QUOCIRCA MARKET VIEW

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Managed Print Services

Reducing the complexity and cost of the print environment

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REPORT NOTE:
This report has been written independently by Quocirca Ltd.

During the preparation of this report, Quocirca has spoken to a number of suppliers involved in the areas covered. We are grateful for their time and insights.

This report was sponsored by a syndicate of vendors in the MPS space.

As enterprises recognise the costs associated with an uncontrolled printing environment, many are turning to specialist managed print services (MPS) providers. MPS services encompass the assessment, optimisation and management of the print environment. Increasingly, MPS providers are now adopting a partnered out-tasking approach by delivering flexible services that can be tailored to individual customer requirements.

- **The MPS market is characterised by services offered by both printer manufacturers and IT outsourcing services providers.** Although the market is dominated by offerings from printer manufacturers, IT outsourcing service providers are increasingly including MPS as part of their desktop management services.
- **Established and broad MPS portfolios are offered by manufacturers such as Xerox, HP, Canon and Lexmark.** These vendors all offer a robust set of services covering assessment, planning, implementation, management and ongoing maintenance and support for a multivendor environment. Canon, HP and Lexmark in particular, adopt a flexible co-operative approach to delivering MPS. Xerox's extended capabilities in offering document outsourcing and business process services currently position it as the vendor with the strongest global offerings in the MPS space. This has been helped by its global partnership with EDS, although the recent HP acquisition of EDS will, no doubt, impact Xerox's partnership whilst enabling HP to gain a new channel for pushing its MPS offerings.
- **IT outsourcing service providers are positioning MPS as part of their green IT services.** Accenture, CSC and Atos Origin are leading with a green approach. Printer vendors should look for opportunities to gain access to new clients by establishing deeper alliances with such IT providers. With enterprises increasingly interested in sustainability issues, MPS can deliver clear environmental benefits through reduced paper and energy use.
- **Assessments underpin a successful MPS.** Most IT outsourcing engagements begin with an initial assessment of the IT infrastructure. Whilst many organisations may have conducted this for the rest of their IT operations, the print environment is typically neglected. IT service providers should work closely with print partners to leverage their expertise in conducting these complex print assessments, emphasising the importance of alliances between manufacturers and IT outsourcing providers.
- **Standardisation is the key to successful long-term MPS.** As most organisations operate with a heterogeneous print environment, the advantage of fully supporting a multivendor environment in the initial stages of an MPS engagement cannot be overstated. However standardised, technology must be flexible and open enough to integrate with new technology as the business requirements and market offerings change.
- **The quality of service level agreements (SLA) will shape successful ongoing MPS engagements.** SLAs are an essential part of any outsourcing project. Whilst IT service providers will have already developed a best practice approach to SLAs through existing outsourcing engagements, emerging printer manufacturer MPS providers will need to ensure that SLAs are flexible, promote risk and reward sharing, and provide benefits for both parties. This is particularly well demonstrated by Fujitsu Siemens Computers' open-book benefit sharing model.
- **Integration with IT management software will enhance the value of MPS**. Today MPS capabilities are limited to proprietary document accounting and reporting tools which give a view solely of the print environment. As other parts of the IT infrastructure are typically managed by standardised systems management tools, tying print management and reporting tools to the IT management tools represents an opportunity for the print environment to be viewed and controlled as part of more holistic IT management
- **Supporting business processes represents real opportunity**. Utilising document workflow solutions, such as document capture and secure printing, as part of an MPS engagement, enables both paper and electronic documents to be more tightly integrated into business processes. This takes MPS to the next level by building on its foundation to manage the print infrastructure to enabling real business value through managing the complete document lifecycle.

An independent study by Quocirca Ltd.

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1 Introduction

Organisations continue to be driven by a combination of controlling cost and improving efficiency and, to achieve these, increasingly turn to outsourcers, as well as approaching IT as a utility. Alongside this is the continued drive for sustainability and the growing awareness of how IT impacts an organisation's carbon footprint. This trend is seeing the emergence of consulting services that help organisations to implement initiatives that make the procurement, operation and disposal of IT assets more environmentally responsible. Such services include data centre and desktop virtualisation, supply chain optimisation and remote working solutions and, increasingly, the optimisation of the printing environment.

Print costs are estimated to account for between 1% and 3% of an organisation's total revenue, yet is an area that has literally been *left to its own devices*. Digital communication has actually led to a rise in printed content, often these days in colour, which has led to escalating print costs for many organisations. Adding to this is the fact that ownership of devices is often fragmented across departments and locations, many of which are from a diverse range of manufacturers, requiring the storage of many incompatible consumables. In addition, whilst facilities management would have been traditionally responsible for the purchasing and management of service contracts for photocopiers and fax machines, the emergence of the networked multifunction device (that acts as a printer, scanner, copier and fax) has led to IT becoming more involved in the purchasing and management of all devices.

In order to gain control of their complex print environments, many organisations are turning to managed print services (MPS). MPS providers may be printer or copier manufacturers, specialist managed print providers, channel partners or IT service providers. An MPS provider assumes responsibility for the management of either part of or the entire print environment and can handle the full gamut of activities including assessment, fleet optimisation, asset management, maintenance, and support and change management.

This report provides an overview of the MPS market landscape, the key suppliers in this space and how their capabilities compare. Quocirca interviewed a range of MPS providers to understand their strategy in delivering managed print services, their approach to delivery and their strategic focus on this area. This is not a definitive list of all suppliers but a sample of the key players.

2 MPS evolution

The MPS market has evolved from the basic services of maintenance, supplies and fleet management to encompass solutions for assessing, optimising and managing an enterprise-wide printing infrastructure. This is where most MPS offerings fit today, although companies such as Xerox Global Services already offer a full range of enterprise document services. Document process outsourcing relates to the on or off-site services which cover the complete document lifecycle, from creation to storage and archival. Business process services enable documents to be effectively integrated into the business workflow, for example by using software to improve the efficiency of both paper and electronic document processes.

MPS providers who are able to also offer these types of enhanced document services will be able to drive further business value by enhancing the fundamental cost savings of optimising the printing infrastructure. However, many organisations still need to take the first step to optimise their print environment, which provides the foundation for creating a wider enterprise document strategy.

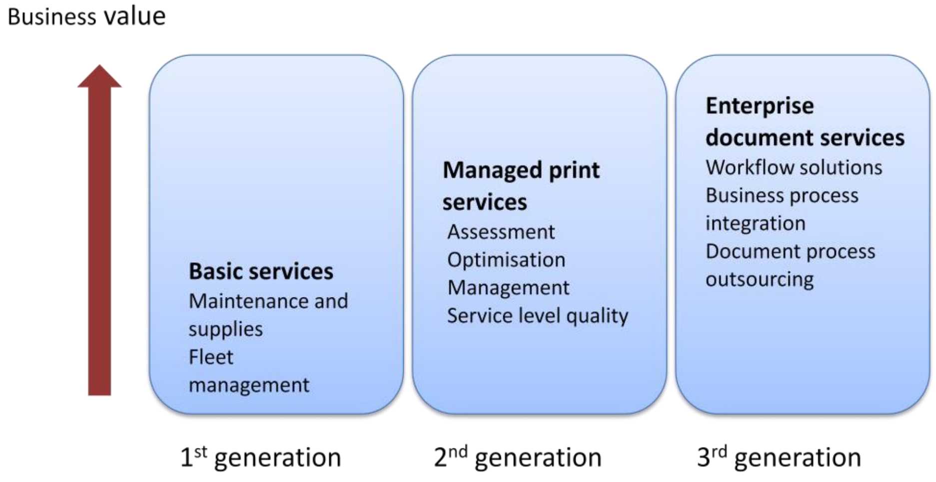

Figure 1. MPS Evolution

3 The phases of MPS engagements

MPS engagements vary in the service capability offered and delivery approach. Whilst some MPS providers, such as Xerox, favour a fully outsourced approach, taking full control of an organisation's output environment, an increasingly popular approach is the modular, or out-tasking approach characterised by companies such as Canon, HP and Fujitsu Siemens Computers. Through this flexible outsourcing model, services can be outsourced as required, enabling the customer to retain control of their technology if needed, and the customer can move to a fully outsourced approach if required.

MPS engagements are typically shaped by the phases of assessment, design, implementation and maintenance. The following service definitions have been used to compare vendor capabilities:

- **Assessment:** through a print audit or assessment, an organisation can gain an understanding of the total cost of ownership (TCO) of the print environment such as initial and ongoing costs including supplies, maintenance and support. Assessments are categorised as follows (based on Infotrends categorisation):
  - Level 1 - conducted internally using either manual or automated tools for measuring output. It is limited in scope and focuses on the total number of devices under consideration in an organisation, the cost of supplies for those devices, together with a speculative estimate of the total monthly volume of pages produced. Level 1 analysis generates a preliminary understanding of the cost per page (CPP) for devices based on specifications and usage.
  - Level 2 - combines basic company data with secondary research to give a view of the "current state" costs. This approach provides a more specific analysis of document output costs and how these compare to similar organisations in terms of operating efficiency.
  - Level 3 - this is the most sophisticated and involves a level of document assessment that can take from a few weeks to three months to conduct. A Level 3 assessment uses both primary and secondary data to give a comprehensive view of an organisation's current costs and provides advice regarding their recommended future state. As a consequence, this type of assessment is also the most expensive and requires a high degree of collaboration between the user organisation and the assessment provider.

  Once an assessment is complete, the recommendations that result provide an implementation policy to ensure long-term cost reductions and a return on investment. At this stage service levels can be set and agreed on.
- **Implementation:** this includes ongoing procurement, fleet optimisation, deployment management and installation (IMAC – installation, move, add, change) and integration. Project management is also an important part of this stage and is necessary to ensure continuous improvement and adherence to service levels.
- **Management:** this includes asset management, third party service management and consumables management.
- **End-user services:** this includes help desk, on-site support and training for both end-users and IT staff.
- **Maintenance and support:** MPS providers may provide this for their own (where relevant) and third party equipment. This also includes proactive supplies management capabilities, which enables ink and toner levels to be monitored and re-ordered automatically, and also preventative maintenance through remote monitoring capabilities.
- **Change management:** this relates to training and communications services which enable a smooth transition to new printing processes and technology as they become available.

Benefits of MPS

Reduced costs

- Transparency through "pay-as-you-go" or "per-page" pricing gives total visibility into document production costs.
- Leasing printing equipment also gives access to latest devices which means money is not tied up in hardware and budgets can be planned in advance.

Simplicity

- A managed print services provider offers a single point of contact and accountability for device management, service and supplies.
- Consolidated, regular billing that includes services and consumables for all managed devices simplifies reconciliation and accounting processes and provides an insight into actual print costs.

Increased employee productivity and satisfaction

- Employees benefit from increased uptime, onsite response to emergency problems and automatic restocking of printer supplies. This leaves staff to focus on core competencies and business priorities.

Enhanced security and compliance

- A managed service provider can identify particular risks and recommend relevant solutions that enhance privacy and provide audit trails to report print usage.

- **Ongoing monitoring:** post implementation monitoring of the print environment ensures that it is right sized and that cost savings are monitored and ongoing. Consumption trends can be checked and savings further optimised. This may take the form of regular review meetings for continuous improvement, SLA measurement and reporting.

4 MPS competitive landscape

The MPS market is characterised by a range of suppliers who offer differing capabilities depending on whether they are manufacturers or IT service providers. Generally, MPS providers can be categorised as:

- Services or consulting practices of printer and copier manufacturers (such as HP, Xerox, Canon, Konica Minolta, Ricoh). These vendors' services practices are typically tightly tied to their product offerings and include assessment, design, implementation and support services. MPS may also be offered by their channel resellers where capabilities exist and are encouraged.
- IT systems integrators/outsourcers (such as Accenture, EDS, Fujitsu Siemens Computers, CSC, Atos Origin). These may partner with one or more printer manufacturers and service engagements may be part of a wider desktop service offering.
- IT mega vendors (IBM) who may approach managed print services as part of a wider green IT service strategy.

Merger and acquisition activity will see organisations change their profile, such as the recent HP/EDS announcement which, from an MPS point of view, moves the newly merged organisation into the mega vendor category.

4.1 Printer/copier manufacturers

The major printer/copier vendors, as would be expected, have developed a robust set of services with most offering support for multivendor environments. As large enterprises are typically the target for MPS, the requirement for global consistency of services that can be delivered locally has become increasingly important. This is best reflected by the global service infrastructure that underpins Xerox Global Services go-to-market approach. HP and Lexmark also focus on a global delivery of services and Canon is actively expanding its global service capabilities.

Amongst these vendors, Xerox Global Services currently has the most established and broad MPS portfolio, delivered through its Office Services (XOS) group, which is one of three service offerings that Xerox leads with in large enterprise engagements. The other two are business process services (BPS) and document outsourcing and communication services (DOCS). By having the capability to leverage the extended benefits of BPS and DOCS, Xerox is positioned as one of the only providers to offer the full range of document lifecycle services. As such it is already successfully engaging in the third generation of managed print services, which encompasses document process outsourcing and workflow solutions.

Xerox has won some significant deals (for example the Department of Work and Pensions in the UK, a £400m, seven-year contract); boosted by its strategic partnership with EDS. Xerox is actively enhancing its global alliance partnerships, with CSC announcing in June 2008 that Xerox is now a global alliance partner, building on their existing relationship, where Xerox provides CSC with document management services.

Meanwhile, HP is aggressively moving up the value chain, always seeking to increase its footprint in the corporate printing market. It has developed a strong set of services and recently added document workflow capabilities to its range of modular services. Its recent acquisition of EDS will add to its potential strength and will help it gain more traction for its managed print services amongst the large enterprises. Lexmark is also an established MPS player, particularly focusing on the productivity, financial and environmental benefits of business process optimisation. Its distributed fleet management service is provided through its global services organisation and is based on its core asset lifecycle infrastructure which enables it to provide global delivery of standardised services, which include multivendor support.

Building on the success of local MPS engagements, Canon has developed a pan-European MPS strategy backed by a cohesive range of services which can also be delivered globally. As Canon's European MPS organisation is still in its infancy, its success in winning new customer engagements relies on the execution of the new teams at both a local and European level. Whilst its direct model is its primary route to market, Canon as yet does not work with any major IT service providers in a similar way to Xerox, HP or Ricoh.

Ricoh is actively enhancing its MPS capabilities and, whilst currently Ricoh's MPS is delivered on a regional basis in Europe, Ricoh has already developed alliances with CSC and Atos Origin, giving it a strong position in IT service engagements where the printing infrastructure is included.

Konica Minolta's iDOC consulting service is comprehensive in its capabilities but is focused primarily on Konica Minolta products, with limited multivendor support. However, for those businesses that already have or are planning to standardise on a Konica Minolta bizhub environment, the iDOC service would make the most of this investment and enable the full benefits of its remote support and maintenance system be realised.

InfoPrint Solutions Company (a joint venture between IBM and Ricoh) currently offers bespoke managed print services based on customer requirements in Europe. However it has recently announced a set of managed print service offerings in the US and this is expected to roll out in Europe during the latter part of 2008.

4.2 IT systems integrators/outsourcing providers

Companies such as EDS have a long established relationship with Xerox, although this will be affected by the recent HP acquisition of the former. The managed print service offerings of these providers are often closely tied to a particular printer manufacturer alliance partner, so the depth of service is related to how broad a portfolio is offered by that manufacturer. IT service providers are increasingly approaching MPS as part of a wider green strategy, which may include data centre consolidation and virtualisation, supply chain optimisation and IT infrastructure management. For instance, Accenture promotes MPS as part of a wider green IT service offering, which is delivered through its partnership with Xerox. MPS often forms part of a portfolio of services, but is generally a small part of the overall services business for these vendors.

Fujitsu Siemens Computers is one of the few IT service providers that work with a number of printer manufacturers. It has built a robust set of print lifecycle services based on its overall managed office services capability, which adopts a flexible out-tasking approach. IT service providers, unlike printer manufacturers, are not driven by page volumes and consumable revenue, and also offer the IT infrastructure management expertise often not available through pure MPS providers.

Pitney Bowes deserves a mention here despite its heritage in mailstream technology and document process outsourcing. It is one of the only vendor-neutral providers of MPS and works with most printer and copier manufacturers. It is actively investing in its PrintWorks print asset management service which has over 100 customers in Europe.

4.3 IT mega vendors

These providers often take a holistic view of IT services, positioning IT as an enabler for sustainable or green business initiatives. Again, MPS may be part of a wider IT service portfolio but is limited to alliance partnerships and is now emerging as a service choice as these vendors promote their services to support a green service strategy. Although IBM has a raft of green IT services that cover data centre optimisation, storage management and infrastructure software, its output management service (OMS) does not feature as part of its overall offerings. Given the impact that inefficient printing can have on an organisation's green credentials, IBM should certainly consider strengthening its MPS offering to enable it to provide a wider and fuller portfolio of green IT services.

Figure 2 shows a sample of MPS providers positioned according to whether they are vendor independent or printer/copier MPS providers, along with an indication of the breadth of the portfolio of MPS services they provide.

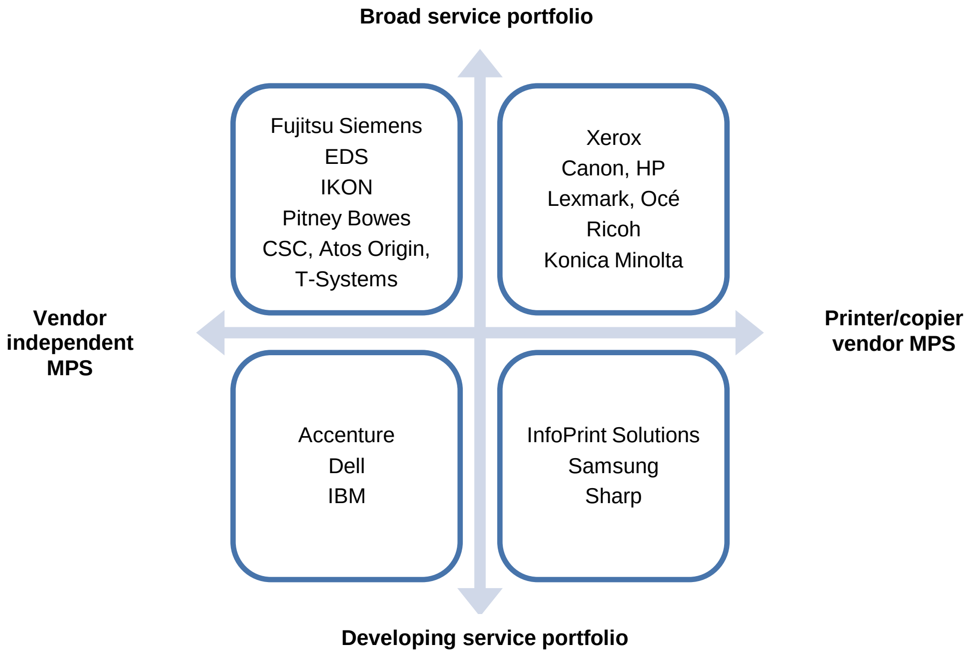

Figure 2. Competitive positioning of MPS players

5 MPS provider capabilities

The following table summarises the MPS approach for the key MPS providers. It is not intended to be an exhaustive list of all MPS providers, but provides a sample of the main players in the European MPS market today.

	Canon	HP	Lexmark	Océ*	Konica Minolta	Ricoh	Xerox	Pitney Bowes	EDS	Fujitsu Siemens	CSC*	Atos Origin
Service approach *(Modular or full outsourced)*	Modular	Modular	Modular	Full	Modular	Modular	Full	Modular /Full	Full	Modular	Modular	Modular /Full
MPS Primary route to market	Direct	Direct	Direct	Direct	Direct	Direct	Direct	Direct & partners	Direct	Direct	Direct	Direct
Geographical delivery	Global	Global	Global	Global	EMEA	EMEA	Global	Global	Global	EMEA	EMEA	Global
No. European customers**	More than 100	More than 1000	N/D	N/D	Approx 600	Less than 50	More than 1000	100-500	N/D	26-50	N/D	Approx 1300
Alliances	Local	HP internal	Dell, IBM, Fujitsu Services, Siemens	N/D	N/A	CSC, IBM, Atos Origin	EDS, IBM, CSC, Deloitte, Capgemini (Global)	Global	Xerox	Ricoh Kyocera Lexmark	Ricoh Xerox	Ricoh Xerox Océ Fujitsu - Siemens
Av. Length of contract	3-5 yrs	3-5 yrs	4 yrs	Up to 5 yrs	2 yrs	30-60 months	3-5 yrs	3-5 yrs	N/D	3-5 yrs	N/D	4 yrs
No. mega deals 2007 (more than $25M)	2	N/D	N/D	N/D	N/D	N/D	10	1	N/D	2	N/D	N/D
MPS Revenue Range	$100m to $500m	N/D	N/D	N/D	Less than $100m	Less than $100m	N/D	$1m to $5m	N/D	Less than $100m	N/D	N/D
Growth on previous year	50%	N/D	N/D	N/D	N/D	N/D	N/D	40%	N/D	N/D	N/D	6%

N/D = not disclosed
* Please note that Océ and CSC were unable to verify details of their MPS offerings.
** Each MPS vendor defines an MPS customer differently and may relate to full or partial responsibility for an organisation's print environment.

Figure 3: Overall MPS provider summary

The following table provides an indication of the breadth of the portfolio of managed print services that they provide.

Key: ● Full capability ○ No capability ◇ Limited capability/offered with partners ⦸ Not known

	Canon	HP	Lexmark	Océ	Konica Minolta	Ricoh	Xerox	Pitney Bowes	EDS	Fujitsu Siemens	CSC	Atos Origin
Assessment												
Level 1 – Basic	●	●	●	●	●	○	●	●	●	●	⦸	◇
Level 2 – Assisted	●	●	●	●	●	●	●	●	●	●	●	●
Level 3 - Consultative	●	●	●	●	●	●	●	●	●	●	●	●
Workflow analysis	●	●	●	●	●	●	●	●	●	●	⦸	◇
Implementation												
Multivendor procurement	◇	●	●	●	○	⦸	●	●	●	●	●	●
Fleet optimisation	●	●	●	●	●	●	●	●	●	●	●	●
Deployment planning	●	●	●	●	●	●	●	●	●	●	●	●
Installation (IMAC) integration	●	●	●	●	●	●	●	●	●	●	●	●
Project management	●	●	●	●	●	●	●	●	●	●	●	●
Management												
Fleet management	●	●	●	●	●	●	●	●	●	●	●	●
Asset management	●	●	●	●	●	●	●	●	●	●	●	●
Multivendor management	●	◇	●	●	◇	●	●	●	●	●	●	●
Consumables management	●	●	●	●	●	●	●	●	●	●	●	●
Billing and accounting	●	●	●	●	●	●	●	●	●	●	●	●
End-user services												
Help desk	●	●	●	●	●	●	●	●	●	●	●	●
On-site support	●	●	●	●	●	●	●	●	●	●	●	●
Training	●	●	●	●	●	●	●	●	●	●	●	●
Maintenance and support												
Multivendor	●	◇	●	●	○	●	●	●	●	●	●	●
Remote monitoring (own equip)	●	●	●	●	●	●	●	●	●	N/A	N/A	N/A
Remote monitoring (third party)	●	○	●	⦸	○	●	●	●	●	●	●	◇
Proactive supplies mgmt	●	●	●	●	●	●	●	●	●	●	⦸	◇
Services portal	○	●	●	⦸	○	○	●	●	●	○	⦸	◇
Change management												
Training and communications	●	●	●	●	●	●	●	●	●	●	●	●
Monitoring												
KPI\SLA Measurement	●	●	●	●	○	●	●	●	●	●	●	●
Reporting	●	●	●	●	●	●	●	●	●	●	●	●
Contract Management	●	●	●	●	●	●	●	●	●	●	●	●
Print room services												
In house/3rd party print-room	●	○	◇	●	◇	●	●	●	●	○	○	◇
Contract/pricing												
Flexible SLA	●	●	●	⦸	●	○	●	●	●	●	⦸	●
Fixed SLA	●	●	●	⦸	●	●	●	●	●	⦸	⦸	◇
Flexible pricing model	●	●	●	⦸	●	●	●	●	●	●	⦸	●

Figure 4: MPS provider capabilities

6 Recommendations

As organisations continue to optimise their IT infrastructure, reduce costs, improve efficiencies and lower the environmental impact of their business, controlling and managing the print environment will become a more vital element for achieving all these aims. Although the MPS market is still evolving, the best positioned MPS providers will be those who offer a broad portfolio of services and can translate the significant cost savings of optimising the printer fleet to further enhance document workflow processes as organisations move into the next phase of their enterprise document strategy.

6.1 Vendor recommendations

Service providers should consider the following developments in the evolution of managed print services:

- **Green IT remains a hot topic.** Green IT has been given significant exposure by IT vendors and service providers, not least in the area of data centre virtualisation. MPS should be positioned to support greener business practices providing tools that not only demonstrate the financial savings but also the environmental benefits of optimising the print environment. MPS providers should look to partner with vendors who can complement their current offerings, either from an IT or print management perspective.
- **Assessments underpin a successful MPS engagement**. Most IT outsourcing engagements begin with an initial assessment of the IT infrastructure. Whilst many organisations may have conducted this for the rest of their IT operations, the print environment is often neglected. IT service providers should work closely with print partners to leverage their expertise in conducting these complex print assessments, emphasising the importance of alliances between manufacturers and IT outsourcing providers.
- **Standardisation is the key to long-term MPS engagement.** Given the fact that most organisations will have sourced their current fleet from multiple vendors, the advantage of supporting a heterogeneous environment in the initial stages of a MPS engagement cannot be overstated. However, maintaining many vendor relationships will prevent organisations benefiting from economies of scale, and can create inefficiencies, as well as higher IT support costs. In the long term, a standardised environment is the most cost effective and efficient to manage. However, standardised technology must be flexible and open enough to integrate with new software and solutions as the business changes.
- **Flexible service level agreements (SLAs) will shape successful ongoing MPS engagements.** SLAs are an essential part of any outsourcing project. Whilst IT service providers will have already developed a best practice approach to SLAs through existing outsourcing engagements, emerging MPS providers will need to ensure that SLAs are flexible, promote risk and reward sharing, and create benefits for both parties. Metrics should not only relate to uptime of devices but also to user productivity. An effective SLA can help to ensure that the MPS provider is helping the customer meet or surpass both business and technology service levels, which in turn leads to increased productivity.
- **Integration with IT management software will enhance the value of MPS engagements**. Today, MPS capabilities are limited to proprietary document accounting and reporting tools which give a view solely of the print environment. As other parts of the IT infrastructure are typically managed by standardised system management tools, tying print management and reporting tools to those used for IT management represents an opportunity for the print environment to be viewed and controlled more holistically. Such tools could include overall carbon measuring and reporting capabilities, and can also be tied into ERP systems for service and procurement.
- **Supporting business processes represents a real opportunity**. Utilising document workflow solutions as part of a MPS engagement enables both paper and electronic documents to be more tightly integrated into business processes. Just a few MPS providers offer this capability at present, but, as more organisations begin rationalising their print environment, business process services will offer them further potential to reduce costs and use the document production environment as an enabler for improved business workflows.
- **Focus on document security through secure printing solutions.** Many print manufacturers already offer a range of secure printing solutions such as authenticated or “follow-me” printing. As security remains high on the IT agenda, MPS providers should encompass such secure printing applications within their MPS portfolio.

6.2 Purchasing recommendations

The most important criteria to consider when choosing a managed print services provider are as follows:

- **How well does the scope of services match your business needs?** Does the MPS provider offer a wide range of services such as asset optimisation, supplies management, help desk support and user training that match your specific requirements?
- **Does the vendor have a proven record of satisfied MPS customers?** How long has the provider been offering managed services? How many devices are currently under management? Can the provider offer customer references?

- **Does the provider offer a detailed assessment of the print environment?** Is an established methodology used? What scalability is offered in terms of depth and cost of assessments? What is the opportunity for ongoing tracking of assets, costs and usage?
- **Are best of breed equipment and solutions supported?** Does the MPS provider support or offer a wide range of monochrome and colour printers, MFPs, or cater for specialised output needs such as high speed colour printing for graphics arts environments? What types of tools are used to monitor and manage the entire output fleet? Does the provider offer solutions for document workflow, secure printing or customisation services for specific business needs?
- **Is a multivendor environment supported?** Does the provider offer support and manage devices from multiple vendors? What strategic relationships does it have? Can your existing equipment, spares and consumables be retained or will new equipment purchases be necessary?
- **How flexible is the MPS agreement?** Can you start with a limited engagement and add services as business requirements evolve? Can new technology be integrated into the service package? How flexible are the provider's billing methods in terms of monthly volumes or cost-per-page?
- **What types of SLAs are available?** Are service levels matched to your needs (hours of service, problem resolution times, end-user productivity)? How does the provider handle service events in a multivendor environment? How is problem resolution handled? Is a pre-emptive service approach used to reduce response times and solve device problems? Is onsite or off-site support available?
- **What are the geographical delivery capabilities?** Does the MPS provider have a global footprint – national and international – that matches your business? What resources are available on a global or local level?
- **What communication approach is taken?** Does the provider conduct regular meetings with you? Does it establish a clear matrix of roles and responsibilities within your organisation and the MPS provider? What change management methodologies and processes are used?
- **Does the provider articulate a green strategy?** What solutions do they offer to help you enhance your environmental credentials such as reducing power usage and paper wastage?

About the sponsors

Canon	Canon Europe is a subsidiary of Canon Inc. of Japan, a world-leading innovator and provider of imaging and information technology solutions for individuals and businesses. The main business focus for Canon Europe is in two clearly defined markets: Business Solutions (developing IT products, solutions and services for the office and professional print environments) and Consumer Imaging (photo, video, Bubble Jet printers, scanners, fax machines and multifunction devices). Canon Europe also provides Industrial Products including broadcast lenses, semiconductor and medical equipment. Canon Europe employs in the region of 11,000 people across 19 countries. Further information about Canon Europe is available at: www.canon-europe.com
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hp®	HP focuses on simplifying technology experiences for all of its customers – from individual consumers to the largest businesses. With a portfolio that spans printing, personal computing, software, services and IT infrastructure, HP is among the world's largest IT companies, with revenue totalling $110.4 billion for the four fiscal quarters ended April 30, 2008. More information about HP (NYSE: HPQ) is available at http://www.hp.com.
KONICA MINOLTA	Konica Minolta Business Solutions Europe GmbH is a leading provider of image information products with subsidiaries and distributors in more than 50 countries in the EMEA region. The company places major emphasis on the document management and solution business in the office and production environment, especially in the field of colour output as well as related supplies. Konica Minolta Business Solutions Europe is a subsidiary of Konica Minolta Business Technologies, Inc., headquartered in Tokyo, Japan. With a total workforce of 21,000 employees worldwide, Konica Minolta Business Technologies gained net sales of over 4.4 billion Euros in fiscal 2006/2007. Building on its strong core of optical technologies developed over many years as a printer and camera manufacturer, Konica Minolta Business Technologies aims to be a corporation offering products and services that are essential to all areas of digital imaging. www.konicaminolta.eu
RICOH	Ricoh designs, develops and manufactures a complete range of print and document management, hardware, software and services which are tailored to meet individual customer needs. Its devices print, copy, scan and fax documents as an integrated part of the IT network and enterprise content management system. Software is used to audit usage, manage document flows, simplify business processes, control print expenditure and secure access. The company takes an innovative approach to research and development, having invented the first digital black & white copier and introducing the colour-capable device. Ricoh UK's environmental credentials are second to none. It operates a zero-waste policy at all of its manufacturing plants and maintains carbon-neutral status at its headquarters in Feltham, Middlesex. It operates a dedicated 'Green Centre', where old machines are re-commissioned and recycled in line with WEEE Directive guidelines, and has been accredited with ISO14001 for environmental management.
xerox	Xerox Corporation (NYSE:XRX) is the world's leading document management technology and services enterprise. A $17 billion company, Xerox provides the document industry's broadest portfolio of offerings. Digital systems include color and black-and-white printing and publishing systems, digital presses and "book factories," multifunction devices, laser and solid ink network printers, copiers and fax machines. Xerox's services expertise is unmatched and includes helping businesses develop online document archives, analyzing how employees can most efficiently share documents and knowledge in the office, operating in-house print shops or mailrooms, and building Web-based processes for personalizing direct mail, invoices, brochures and more. Xerox also offers associated software, support and supplies such as toner, paper and ink.

About Quocirca

Quocirca is a primary research and analysis company specialising in the business impact of information technology and communications (ITC). With worldwide, native language reach, Quocirca provides in-depth insights into the views of buyers and influencers in large, mid-sized and small organisations. Its analyst team is made up of real-world practitioners with first-hand experience of ITC delivery, who continuously research and track the industry in the following key areas:

- Business process evolution and enablement
- Enterprise solutions and integration
- Business intelligence and reporting
- Communications, collaboration and mobility
- Infrastructure and IT systems management
- Systems security and end-point management
- Utility computing and delivery of IT as a service
- IT delivery channels and practices
- IT investment activity, behaviour and planning
- Public sector technology adoption and issues
- Integrated print management

Through researching perceptions, Quocirca uncovers the real hurdles to technology adoption – the personal and political aspects of an organisation's environment and the pressures of the need for demonstrable business value in any implementation. This capability to uncover and report back on the end-user perceptions in the market enables Quocirca to advise on the realities of technology adoption, not the promises.

Quocirca research is always pragmatic, business-orientated and conducted in the context of the bigger picture. ITC has the ability to transform businesses and the processes that drive them, but often fails to do so. Quocirca's mission is to help organisations improve their success rate in process enablement through better levels of understanding and the adoption of the correct technologies at the correct time.

Quocirca has a proactive primary research programme, regularly surveying users, purchasers and resellers of ITC products and services on emerging, evolving and maturing technologies. Over time, Quocirca has built a picture of long-term investment trends, providing invaluable information for the whole of the ITC community.
Quocirca works with global and local providers of ITC products and services to help them deliver on the promise that ITC holds for business. Quocirca's clients include Oracle, Microsoft, IBM, Dell, T-Mobile, Vodafone, EMC, Symantec and Cisco, along with other large and medium-sized vendors, service-providers and more specialist firms.

Sponsorship of specific studies by such organisations allows much of Quocirca's research to be placed into the public domain at no cost. Quocirca's reach is great – through a network of media partners, Quocirca publishes its research to a possible audience measured in the millions.

Quocirca's independent culture and the real-world experience of Quocirca's analysts ensure that our research and analysis is always objective, accurate, actionable and challenging.

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