IDC MarketScape: Worldwide Security Solutions and Services Hardcopy 2019–2020 Vendor Assessment

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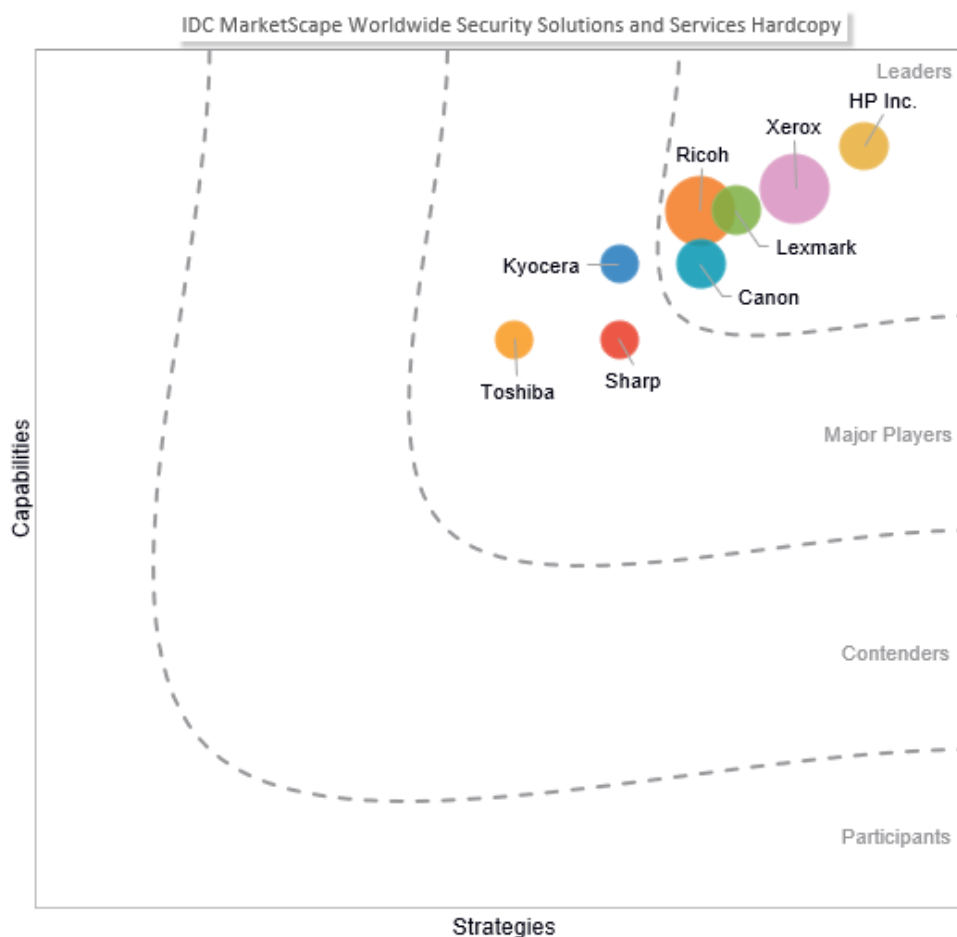
THIS IDC MARKETSCAPE EXCERPT FEATURES RICOH

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape Worldwide Security Solutions and Services Hardcopy Vendor Assessment

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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 2019-2020 Vendor Assessment (Doc #US44811119). 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 a 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 solutions and services 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
- A holistic approach to delivering horizontal and vertical security solutions and services through both direct and indirect channels
- Focus on operational and service delivery excellence, which includes consistent service delivery on a local, regional, and global basis
- 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 MARKETSCAPE VENDOR INCLUSION CRITERIA

This document includes an analysis of eight prominent hardcopy equipment manufacturers with broad hardware portfolios to specifically address office workgroup/departmental printing environments on a global scale. Vendors must offer a large portfolio of standalone security solutions and services while dedicating a significant percentage of total R&D spend to the category. Given this approach, certain print and imaging vendors have been excluded even though they are among the top printing hardware firms based on worldwide revenue. Also 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 these services to hardcopy vendors. Indirect channel partners of hardcopy equipment manufacturers have also been excluded from this study.

ADVICE FOR TECHNOLOGY BUYERS

Security remains an IT concern among businesses of all sizes. However, IDC's research shows that a majority of organizations place a notable difference on the level of importance associated with IT security compared with print and document security. Many CISOs 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. Even so, there is an interesting dichotomy associated with the office MFP. On the one hand, the connected MFP is a potential threat as an unmanaged connected device. On the other hand, the MFP could be leveraged as a frontline asset for securing network access, managing content security, and protecting access to information. Steps that should be taken to develop a secure print strategy have proven difficult for many businesses.

Accordingly, organizations should consider the following:

- **Determine the level of complexity expected for print and document security over the next three years.** Features designed to provide endpoint security protection for printing devices continue to become more commonplace. However, organizations looking to develop a comprehensive print infrastructure security strategy should seek out solutions and services to extend protection well beyond the device.
- **Understand your current environment.** Evaluate the existing print and document infrastructure to identify security threats and vulnerability gaps. To do so, organizations should consider adoption of security auditing and assessment services as part of an overall IT security strategy.
- **Integrate 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 enterprise content management (ECM) systems to provide further protection and to address governance and regulatory compliance issues.

- **Look 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.

- **Identify 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.

- **Consider your organizational needs regarding service delivery.** This may include the need to support cloud-enabled services, platform as a service, and global consistency in solutions and services delivery.

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 the vendor's strengths and challenges.

Ricoh

Ricoh Company Ltd. is positioned as a Leader in the 2019-2020 IDC MarketScape for print and document security solutions and services worldwide.

Ricoh was founded in 1936, and is headquartered in Tokyo, Japan. Ricoh's overall approach to the market is aimed at empowering digital workplaces with a focus on three core areas: transforming the way work is done in the office, digitizing frontline operations and improving workflows linked to the office, and helping resolve social issues through best practices in business. As a foundational pillar of this strategy, Ricoh strives to help organizations transform data from workflows into actionable business intelligence.

Ricoh's approach to securing the print and document infrastructure is built around what it calls the "CIA" principals of privacy and security: confidentiality, integrity, and availability. Ricoh works to ensure confidentially through a variety of methods, including secure print and document release solutions. Data encryption, authentication methods, and other technologies are utilized to ensure document integrity and prevent the unauthorized use and editing of content, both while in motion and at rest. To address content availability, Ricoh deploys technologies and services to enable secure access to information when and where it is needed.

Ricoh utilizes a layered approach to security, starting with embedded device-level protection and expanding outward to include security measures enabled through its smart operation panel, embedded applications, network protection, server security, and additional security services. Device-level protection begins with the fundamental design of Ricoh's smart MFPs, which utilize a proprietary operating system and Trusted Platform Module (TPM) to monitor for and remove malicious code and ensure the use of only approved components.

Ricoh provides extended security measures through a portfolio of solutions and apps, which includes a broad range of both Ricoh-developed solutions and integrated support for third-party applications. These

solutions fall across a broad range of capabilities, including enterprise content management, document management, and advanced capture solutions. In all cases, Ricoh works to further extend security measures through technologies such as data encryption, authentication, and active login controls. Streamline NX, for example, is Ricoh's flagship software for managing and monitoring Ricoh devices installed on a customer network. The software enables administrators to view or configure security settings for a standalone MFP or group of devices using prepackaged templates and custom parameters.

Ricoh has also worked to ensure data integrity and content protection for its cloud-based document management systems and solutions. Through the Ricoh Smart Integration (RSI) platform, Ricoh has delivered a new solution to process documents in the cloud. Documents can be transmitted through Ricoh Smart Integration from one source to a destination using state-of-the-art security measures to ensure communication and storage are encrypted. Access to the cloud services require an authentication, and Ricoh offers multifactor authentication. Ricoh has also partnered with Cisco to offer a range of security solutions to further address cloud security, network security, and device-level protection.

Leveraging its broad solutions portfolio, Ricoh offers an extensive array of end-to-end IT security services. These include professional and managed services designed to help businesses manage everything from proactive device security and policy management to the removal and disposal of printing hardware. Ricoh also provides several advanced security services including vulnerability assessments, cybersecurity risk assessments, external penetration testing, and security and compliance consulting.

Strengths

Ricoh utilizes a services-led value proposition and follows a five-stage approach for delivering security services to the broader market. Initially, Ricoh works to understand the business needs, identify existing assets, determine current threats and vulnerabilities, and uncover the long-term compliance risks. Once these foundational elements are understood, Ricoh moves on to identifying and addressing business needs.

Ricoh delivers a comprehensive set of print and document security offerings designed to address the entire print and document infrastructure. Ricoh sets itself apart from its competitors with its consistent global delivery model and customer-driven approach, which enables the firm to provide a portfolio of solutions and services designed to address customer pain points and buyer needs across all verticals and company sizes.

Ricoh's strategic partnerships and acquisitions, such as the company's recent acquisition of DocuWare, continue to strengthen Ricoh's digital workplace strategies. The DocuWare acquisition enhances Ricoh's portfolio with the company's own cloud-based digital content service solution and extends Ricoh's reach to SMBs, both regionally and across vertical markets. Overall, Ricoh's deep industry expertise, managed services capabilities, and alignment with customer demand continue to position Ricoh as a leader in providing offerings to address security in the print and document environment.

Challenges

IDC believes that Ricoh's marketing strategies could be improved through increased campaigns specific to print and document security to drive market awareness and thought leadership. In addition,

Ricoh's overall delivery strategy could be strengthened through continued efforts to enable the company's channel partners to sell security solutions and services to the broader market.

Consider Ricoh When

Organizations should consider Ricoh when looking to deploy print and document security as part of a broader initiative to drive digital workflows and process optimization. Ricoh should also be on the short list of vendors for those companies looking to engage with a strategic partner to develop long-term security initiatives that can grow and expand as organizational needs and priorities evolve.

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 managed print and document services (MPDS) market.

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 a review board 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 2019 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:

- User authentication and authorization
- Device management
- Device malware protection
- BIOS, operating system, and firmware updates and password management
- Hard disk and removable storage media protection
- Antivirus and 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 and 3D Printing 2020 Predictions* (IDC #US45586119, October 2019)
- *Market Analysis Perspective: Worldwide and U.S. Next-Gen Document Services, 2019* (IDC #US44634019, September 2019)
- *Worldwide and U.S. Managed Print and Document Services and Basic Print Services Market Shares, 2018: Why the Channel Matters* (IDC #US43832819, July 2019)
- *Worldwide and U.S. Managed Print and Document Services and Basic Print Services Forecast, 2019-2023* (IDC #US45237919, July 2019)

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.

"Security within the print and document infrastructure continues to be problematic for most organizations," says Robert Palmer, research vice president for IDC's Imaging, Printing, and Document Solutions group. "Hardcopy vendors have demonstrated great strides in helping businesses address these vulnerability gaps, from providing embedded device-level protection to extended services for controlling access to content, managing user behavior, protecting business-critical information, and managing ongoing adherence to corporate security policies."

About IDC

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