Inc. databases and provides a complete dashboard view of the customer's fleet for patch management – identifying firmware in the customer's print environment that may have associated security bulletins.

HP Inc. also supports various partner-delivered solutions that provide similar authentication and pull print capabilities, such as Nuance's SafeCom and Equitrac, Celivio, and Pharos Blueprint. HP Inc. is also able to support other third-party ISV pull print solutions through its JetAdvantage Partner program. A portfolio of cloud-based pull print solutions, such as Private Print, deliver many of the same security

capabilities of traditional pull print, but in a multitenant public cloud infrastructure. Finally, HP Inc. also launched JetAdvantage Secure Print as a more robust pull print solution that offers identity management integrations, device authentication, and multivendor support.

HP Data Protection

HP Inc. offers a suite of data protection solutions designed to detect and prevent data loss through print devices. The HP Access Control Data Loss Prevention module uses custom keywords and data patterns to deter data breaches flowing through the print stream and can prevent print jobs or alert system administrators or IT managers in real time. HP Secure Content Management and Monitoring provides similar functionality covering print, copy, scan, and fax streams. This solution captures all documents passing through the device and records critical information so that IT administrators can control usage rights and print behavior.

HP Security Services

Leveraging its broad solutions portfolio, HP Inc. offers a broad set of security-based services, beginning with its Security Audit Advisory Service. This service provides an in-depth assessment of the organizations' current infrastructure and provides recommendations for advancing security measures consistent with existing corporate policies.

HP Inc. stresses that its security assessments address issues well beyond device settings to look at managing overall device and content protection. HP Inc. has developed a security assessment framework for interrogating customers on a wide variety of security control points, consistent with other IT endpoint security assessments and methodologies. Through this process, HP Inc. applies industry standards and control points and maps those to the customer's printing infrastructure and business processes to ensure best practices and design a security strategy that is linked to the company's internal security policies and governance.

HP Inc.'s Implementation Service is designed for those customers with limited resources and expertise to execute against the plan developed from the security assessment. Essentially, HP Inc. deploys resources in the form of tools and technical advisors to implement the security policies at a fleet level, speeding up the process for clients with limited internal capabilities.

HP Inc.'s Advisory Retainer Service is basically an ongoing security service to reassess and optimize the environment every six months. HP Inc. can rely on its system tools and SIEM integrations to provide reports and assistance with remediating security breaches. Finally, with its Governance and Compliance Service, HP Inc. works with customers to maintain security policies and commit to delivering up to 99% compliance with current security policy.

HP Inc. offers its security services as standalone programs, but its entire portfolio of security solutions and services is also available through HP Inc.'s managed print services (MPS) offerings. HP Inc. has established a formidable managed print services practice that includes security as a backbone and is foundationally built on investments it has made in its "as a service" global infrastructure. In fact, HP Inc. markets its MPS programs as "Secure MPS," part of which is simply marketing but it also points to core capabilities that have become standard security components in HP Inc.'s MPS arsenal. As part of standard MPS, for example, HP Inc. has firmware update and password management services to assist customers with day-to-day security management of devices in the fleet.

HP Inc. is careful to point out that its strategy involves much more than a portfolio of solutions and services. Recognizing that customers need help in creating an overall print and document security

strategy, HP Inc. understands that it must bring the right people into the conversations – from both the customer side and HP Inc.'s side. Over the past two years, HP Inc. has put extensive efforts into hiring and training the appropriate technical experts to create a panel of certified security advisors that can speak first to issues regarding security, addressing industry and geographic requirements before addressing the print environment.

Go-to-Market Strategy

HP Inc. sells its security solutions and services both direct and through its expansive network of indirect channel partners, which it says now numbers over 300,000 globally. HP Inc. is making significant investments in go-to-market initiatives for both channels in the form of marketing campaigns and other outreach programs as it seeks to gain insight into client needs and the industry's that they serve. HP Inc. also emphasizes the role that its channel partners can play as crucial to its overall security strategy, either as a conduit to the end customer or by assisting partners in the delivery of their own services through the solutions that HP Inc. brings to the market.

Specific to its security strategy, HP Inc. is focusing its marketing efforts in three specific areas: endpoint security, security innovation, and developing awareness around risks and threats related to print and document security. HP Inc.'s "Wolf" campaign, which has received significant public reaction and industry praise, is an example of the firm's commitment to such high-profile marketing programs. HP Inc. believes it is in a unique position to carry these messages forward and to drive thought leadership around the topic of printers as an endpoint security threat. HP Inc. sees its innovation in print as being encompassed in its solutions and services strategy and it is looking to communicate those advantages to the market clearly and distinctly.

HP Inc. is also making investments in both horizontal and vertical messaging. Traditionally, HP Inc. has targeted IT managers and users with its broader print messages with the intent of migrating up to the line of business (LOB). But with its security marketing and messaging, HP Inc. is looking specifically to influence the chief information security officers (CISOs); those who can reshape and make decisions about improving the security infrastructure. HP Inc. is also working on channel-specific marketing tools and assets focused on security, including comarketing activities around various channel events. Key target verticals for HP Inc. include healthcare, financial services, insurance, legal, manufacturing and distribution, communications/media/entertainment, government, and education.

IDC'S POINT OF VIEW

HP Inc. is leading the charge among all hard copy vendors around raising awareness and visibility for print and document security concerns. The Wolf videos really illustrate HP Inc.'s commitment to elevating awareness and demonstrating the risks and possible consequences of an insecure print environment. On the other hand, the Wolf campaign is only part of an overall strategy from HP Inc. to move security to the forefront of its imaging and printing business. Indeed, HP Inc. now promotes itself as having the most secure printers in the world. Additional investments are planned, some of which leverage innovations from HP Labs.

HP Inc. must prove itself in this regard, but its solutions and services portfolio combined with investments made in its overall security ecosystem are quite impressive. HP Inc. is also in a unique position, in that it must strike a proper balance between promoting itself as the number 1 secure print provider while raising its profile as a prime target for hackers who might want to infiltrate the market's self-proclaimed leader. To its credit, HP Inc. argues that everyone is vulnerable these days, but it feels

it must lead the way in helping clients understand and address those vulnerabilities. HP Inc. recently announced the formation of a Security Advisory Board to solicit help from hackers and other security experts to stay ahead of cybersecurity threats. Raising awareness comes with some inherent risk, but the potential benefits to HP Inc. and its clients likely far exceed the potential results of simply ignoring the problem.

The ability to tap into and integrate with security solutions deployed through its personal systems business is also a significant value-add for HP Inc. Indeed, HP Inc.'s IT backbone has always been viewed as a strong component of its overall managed print and workflow services offerings. Vendors with strong IT services and capabilities have a distinct advantage because it enables scalability and integration in the workflow arena, provides consistency in the technology stack, and facilitates a comprehensive and integrated security strategy across the entire IT infrastructure. HP Inc.'s security narrative combined with its go-to-market unison between PCs and print help set it apart from competitors.

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Related Research

- *IDC MaturityScape Benchmark: Print and Document Management in the United States, 2017* (IDC #US41265117, July 2017)
- *Worldwide and U.S. Device and Print Management Market Shares, 2016: Navigating an Evolving Market* (IDC #US41266017, June 2017)
- *Worldwide and U.S. Managed Print and Document Services and Basic Print Services Forecast, 2017-2021* (IDC #US41264717, May 2017)
- *Worldwide and U.S. Managed Print and Document Services and Basic Print Services Market Shares, 2016: Growth in the Midmarket* (IDC #US41264817, May 2017)

Synopsis

This IDC Market Note looks at HP Inc.'s current product offerings, go-to-market strategies, and opportunities moving forward within the print and document security space. This document looks closely at HP Inc.'s print and document security strategy and provides a snapshot of how the firm is positioning itself for continued growth in the global market for providing secure devices, solutions, and services.

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