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InfoTrends is the leading worldwide market research and strategic consulting firm for the digital imaging and document solutions industry. We provide research, analysis, forecasts, and advice to help clients understand market trends, identify opportunities, and develop strategies to grow their businesses. Additional information about InfoTrends is available on the Web at www.infotrends.com.

Secured Office Printing & Document Workflow: A Multi-Client Report

- The current state of secured printing in the office environment
- Key trends and expected developments
- Solutions described
- Vendors profiled
- Current and potential users surveyed

Prospectus

Who Should Subscribe?

- *ISVs*
 - *Resellers*
 - *Workgroup printing/scanning/copying equipment OEMs*
 - *IT*
 - *Document solutions developers/providers*
 - *High-volume users of documents requiring security features*
 - *Current and prospective practitioners of secure printing*
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Introduction

Legislation such as Sarbanes-Oxley, Gramm Leach Bliley, and HIPPA have greatly increased the potentially liability for security breaches, thus, putting security concerns at the forefront of IT department initiatives. According to research, a security breach can cost an organization anywhere from \$167,000¹ to \$4.8 million². Add this to the intangible costs of a loss in customer confidence, and the message is clear – securing every device that touches the network is critical, and this includes printers, copiers and scanners.

However, security of the imaging and printing environment has been given insufficient attention, and sometimes even ignored, by IT departments. Printers, copiers and scanners are considered appliances, posing none of the same risks as employee computers, network servers, and web facing applications. In fact, their likely connection to the Internet, their almost certain connection to the company's servers, and the increasing presence of hard drives and programs opens up many dangerous avenues for security breaches. Recent news of hacker groups infiltrating networked printers has raised awareness of the vulnerabilities these devices present, but as is usually the case employees are an even greater source of breaches, more often through negligence than intent. Too many organizations do not take even the rudimentary step of adequate password protection. A recently indicted fraudster obtained millions of dollars in fraudulent financing in part by entering the offices of large financial institutions and sending faxes from their equipment, usually succeeding even with password-protected devices by entering "password". These organizations were not merely embarrassed; they are being sued by the duped lenders. For all these reasons, a new focus is now being placed on securing ALL office equipment technology.

For providers of secure printing technologies, the heightened concern for data integrity and security represents new business opportunities. Secure printing solutions can be used as a competitive differentiator and a value-added option. For those looking to capitalize on this emerging opportunity a thorough understanding of the market drivers and customer behavior is necessary. InfoTrends is pleased to announce the release of a new multi-client study entitled "Secured Office Printing & Document Workflow: A Multi-Client Report," which will examine the market opportunity and provide insight and advice to vendors and document solutions providers looking to tap into the secured printing opportunity.

1 2006 CSI/FBI Computer Crime and Security Survey

2 Ponemon Report Shows Sharp Rise in the Cost of Data Breaches," Ponemon Institute, October 23, 2006

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Project Objectives

The overall goal of this new multi-client study is to help clients understand the status and prospect of secured printing, copying and scanning devices and related software for the office environment. The study will focus specifically on the hardware and software approaches, which are the keys to the effective control of printing, copying and scanning. With these considerations in mind, the study will:

Define 'secure printing'

- What separates secure from insecure printing?
- What are the major categories of documents or data that need to be secured from unauthorized printing?
- In which departments in companies do they typically reside (i.e. horizontal opportunities)?
- Are there particular industries with greater or particular secure-printing requirements (i.e. vertical opportunities)?

Estimate and forecast the size of the U.S. secure printing market

- Secured versus unsecured print/copy/scan devices
 - Segment by level of security
- Secured versus unsecured print volumes

Key Questions Answered by this Study

- Who is performing secured printing/copying/scanning, and why?
- Who should be performing it, but isn't?
- Who are the key vendors, and what are their offerings and relative sizes?
- What are the different levels of security?
- What are the key decision variables in choosing levels of security (including none)?
- What categories are growing fastest? Which are most profitable?
- What equipment is used?
- What is the role of software? What approaches are used?:
 - ISVs
 - IT consultancies
 - Hardware vendor software
 - Off the shelf
- What are the key market trends?
- What are the likely new developments in equipment or software?
- What to do about "print-and-run"?

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- Do you need to retroactively secure existing printers?
- Do all your printers need to be secure?
- Does your data need to be encrypted, and if so, at the printer or at the server?
- Do you need to log printing and audit the data?
- Will printers have an external connection, for faxes or for support?
- What ID features will be used?
- Will employee training be needed? From whom?
- Is additional middleware or custom programming needed?
- What vendor support will be needed?

Market Research

The study will include extensive review of existing research and interviews with technology vendors, users of secure printing technology, and print service providers across a variety of market segments. Ultimately, the research will identify market segments, critical success factors, customer requirements, usage patterns, purchase plans, and other items that will drive vendors' product, service, marketing, and sales activities.

Desk Research

To support the project, InfoTrends will conduct extensive desk research, in the process accessing a wide range of material and information sources. This information will be used to:

- Identify what the hardware OEMs offer
- Identify any third-party hardware modifications
- Identify the key vendors of software and solutions
- Identify and describe the available solutions
- Identify trends and drivers as reported in the trade press

In-Depth Vendor Interviews (10-15)

InfoTrends will conduct 10-15 in-depth interviews with managers at the solutions providing companies including ISVs and IT consultancies, hardware vendors, and resellers of secured printing technology. The interviews will be used to address the issues about applications, customers, software, equipment, print volumes, media handling, key drivers and trends, expected developments, and growth rates.

In-Depth Interviews with Practitioners of Secure Printing (5-10)

InfoTrends will also conduct 5-10 in-depth interviews with users of secured printing technologies in a variety of vertical markets including the healthcare, legal, accounting, pharmaceutical and manufacturing industries. The interviews will be used to understand:

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- Why and how users decide which applications need security
- Which security methods or mix of methods they use and why
- Criteria for selecting vendors of secured printing solutions
- What the key drivers and trends are
- What the expected developments will be
- Obtain insights that assist in determining growth rates.

Structured Survey of IT professionals (200)

InfoTrends will also conduct a structured survey of up to 200 IT professionals. Survey participants will be a mix of current users of secure printing and those who are considering or have recently considered secure printing implementation. Participants will also have to be decision-makers or a part of the decision-making in order to qualify. The survey will provide critical statistics and other quantifiable data on technology adoption, usage patterns, purchase plans, and sentiments on a range of secure printing business issues.

The structured survey, which will be developed with the advice and input of early subscribers to the study, will be configured to answer the following general questions based on the collective response:

- What is the level of awareness, and level of concern about, secure printing?
- What are their key issues/concerns?
- What level of security do they need?
- How many companies perceive a need for secure printing?
- What types of documents or printing need secure features, and why?
- To what vendors do they look for solutions?
- What solutions do the best job? Which are the most cost-effective?
- What are the prospects for growth in secure printing?

Analysis & Project Deliverables

InfoTrends will conduct extensive analysis of the desk research, in-depth interviews and structured surveys to develop a comprehensive understanding of the opportunities and issues for equipment vendors and service providers. Clients will receive a combination of report, presentation material, and research data for senior management, product managers and planners, and sales and marketing executives. The material will include:

- A detailed (100+ pages) report of the survey's findings and recommendations
 - o Executive summary
 - o Summary of all in-depth interviews with vendors and practitioners
 - o Charts of web-based survey results with explanatory text
 - o Market estimate and forecast for 2008-2013

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- o Profiles of key vendors
- Tabulations of results for all questions in the web-based survey
- A set of PowerPoint slides for subscribers' internal use
- An optional on-site presentation

Project Schedule

InfoTrends intends to start the project in July 2009. We plan to be complete the research by November 2009 and publish the report in December 2009. We will provide clients with interim data from the structured survey when that research is completed.

Sales process	through July
Desk research	August
Web survey	September/October
In-depth interviews	September/October
Analysis	November
Report	December

Terms and Conditions

Liability for Advice

Although reasonable efforts will be made by InfoTrends to ensure the completeness and accuracy of the information contained in written and oral reports in connection with the proposed study, no liability can be accepted by InfoTrends for the results of any actions taken by the client in connection with such information, opinions, or advice.

Copyrights

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Confidentiality

InfoTrends will use its best efforts to ensure that any confidential information obtained about the client and its business during the course of the proposed study is not, unless agreed otherwise in advance, disclosed to any third party without the prior written permission of the client. InfoTrends retains the right to re-use any non-proprietary information as part of its ongoing analysis of the office automation and printing and publishing industries.

Timely Delivery

InfoTrends will take all reasonable steps to ensure that the time scales called for by the proposed study are met in accordance with the agreed-upon schedule, but no liability can be accepted for the consequences of delays, howsoever caused.

Terms

One half of fee upon initiation and one half upon report delivery.

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Authorization Form

Secured Office Printing & Document Workflow: A Multi-Client Report

Clients who sign up before July 31, 2009 have a participation fee of \$11,995 and the opportunity to provide input and review the survey questionnaires. After July 31, 2009 the participation fee will be \$13,995. An optional personal presentation is available for an extra fee, plus direct travel expenses (if an on-site visit is required).

Clients may have other business units co-fund the study, review the questionnaires, and receive a copy of the report at no additional charge. InfoTrends invoices the first half of the fee upon initiation of the contract and the second half upon delivery of the report.

Please enter my order as follows (fax completed form to +1 781 616 2121):

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| <input type="checkbox"/> Personal presentation | \$2,000 plus travel expenses |

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