

Managed Print Services Come of Age

European Vendor Landscape, 2010

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Louella Fernandes
Quocirca Ltd
Tel +44 1753 754838
louella.fernandes@quocirca.com

Clive Longbottom
Quocirca Ltd
Tel +44 1189 483360
clive.longbottom@quocirca.com

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. These include HP, Konica Minolta, Lexmark, Ricoh, Toshiba, Xerox, Equitrac, LRS, SafeCom and NewField IT. We are grateful for their time and insights.

Quocirca has obtained information from multiple sources in putting together this analysis. These sources include, but are not constrained to, the vendors themselves. Although Quocirca has attempted wherever possible to validate the information received from each vendor, Quocirca cannot be held responsible for any errors in information received in this manner.

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EXECUTIVE SUMMARY

In Quocirca's evaluation of major providers of Managed Print Services (MPS) in Europe, Quocirca found that Xerox and HP lead the pack, due to their global scale and broad service capabilities. The analysis also showed that Ricoh and Lexmark have gained considerable ground, demonstrating effective maturity and service delivery excellence. With increased awareness of MPS amongst large enterprises, Quocirca believes that innovation will shape the success of larger MPS engagements, requiring a broader use of document workflow solutions for business process improvement. As the core components of MPS become more commoditised, it will be innovation and service delivery that will differentiate the strongest players in the market.

- **Xerox and HP lead the market, with Ricoh and Lexmark making strong gains**

Xerox and HP continue to dominate the market in terms of overall global scale with strong market presence and complementary service offerings such as business process outsourcing (BPO), IT outsourcing (ITO) and document process outsourcing (DPO). Xerox leads in terms of revenues and managed devices with an estimated 1.5 million devices under contract. Despite their smaller size, Lexmark and Ricoh are making strong progress in the market and Ricoh appears as a leader for the first time in Quocirca's analysis of the market. Lexmark is a solid provider for its targeted vertical industries such as retail and banking, excelling in the delivery of multi-country MPS contracts. Meanwhile, Ricoh has a mature vision for its end-to-end managed document services approach, with the IKON integration having particularly boosted its MPS business in 2010. Konica Minolta also qualified as a strong contender, gaining significantly improved scores for its current offering and strategy.

- **Assessments expand beyond the office environment**

Large enterprises often manage desktop printing, the print room and business-critical output from enterprise applications such as SAP and Oracle in silos, resulting in little or no visibility of enterprise-wide printing costs. Xerox and, more recently, HP are both promoting their enterprise-wide MPS capabilities, with Xerox incorporating external print procurement into the mix. In order to achieve cost savings and business process improvement across these areas, businesses should undertake a comprehensive assessment of their complete existing printer estates. However, for many businesses the focus remains on firstly optimising the office environment. Assessment services vary in scope and depth – from basic services to more in-depth environmental, security and workflow analysis.

- **Leading MPS vendors renew focus on reducing print room inefficiencies**

Many high volume document production processes are rarely integrated across the office and print room environments. This often results in poor print room device utilisation, particularly when jobs that can be produced more cost-effectively in the print room are sent to commercial printers, or, equally, office devices are overburdened with high volume prints. Yet, few enterprises use a single provider for both environments, largely due to the fragmented stakeholder involvement between IT and procurement. If this can be overcome it will be an opportunity for vendors like Xerox and Ricoh who already are well established in the print room. The use of integrated workflow tools can enable complex print jobs to be re-routed from office printers to the print room, ensuring optimal device utilisation and minimal business disruption.

- **MPS can create innovation through business process improvement**

Although the value propositions of cost reduction and access to external skills will always be compelling drivers for MPS, larger enterprises are increasingly looking for innovation within their contracts. Consequently, the use of document workflow solutions is becoming a more common feature of larger MPS deals. Solutions that minimise security risks through authenticated printing, or document accounting tools for audit trails or integration with enterprise content management platforms, can further reduce paper wastage, improve user productivity and improve business process workflow.

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1 Introduction

No longer languishing on the side-lines, managed print services (MPS) is now fundamental to the service fortunes of the major printer and copier vendors. In a mature and relatively flat hardware market, MPS is key to vendors capturing incremental revenue opportunities and building longer-term customer relationships. Printing continues to be an integral part of an IT infrastructure, but it's often fragmented ownership and management creates escalating costs – both financial and environmental. Left unmanaged, businesses are challenged in bringing order to chaos characterised by a diverse mix of devices from different manufacturers, requiring different supplies, service contracts and software. Without centralised management, this not only creates an IT and administrative headache, but also raises potential security risks due to lack of controls and audits on printed documents.

Quocirca estimates that around 20% of large enterprises have adopted some form of MPS, with this growth expected to continue as vendors continue to expand and refine their marketing efforts and build their value propositions around the cost saving and productivity benefits of MPS. The gamut of MPS providers has remained largely stable through the past few years, although industry consolidation has reshaped the competitive landscape due to HP's acquisition of EDS in 2008 and Xerox's acquisition of ACS in 2009. These vendors, in particular, are placing greater emphasis on complementary capabilities such as print room and production services, customer communications management (CCM), business process outsourcing (BPO) and IT outsourcing (ITO). The use of a single provider to manage such requirements will often appeal to the largest and most diverse of enterprises, so today the majority of MPS engagements focus on the core offerings of the assessment, optimisation and continuous management of the office print infrastructure.

The MPS market is becoming increasingly competitive, with more vendors developing MPS portfolios that are globally consistent and are investing in the necessary resources and infrastructure to deliver 24/7 available services. Quocirca expects that, as the core MPS offerings become more commoditised, the major providers will need to differentiate their offerings around innovative solutions that deliver business transformation. This report examines the competitive landscape for MPS amongst large enterprises, looking at the main vendor offerings and the third party solutions available to maximise the value of an MPS engagement.

2 Definitions

Quocirca defines a “managed print service” as the use of an external provider to assess, optimise and manage an organisation's document output environment in order to lower costs and improve productivity and efficiency while reducing risk. MPS allows organisations to reduce costs and improve efficiencies by rationalising the print environment. It also leverages existing investments in multifunction peripherals (MFPs) while continually monitoring usage so that the optimised infrastructure continues to meet business needs.

MPS covers a number of service areas across three broad categories:

- **Assessment** – a review of the current print environment to provide recommendations for a rationalised print environment and estimated potential future savings. Assessments range from basic on-line assessments to full workflow assessments. Environmental impact analysis and document security assessments may also be included.
- **Optimisation** – device rationalisation and consolidation to reduce user-to-device ratios, development of print policies to develop a governance framework for a full enterprise MPS, including change management and deployment and transition.
- **Management** – continuous process improvement, business reviews, SLA monitoring, remote management and improving workflow.

These services fall under Quocirca's definition of MPS when the vendor takes over responsibility for delivery under a contract of three years or more in length. Such activities may also involve the transfer of people or assets to the vendor or provider.

3 Methodology

Quocirca has included the following MPS providers in this study: Canon, HP, Océ, Konica Minolta, Lexmark, Ricoh, Toshiba and Xerox. Vendor selection was according to:

- **Experience and skills in providing MPS services.** All providers had to demonstrate a strong record of delivering MPS.
- **Geographical delivery capability.** Each participating provider required the capability to deliver services across multiple geographies in Europe.

Each MPS vendor was requested to complete a written submission detailing its strategy, capabilities and customer references to ensure key facts and figures were captured. These submissions were followed up with vendor interviews. The quantitative and qualitative inputs from the vendor research was analysed by Quocirca in order to determine each vendor's score against a list of criteria for market presence and completeness of offering.

4 The MPS ecosystem

The overall MPS landscape is characterised by printer/copier manufacturers, systems integrators, software infrastructure vendors and consulting/audit firms.

- **Printer/copier manufacturers:** These programmes are tied to vendor product offerings and include assessment, design, implementation and support services. Vendors may also offer channel MPS programmes through reseller partners where capabilities exist. Vendors in this category include Canon, HP, Konica Minolta, Lexmark, Ricoh, Toshiba and Xerox.
- **Systems integrators/resellers:** These are often a channel to market for printer and copier vendors, and may offer MPS as part of a wider desktop service offering. Vendors in this category include Atos Origin, Cap Gemini, CSC and IBM.
- **Software infrastructure vendors:** These provide software tools for assessment and optimisation of the print environment. Examples include NewField IT's Asset DB; Levi, Ray and Shoup's (LRS) enterprise output management toolset; Equitrac; Print Audit; FM Audit, PrintFleet and SafeCom. MPS providers often use such third party products to add value to a particular element of their MPS portfolio – such as assessment tools, print management or secure printing.
- **Consultants:** These independent firms offer a vendor-neutral approach and may also focus on a specific geography, technology or market niche. As independent consultants do not sell hardware, their assessment and design services provide recommendations that are not tied to a particular manufacturer. NewField IT, Perform IT and more recently LRS, offer such independent assessment services.

5 Assessments – the critical foundation of an MPS engagement

For any MPS engagement to be successful in delivering cost savings and productivity improvements, it is vital to perform an assessment of the current print environment. 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 on-going costs including supplies, maintenance and support.

Commonly analysed metrics include the actual number of devices, the number of users per device, the number of pages produced, device utilisation, device age and the total cost of the entire document output infrastructure. Additional components to assessments, which are becoming increasingly popular, include measurement of environmental impact, document security risk assessment and also server costs (ref: NewField IT). Ultimately, the more comprehensive the assessment, the greater the opportunity for cost reduction and efficiency improvements.

5.1 Assessment types

Assessments come in all shapes and sizes, levels of detail and thoroughness. Many vendors offer varying levels of assessments designed to meet a range of customer requirements. Assessments can be broadly categorised as:

- **Level 1** - conducted internally using either manual or automated tools for measuring output. Level 1 assessments can be either self-guided, web-based, or basic on-site data collection. Such assessments are limited in scope and focus on the total number of devices under consideration in an organisation and 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. Typically there is no software to load and no on-going data collection off the network. This snapshot assessment is ideal for companies who want to have actual data about their output environment for the first time.
- **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. In this more thorough assessment, devices are mapped for each floor/building, end users are surveyed, and scenarios are built showing how different device deployments will impact overall TCO and ROI. The final output of this assessment is a business case with baseline metrics and desired state benchmarks. User-level tracking may also be included to discover device usage at an application level – what is being printed, on what type of media and by whom. Tools from both SafeCom and Equitrac for instance, offer this capability. Devices can then be configured to match user requirements and also enable the implementation of colour quotas and rules based printing.
- **Level 3** - this is the most sophisticated level and involves a method 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. This type of assessment may also include document workflow analysis, environmental impact assessment and document security risk assessments.

5.2 Is there such thing as a vendor neutral assessment?

Although manufacturers will have a vested interest into encouraging a business to standardise as much as possible with their own equipment, in many cases competitive devices must be supported to suit business requirements and where a manufacturer may not have the full product range to replace existing devices. Ultimately, for the hardware manufacturer, an MPS contract is about contracted page volumes, be these through their own devices or third party devices.

Therefore, as few organisations operate a homogenous device fleet, all MPS providers must provide a vendor-neutral assessment of the printer and copier fleet. The range and scope of services varies for each

manufacturer, and, in many cases, hardware manufacturers may enhance their assessment capabilities using third party assessment tools from companies such as PrintAudit, Equitrac, NewField IT and LRS. LRS' assessment offering provides a holistic evaluation of an enterprise's full output environment while Equitrac is often used for analysing each user's document production activity, enabling policy enforcement and better utilisation of devices.

According to Quocirca research conducted in 2009, half of European and US enterprises surveyed used a single printer manufacturer to conduct an audit compared to 20% who used a third party consultant. Although assessment services from independent consultants such as NewField IT are not tied to a particular vendor, Quocirca expects that more enterprises will continue to use a vendor's own assessment services as these are promoted more widely, are perceived as being more convenient for an organisation and the cost is often absorbed into the final contract. Most vendors are investing in expanding and enhancing these services through the use of third party solutions – such as those from Equitrac and LRS.

5.3 Assessments beyond office printing

For larger, more complex and diverse organisations, the scope of the assessment should extend beyond the realms of the office print environment:

- **The print room**

HP, Ricoh and Xerox are all pushing their enterprise-wide MPS strategies, which also encompass the print room. In a Quocirca 2009 study of MPS usage amongst large enterprises, only 23% were using a single provider to manage both their office print environment and the print room. This is most often because of the different stakeholders involved in these areas – IT is more commonly involved in office printing, whereas it is generally procurement that is involved in the print room. Nevertheless, Quocirca expects the print room to become a more strategic area of focus as MPS contracts are renewed and as MPS vendors look for additional service revenues on existing contracts.

- **Application and data printing**

The production of documents such as insurance policies, statements, invoices, shipping manifests or barcode labels can account for a significant proportion of costs for large and complex organisations that rely on such business-critical output. Although many standard MPS assessment services may analyse device usage across enterprise applications (such as ERP and CRM), this is often performed at a device, not user, level. Therefore office MPS assessments may not fully analyse output generated from legacy and enterprise applications unless used in conjunction with a print management application such as Equitrac or LRS. LRS' vendor-agnostic output management assessment service addresses this need by not only analysing page volumes from each device, but also metrics such as the job owner, originating application, target destination, page count, colour characteristics, and more. This data enables LRS to provide an organisation with an accurate picture of what it is printing and the costs involved, as well as recommending options to reduce those costs through better device utilisation, alternative delivery channels, eliminating unnecessary printed documents and enhancing document workflow across the enterprise.

5.4 Assessment partner spotlight – LRS

LRS has a long established heritage in providing output management solutions to large enterprises that are reliant on business critical output from legacy and enterprise applications (such as ERP and CRM). Its move into assessment services is built on a robust toolset already proven through its large enterprise engagements. Due to the depth of its capabilities in optimising and managing high volume mission critical output, LRS offers a valuable enhancement to the service portfolio of any MPS vendor looking to extend its services beyond the office environment. For large organisations operating a complex and diverse output environment, enterprise output can represent a significant proportion of overall print costs. Utilising LRS solutions can therefore reduce costs as well as drive efficiency and productivity improvements across an organisation.

6 Document security

6.1 Secure printing and cost recovery

With hard disks, memory and embedded software, networked printers and MFPs are no longer dumb peripherals. Yet few organisations pay the same strategic attention to securing their print environment as they do other elements of their IT infrastructure. Despite the move to electronic communication, paper documents are still critical to many core business processes and represent a major security risk. Once a document is converted from electronic to paper form it is almost impossible to track, and often these documents contain sensitive customer or business information. Few businesses are aware of the threats of operating an unsecured print environment. One way of mitigating document risks, and also reducing costs, is through the implementation of secure printing solutions. When used as part of an MPS engagement, the opportunity to reduce waste, lower carbon footprint and better track print usage is significant. This section highlights the benefits of such solutions and some of the products available.

6.2 No more “print and sprint”

Running to the printer after sending a document is not practical or reliable. Making sure that documents don't get lost on the network or left at a device can be achieved by implementing secure printing solutions. In addition to some built-in security features available with MFP devices, there are also a range of solutions from vendors such as Equitrac, Ringdale and SafeCom that provide more enhanced features such as cost recovery, auditing and reporting – which are particularly important to meet today's compliance requirements.

These solutions enable users to authenticate on a printer or MFP with PIN codes, proximity or smart cards. Secure print solutions can restrict access and usage by enforcing restrictions on colour or types of documents. Convenient printing is achieved through a “pull printing” approach, meaning users can release jobs at any printer at any location. Cost recovery is also made possible as secure print solutions can monitor usage on a user, cost centre and printer basis.

Secure print solutions are typically based on three components: the client, the server and the ID-reader hardware that supports a range of recognition techniques sent to the server for authentication. All document attributes such as file, paper size, media type, colour, duplexing and recipient are captured by the secure print server for analysis. Some solutions, such as SafeCom and Equitrac, also enable the control of copying and scanning. Although such solutions are primarily focused on the Windows environment, documents from UNIX, Linux, mainframe and other platforms can also be secured if used in conjunction with, for example, the LRS Output Server. Products that include this support are Equitrac and Ringdale, while SafeCom also offers tracking of non-Windows generated print jobs.

6.3 Secure printing benefits

- **Document security and confidentiality:** Outputting jobs only when users authenticate themselves means private or sensitive documents are prevented from remaining unattended or unclaimed.
- **Cost allocation and recovery:** Audit trails can record patterns of usage as well as misuse or waste, meaning that documents can be accurately charged to specific department or cost-centre codes. For instance, user-level tracking enabled a large US-based bank to discover that nearly 40% of printing by employees was for personal use. By using Equitrac to deliver monthly reports on print usage and costs to each employee, the bank was able to reduce its printing costs by more than \$2 million over 18 months.
- **Reduced wastage:** Printing costs and wastage are reduced by printing only what is needed and enforcing printing restrictions to conserve consumable and paper usage. Rules-based control can be implemented to automatically delete, hold or re-route print jobs to the most efficient printers – such as using cheaper black and white printers for high volume text-based reports.
- **Print server reduction:** Pending print jobs can be stored locally on a user's computer until he or she authenticates to retrieve the document. Removing the requirement for the large number of print servers that enterprises sometimes operate reduces printer data traffic. For businesses with remote offices and limited bandwidth, this can significantly reduce the number of print servers. SafeCom estimates that one customer saved €200,000 by implementing its Smart Printing solution and reducing the number of print servers from 45 to 4.

6.4 Enhancing an MPS contract with secure print solutions

When considering security as part of an MPS engagement, businesses should consider what level of security is required. This includes ensuring that documents be released only by authenticated users and involves supporting enterprise mobility where workers can print at any location (be it regional branches or different country locations), enabling job accounting, cost recovery or a need to reduce print wastage.

Unsurprisingly, the use of a third party solution requires a level of investment – such as licensing, software support and authentication hardware. Consequently, many manufacturers offer a basic level of PIN-based security through embedded technology at the hardware level – Xerox is one example that offers this on its MFP devices. However, for those businesses who want to retain a mixed fleet of devices or require more sophisticated accounting and reporting, the use of a third party product will ensure that there is a standardised solution for all devices. Most MPS providers therefore offer third party solutions – some of which are highlighted in the rest of this section.

6.5 Security software partner spotlight – SafeCom

SafeCom is a European-based company with a particular vertical market focus on the financial services, manufacturing, public sector and education verticals. Although it has a broad base of hardware partner alliances, HP is one of its strongest partnerships, accounting for most of SafeCom's customer base. SafeCom is actively working on expanding its customer base through hardware vendors and partners across the major European countries. The majority of its installed base is represented by mid-market or enterprise customers, with the UK accounting for the highest proportion of its customers.

The SafeCom Smart Printing solution includes central administration, document accounting, access control and policy enforcement. The SafeCom system can be enhanced with add-on functionality to build customer specific and scalable solutions. A single server solution is available for small and mid-sized companies operating from one location, while its enterprise server solution is designed for larger enterprises supporting from 200 connected printers. In particular, its capabilities for optimised resource usage make it ideal for virtualised environments. SafeCom products include SafeCom Print Tracker, which provides centralised control of users and devices as well as optimisation of printing through print policy management; SafeCom Go, a vendor specific solution, which provides access control and document accounting; a SafeCom controller, which integrates with any networked printer or MFP. SafeCom offers global support for its products.

The modularity and scalability of SafeCom's solution, along with its flexible licensing structure, makes it appropriate for businesses of all sizes. Therefore Quocirca believes that SafeCom is well positioned to address an untapped opportunity amongst mid-market customers for a simple and low-cost secure print solution.

6.6 Security software partner spotlight – Equitrac

Equitrac has established a leading presence in cost recovery and print management markets, particularly in the financial services, public sector and UK legal markets. In Europe, it claims an impressive customer base of over 5,000 customers with a global revenue increase of 6% over the previous year. Its strategy is now to grow its penetration within the MPS market by educating hardware partners as to how Equitrac can enhance its existing MPS portfolio. The Equitrac product can be used at various stages of an MPS engagement. At the assessment level it provides user level reporting of print activity; at the optimisation phase its policy enforcement features can be used to control print usage; and at the management phase its reporting capabilities can be used to drive service level agreement (SLA) quality by analysing key metrics and helping to ensure that cost savings reductions continue to be met.

Equitrac has partnered with several hardware vendors including Ricoh, Xerox, Océ, Sharp, Konica Minolta, HP and Canon to develop embedded Equitrac solutions for these manufacturers' products. Quocirca believes that Equitrac offers a robust and scalable product portfolio that offers a strong feature set and sophisticated reporting. Its global support and market presence sets it apart from other smaller players in the market, making it more attractive to multi-country MPS engagements. Equitrac's challenge will be to develop a licensing model that leverages the scalability of its product while fitting within a typical service-based MPS engagement so that its technology can be added more seamlessly to vendor MPS contracts.

7. Quocirca's MPS vendor assessment

Quocirca has created a vendor scorecard for each MPS provider based on a range of criteria that determines an overall score for market presence and completeness of offering. A full report including vendor scorecards and profiles, along with positioning and a competitive graphic representation are available for purchase from Quocirca.

Market presence criteria

- **Enterprise customers:** The strength of the vendor's European enterprise customer base
- **Strategy:** How comprehensive is the vendor's MPS strategy, the quality of its overall strategic value proposition and its vision on market evolution.
- **Maturity of offerings:** How long has the vendor been active in the market and how developed are its offerings?
- **Geographic reach:** A vendor's geographic delivery capabilities either directly or through partners or channels.
- **Overall financial strength:** A vendor's overall financial position and assessment of the scope for future investment in its MPS offering.
- **MPS revenue and growth:** European MPS revenue and growth over the past year.
- **Market credibility:** The effectiveness of vendor initiatives to promote its brand, increase awareness of its service offering and influence market development. Also includes the clarity and differentiation and internal/external consistency of the vendor's market messages.
- **Alliances and partnerships:** The strength of the vendor's partner and alliance network.
- **Investment and dedicated resources:** The vendor's investment in its MPS portfolio, resources and its innovation that will add improvements in approach, process or service offering.

Completeness of offering

- **Modularity of services:** The flexibility and scalability of the service portfolio to provide a customised service offering.
- **Breadth and depth of service offering:** The range of services available including complementary services such as business process outsourcing (BPO), IT Outsourcing (ITO) and document process outsourcing (DPO).
- **Help desk capabilities:** Centralised help desk capabilities and integration, remote diagnostics and support.
- **CRD/Print room support:** Print room/mail room services and integrated tools such as variable data printing and workflow solutions.
- **Multivendor support and maintenance:** The vendor's ability to support third party products.
- **Mobile printing support:** Capabilities to support mobile workers, either through mobile device printing or pull printing/authenticated secure printing.
- **Document workflow integration:** Integration with third party solutions.

The following categories are used to reflect a vendor's position:

- **Market Leaders:** Vendors that lead the market in both strategic vision and depth of service offering. Leaders have made significant investments in their service portfolio and infrastructure and are supported by strong delivery capabilities.
- **Strong performers:** Vendors that have established and proven offerings supported by demonstrable customer success.
- **Contenders:** Vendors that have service offerings which are currently being aligned on a global or European basis. Challengers are typically investing in resources, infrastructure and partnerships to expand market coverage.
- **Emerging:** Vendors that are in the process of developing pan-European MPS offerings or offer MPS on a regional basis.

7.1 Market leaders: Xerox, HP, Ricoh

Market leaders in the European MPS market possess diverse strengths and wide global presence. Xerox and HP lead the pack due to their global scale, organisational breadth and depth of capability. However Lexmark and Ricoh are snapping at their heels, having both made significant progress in the market in 2010.

Xerox's mature service portfolio helps reinforce its market lead

Recasting itself as a global business process and document management services company since the acquisition of ACS closed in February 2010, Xerox is serious about growing its \$3.5 billion services business. Indeed, the acquisition has signalled a new era for Xerox, catalysing significant investment in the Xerox brand through its global "Ready for Real Business" campaign, which highlights its credentials in business process outsourcing (BPO) and managed print services (MPS). Thanks to the acquisition, Xerox's services revenue climbed to 50% of its total sales in 2010, from 23% in 2009.

Xerox has maintained its leading position in Quocirca's analysis of European MPS market due to its strong market presence, particularly in the UK and France, and mature service portfolio which has been continually developed for the past decade. It currently manages over 1.5 million devices globally; making it the strongest player in the market in terms of customer base and MPS revenue. Its Enterprise Print Services (EPS) offering encompasses all elements of enterprise print – the office, mobile printing and the print room. Certainly, with office printing often accounting for just 40% of overall print related costs, large enterprises stand to generate significant cost savings and productivity improvements by optimising print beyond the desktop to encompass print room services. Xerox now counts Procter and Gamble and Ingersoll Rand amongst its global EPS customers. Whilst Xerox's EPS offering is ideal for large enterprises, its mid-market offerings, under the banner of Xerox Print Services, are also gaining traction in the European market.

The acquisition of ACS also provides an additional route to market for Xerox with EPS being a logical extension to the ACS IT outsourcing (ITO) portfolio. This presents an opportunity for Xerox to penetrate ACS accounts with its EPS offering, and Quocirca expects the results of this to happen in Europe during 2011 as sales integration efforts continue. According to Xerox, such cross-selling initiatives are taking place in more than one hundred accounts globally, which has so far led to more than 30 joint signings and has generated a \$3.5 billion pipeline. ACS' contract with Atos Origin for BPO services in Europe is a promising start to building its visibility as a credible player in this market.

Xerox's 100% renewal rate for its large enterprise MPS clients since 2001 is testament to its strong performance in the MPS market. Quocirca believes that Xerox will extend its market leadership in 2011 as it deepens its footprint in large enterprise accounts by linking Xerox and ACS joint offerings. However, ITO, BPO and MPS have different executive sponsors and different timescales, and synergies will not always be easy to exploit. The breadth and depth of Xerox's services may appear complex and confusing so it should ensure that its service portfolio is carefully positioned to appeal to different buyer segments.

HP's enterprise MPS platform and global scale promises to deepen its enterprise MPS penetration

HP's continued dominance in the printer hardware market, along with its wide product portfolio now enhanced by its strategic alliance with Canon, has contributed to HP's strong performance in the MPS market. HP's MPS business continues to outpace its printer hardware/consumables only business; the latter is expected to grow at 3 to 4% in 2011, compared to double digit growth rates for its MPS business. It currently manages 490,000 devices on a global basis.

HP's MPS reach is wide – it now has approximately 2,700 customers worldwide across 170 countries. In Europe, HP's direct MPS sales force targets 1,800 enterprise accounts, of which it estimates that 80% are multi-country businesses. Its European MPS business has been boosted by MPS contract signings with new customers including Bosch Italy, Nestle Purina, Turismo de Portugal and Deutsche Post DHL. Global wins include Barclays Wealth, ISS, Standard Life and Alcatel Lucent.

HP's competitive position in the MPS market has undoubtedly been enhanced by the acquisition and integration of EDS (now HP Enterprise Services). A growing proportion of HP MPS deals are led by HP Enterprise Services account managers who have a valuable depth of engagement with key HP customers. HP's

Printing Payback Guarantee programme, launched in 2009, helped HP raise awareness of the cost savings it could deliver through MPS. Although take-up of the program has been muted, likely due to the extra consultancy time (and therefore upfront cost) required as part of this service, it has boosted customers' confidence in the potential savings that HP can generate for its MPS customers.

HP's service portfolio is particularly enhanced by innovations in its MPS portfolio. HP Web Jetadmin (WJA) is the leading tool for device administration, monitoring and reporting (HP and non-HP devices) and, together with its HP Universal Print Driver (UPD), reduces administrative overhead and increases end user productivity. Investments in HP's MPS Smart Decision Suite platform also provides advantages, including more streamlined delivery of services and more accessible information and analytics on usage.

HP's IT and network management expertise continues to position it well to deliver combined IT outsourcing and managed print services and leverages its extensive channel network to deliver services and solutions for the SMB market. At the high end, Quocirca expects HP to capitalise on its Canon relationship to expand its footprint in print room management, enabling it to better compete with companies such as Xerox and Ricoh. In April 2010, HP expanded its MPS portfolio to incorporate Enterprise Production Print Solutions, a suite of options that provides capabilities across on-line, print-on-demand, onsite copy/print mailroom services and data centre print outsourcing. The latter is available through HP's Enterprise Services Document Processing Services, which specialises in digitising, archiving and retrieving documents. Additional leverage of its Exstream solutions enables HP to deliver unique customer communications management capabilities.

Ultimately, HP's broad solution portfolio, its global scale and technology investments should enable it to deepen its MPS penetration in both the enterprise and midmarket.

Ricoh's MDS customer growth boosted by IKON integration

Ricoh has made significant strides in developing its Managed Document Services (MDS) positioning during 2010. Ricoh is positioning its MDS portfolio "beyond MPS" to manage all elements of the document lifecycle, underpinned by continuous innovation and improvement. Ricoh now operates a global MDS competence centre – a common business unit across the US, EMEA, APAC and Japan. Ricoh continues to build its European market presence, although its strongest markets are the French and German regions. Although it does not have the enterprise customer base of its key competitors, it has secured a number of global wins and renewals in 2010. To date, it has 342 large enterprise MPS customers across Europe, with MPS accounting for approximately 5% of Ricoh's total business. Ricoh is looking to double this percentage in the next two years, and is targeting growth of over 140% in its MPS business alone.

Ricoh Global Services is the core of its MPS delivery across multiple countries. This will position Ricoh to compete more effectively with other established global MPS providers in the future such as Xerox, while also offering multi-national organisations the true benefits of a global MPS engagement. Ricoh has a number of global customers who have taken advantage of these capabilities, demonstrating an ability to effectively address multiple country requirements. Ricoh has made a number of significant investments to support its MPS initiatives. Most notable is its alliance with IBM to integrate support for Ricoh MFPs with IBM Tivoli systems management products, providing the capability for IT managers to manage Ricoh devices along with other IT equipment (such as PCs, servers, networks) through one management console. It is also building out and expanding its global IT services business, which is already well established in Japan. Ricoh therefore has the credentials to expand its existing capabilities in Europe, which Quocirca expects to see more of in 2011.

Although Ricoh offers multivendor support capabilities, Ricoh's broad product range also offers a standardised product range from the office to the print room and enables customers to benefit from the simplified management associated with a single vendor environment. Quocirca believes that 2011 will be a critical year for Ricoh in the MPS market. The scope of its service portfolio is broad enough to compete with companies such as Xerox, and if Ricoh can further promote and deliver on its global services capabilities it stands to gain significant market share in the coming year.

7.2 Strong performers: Lexmark, Canon

Lexmark's strong capabilities to serve multi-country customers drives MPS business

Lexmark could be described as the dark horse of the MPS industry. By its own admission, it does not invest in huge marketing campaigns or advertising to promote its MPS capabilities, but rather focuses its investment on R&D, MPS systems, channel investments and its sales and operations resources, which are aligned by industry. However, it is a credible player in the market, having offered MPS for almost 12 years through its services organisation, Lexmark Global Services (LGS). Its MPS revenues rose by almost 80% in 2009 and, according to Lexmark, it is on track to repeat this strong performance in 2010. The growth of its MPS business has boosted Lexmark's market share in the workgroup laser segment. Third quarter, 2010, Printing Solutions and Services Division (PSSD) revenue was \$731 million, up 12 % against the previous year.

The biggest share of Lexmark's business is made up of large international blue-chip companies like BASF and Coca-Cola. In the past twelve months, Lexmark has won major new business with eighteen Global 500 customers, having successfully competed against major MPS providers. Lexmark's wins in 2010 include very large accounts such as US regional bank BB&T, engine manufacturer Cummins and white goods manufacturer Whirlpool. In May 2010, Lexmark landed a five-year, \$127 million contract to manage office printers for the Social Security Administration in the US. Its strength lies in its ability to deliver consistently against multi-country MPS engagements, illustrated by such wins in Europe as BASF (50+ countries worldwide), Cummins (40+ countries), top 2 Global European based bank (29 countries), top 5 Eurozone bank (42 countries), Global 500 Manufacturer (worldwide), Kingfisher (International) and Vattenfall (International).

In May 2010, it acquired ECM vendor Perceptive Software in a bid to boost its document management services and enhance its portfolio of document workflow industry-specific solutions. Quocirca believes the acquisition will help Lexmark advance its capabilities for business process optimisation within MPS engagements, and consequently will help further strengthen its MPS business.

Although Lexmark will face increased competition from the larger players in this market, it has a number of capabilities in its favour. By virtue of its relatively small size, as well as owning its technology from the product engine to software and solutions, Lexmark is able to respond quickly to customer requirements – such as customising solutions. This flexibility can set it apart from the larger providers who may not be so agile, particularly from a customisation perspective. According to Lexmark, it's the largest MPS customers that require such customisation. Despite its lower profile in the market, Lexmark has already built its reputation as a credible supplier of multi-country MPS engagements. Lexmark's long foundation in MPS and the dramatic growth of its MPS business is testament to this and, consequently, Quocirca views Lexmark as a strong, if quiet, player in this market.

Canon expands European MPS customer base in 2010

Canon is now a serious contender in the European managed print services market as it embraces a service-led approach for driving sales growth targets for its office imaging devices. Its acquisition of Océ in March 2010 will undoubtedly deepen Canon's penetration in the MPS market. Océ will be able to extend its offering to existing MPS customers with a wider product and service portfolio from Canon. By leveraging the synergies of both companies' solutions for production printing, Canon will also be able to extend its reach into the management of both on-site and off-site print environments.

Canon established a pan-European strategy for MPS in 2008, building on its success in delivering MPS contracts in a number of European countries. Through its newly defined MPS organisation, Canon has developed a customer engagement and operations team that is focused on business development and on-going client services. This, combined with Canon's well-established direct service organisation and service partners that are required to perform to stringent SLAs, demonstrates Canon's ability to ensure successful service-based implementations.

Canon's European MPS business has grown significantly in the past year. The total value of contracts signed in 2009 rose by over 50% to €200m signed in 2010. Canon currently has an overall MPS customer base of over 400 customers, with enterprises accounting for 45% of the total. Although its direct model is its primary route to market, Canon will also need to build its alliance partner network to deliver MPS through the channel to

broaden the accessibility of its services. Although some Canon sales organisations have teamed up with local IT service providers and system integrators, Canon should potentially consider partnering with a strategic IT service provider to offer managed print services as part of wider IT infrastructure optimisation projects. The recent launch in Europe of Canon Consultancy Services, in partnership with Accenture, is still at the embryonic stage and currently does not specifically focus on MPS, but rather on wider opportunities in what it refers to as an emerging enterprise information and media management market. Canon certainly has the credentials to be a credible player in the market and will need to build awareness of its service capabilities to increase its profile in the market.

7.3 Contenders: Konica Minolta, Océ

Konica Minolta expands its global MPS capabilities

Konica Minolta has been considered a niche player for some time in the MPS market, due to its more regional approach, low profile in the European market and focus purely on Konica Minolta devices. However, MPS is now central to its overall global company strategy, and its Optimized Print Services (OPS) programme, launched in 2009, now has all the elements required in a robust MPS portfolio. Currently, MPS represents about 5% of Konica Minolta's total business in Europe, which it expects to increase to 15% over the next two years. Globally, it hopes that its services business will create \$300 million of revenue in FY12.

Konica Minolta has already established itself as a credible MPS provider in the UK, Germany, Central Eastern Europe, and the Nordic region and now has around 600 MPS customers in Europe. To boost its position and profile in the MPS market, Konica Minolta has spent the past year developing its global OPS branding and is making significant investments in resources to support pan-European engagements. It has now implemented a centralised infrastructure for fleet monitoring, process automation, and contract management and is developing both a regional and a global OPS customer web portal. In addition to its own remote management software, CS Remote Care (CSRC), Konica Minolta uses PrintFleet technology, developed by PrintFleet Inc, as a core component of its global OPS offering, enabling it to offer full service and support for third party products.

All Konica Minolta direct sales companies in Europe now lead with a consultancy-based approach, augmented with experienced MPS consultants and project managers. In addition to its global partnership with PrintFleet, Konica Minolta also has a global relationship with Nuance for document workflow and Perform IT for document assessment services. Quocirca expects Konica Minolta to build out its strategic European partnerships as it looks to gain better account penetration.

Konica Minolta's strong pedigree in the MFP market, supported by its bizhub range of devices, positions it well to target a broad customer base with its MPS offerings. Although its service portfolio is scalable for larger organisations, the majority of its current MPS customers are SMBs. Key to Konica Minolta's success will be to drive its OPS consulting services and convince prospective customers that it can offer a flexible managed service tailored to their requirements. Through deployment of the PrintFleet technology, Konica Minolta is well equipped to support the enterprises that operate a heterogeneous print infrastructure. Businesses that have standardised on a Konica Minolta environment should seriously consider CSRC, which enables proactive support and maintenance. Such service capabilities are critical to operating a reliable and highly available print infrastructure and, together with a strong direct service organisation with service staff in most European countries, should be considered a key differentiator for Konica Minolta.

Quocirca believes that Konica Minolta's investment in its OPS brand will pay dividends by broadening its visibility, initially at a country level. At the European level, it faces stiff competition from HP, Ricoh and Xerox, but Konica Minolta now offers a credible alternative for businesses looking to deploy MPS for the first time. Further, with Konica Minolta's strong heritage in the production market, it should also look to widen the scope of its OPS program to encompass CRD/print room outsourcing.

Océ expands MPS proposition in Europe

Following the launch of its Managed Print Services (MPS) offering in The Netherlands, UK and the USA, Océ accelerated the Europe-wide consolidation of its MPS capabilities in the second half of 2010. Océ has a long history in supporting and improving document management processes for its customers. Océ provides document outsourcing services (at customer and dedicated Océ sites) via its strategic business unit Océ Business Services (OBS), which provides mail and print room management, printer fleet management, document process outsourcing and creative services. Its services particularly appeal to large organisations with

complex document processes and in this space it particularly competes with vendors such as Ricoh, Xerox and Pitney Bowes.

In Europe, Océ's strategy is to extend its product and solutions portfolio to a broad range of managed document services, integrated with its customers' IT infrastructure and supporting business processes. Currently, MPS represents around 10% of its total business and is expected to grow to 30% in the next two years. Océ's customer base of 400 customers is split 60% between large enterprises and 40% for mid-size companies. It currently manages approximately 20,000 devices under an MPS contract in Europe.

In March 2010, Canon became the majority shareholder in Océ and the companies are working together on integration planning at both global and regional levels. The initial steps to combine Canon and Océ's product portfolio are now being taken with worldwide scope, providing an integrated offering to all customers. It remains to be seen how both companies will leverage their respective MPS portfolios, but together they are well positioned to be a bigger force in the MPS market.

7.4 Emerging: Toshiba

Toshiba launches pan-European MDS programme

Having lacked a unified European approach to MPS for some time, Toshiba Europe launched its pan-European Managed Document Services (MDS) strategy in July 2010. Toshiba's MDS is a modular service portfolio, available to both its direct and indirect channels, and is scalable from five devices upwards, making the service particularly attractive to SMBs. Today, Toshiba's MPS programme is more developed in the US than in Europe, having an agreement with HP to distribute its products to MPS customers and therefore widening its product portfolio. However, there are no synergies between the US and European programmes and with Toshiba's MDS strategy still being rolled out in Europe, it may be some time before it can replicate the success of Toshiba America Business Solutions (TABS) programme.

During 2010, Toshiba has invested in the development of a central MDS team and has begun rolling out its European programme. Most of its European operating companies have invested in new resources to support MDS, and Toshiba has made a significant investment in operational fulfilment. Regionally, Toshiba has been particularly successful with its MDS offerings amongst large enterprises in the UK, but is also seeing a strong increase in demand in France, Germany and the Nordics. One of its major MPS signings this year was for a major European bank, which covered over 7,000 devices with the customer taking 75% of all MDS modules.

Toshiba has selected multiple European software partners for assessment tools and fleet management in addition to local alliances for other elements of its MDS portfolio, such as business process management and document workflow. In 2011, Quocirca expects Toshiba to further align its regional programmes to offer consistency at a European level. However, it's still early days for Toshiba in terms of MPS penetration in Europe, and it will need to develop strong MPS propositions for its indirect channel, which is its primary go-to-market in many countries. Despite Toshiba currently doing well in the US and Asia Pacific regions, it still struggles in Europe, where it has a limited direct channel. With such a reliance on the indirect channel, Toshiba has the bigger job of convincing the channel to sell its MDS offerings. Overall, with Toshiba experiencing a decrease of 16% in its document systems business globally in 2009 (which covers MFP hardware and services and solutions), it will be relying on MDS to boost its revenue opportunities, which will be particularly challenging in a highly competitive market.

8 Future outlook

Social media, cloud computing, virtualisation, mobile computing and green data centres are at the forefront of today's business agendas because they offer the potential for differentiation and competitive edge. Quocirca believes that MPS has the potential to play a strategic role amongst these imperatives as it helps businesses not only drive cost efficiencies, but also mitigate risk, improve environmental credentials and transform business processes. Quocirca expects the following trends to shape the MPS landscape over the coming year:

Innovation: Quocirca expects businesses will look to derive substantially greater business and transformative value from their MPS agreements, driving innovation, not just operational efficiencies. By developing new ideas, perspectives and flexibility through collaboration, the use of an external MPS provider can increase opportunities for innovation and business transformation. MPS providers will be therefore looking to establish strategic partnerships which expand their opportunities for growth. Savings generated through MPS efforts can move IT funds from reactive fire fighting to investment by driving future innovation and so increase the strategic value from business processes that enable a business to build a competitive advantage.

Although MPS can free in-house resources to innovate, it is ultimately the relationship with the MPS provider that can drive the most innovative solutions. With access to wider resources, geographic coverage and research and technology, development can be vital in helping businesses develop and evolve new solutions. The Xerox and P&G Innovation Council, in collaboration with Xerox, is a good example of this in practice, which was created to explore future work and technology trends and to design solutions that will benefit the P&G business. Quocirca recommends that MPS vendors position their solutions capabilities as central to overall offerings, particularly as key components of MPS become more commoditised. It will be this differentiation that will set the leaders in the market apart from other players.

Consolidation: The MPS market can be viewed as part of the broader technology services market. This market is highly competitive and has witnessed a raft of acquisitions in recent years. These include HP/EDS, Dell/Perot and Xerox/ACS. Quocirca believes that as vendors position MPS as a broader integration with IT outsourcing or BPO, the value of strategic partnerships with IT service providers will become vital. This will be an important route to market when selling MPS to larger enterprises that are planning to or are already outsourcing other elements of their IT infrastructure. In a fragmented market, the need for smaller players in the MPS market to broaden their footprint in larger enterprise deals may create more partnerships and consolidation. For instance, Canon's merger with Océ gives it access to Océ's product, solutions and services expertise and will help improve Canon's competitive position against companies such as Ricoh and Xerox, particularly in the production printing arena. HP's alliance with Canon has also helped it broaden its product portfolio, and Quocirca expects that 2010 will see the expansion of such vendor efforts to deepen their penetration of enterprise MPS deals.

Cloud printing: Cloud printing services address two key areas. Firstly, increased workforce mobility and the popularisation of mobile technology are increasing the need for simple mobile print solutions. Although mobile printing is still in the nascent stages, some vendors are investing in cloud printing capabilities, which are often based on a driverless environment where documents can be sent to a secure server within an organisation's own technology network or through the external cloud. Currently, vendors such as HP, Ricoh and Xerox all offer different solutions for mobile printing, somewhat perpetuating the lack of standardisation of software in the print industry. As solutions evolve and mobile printing becomes more widespread, the capability to analyse print usage from mobile devices will become an added requirement.

The other area for applying cloud printing services is the production of high quality sales and marketing materials. Cloud services such as HubCast, enable customers to upload, print and deliver documents regardless of their location. This can reduce the strain on in-house production resources and improve turnaround times. One example is HP's Virtual Print Center, an online print-on-demand service, which offers users online access to document building, online proofing, printing, finishing and distribution. As vendors look to extend the benefits of MPS beyond the office environment, optimisation of commercial and production printing in this way will offer organisations further cost savings and productivity improvements.

SMB and Midmarket opportunities: MPS is no longer the preserve of larger enterprises. By turning to MPS providers, smaller organisations that don't employ dedicated IT staff can boost their in-house IT effectiveness by enabling key employees to spend less time tackling day-to-day IT issues such as printer administration, support and supplies ordering. However, the SMB market still largely purchases print devices on a transactional basis, and the SMB IT channel is still not fully educated on the benefits of MPS. The availability of packaged offerings such as HP QuickPage will raise awareness of potential recurring service revenues that partners can gain through offering MPS. Quocirca expects major vendors to expand their delivery of services to the channel through a hosted infrastructure to lower the cost of entry for channel partners in these markets.

Document security. The use of secure print solutions within an MPS engagement has yet to reach maturity, and MPS providers may often focus on built-in security features of hardware to reduce the overall costs of a given MPS engagement. However, secure printing solutions can offer tangible cost savings through reduction in waste, and protect document confidentiality and provide traceability. Many businesses continue to rely on printed documents, and the inherent risks of networked multifunction peripherals (MFPs) should not be overlooked. Buyers should carefully evaluate solutions to determine the most appropriate approach to document security. Equally, with MPS providers increasingly offering risk assessments, a robust solution portfolio is necessary to mitigate any highlighted vulnerabilities.

MPS beyond the office environment. While most MPS engagements centre on the office print environment, there are significant efficiencies to be gained by considering the wider enterprise print environment. Xerox and more recently HP are particularly focusing on delivering services across the enterprise to incorporate print room management and commercial printing. For large, diverse and complex organisations, the need for a diligent assessment of enterprise print costs must be the first step, and clearly this will require a comprehensive study. Vendors will continue to be challenged by different stakeholder involvement between IT for the office environment, procurement/facilities for the print room and marketing for external print procurement. Quocirca recommends that large organisations create an MPS best practice group to balance each group's needs.

IT infrastructure integration. More often than not, MPS engagements run independently from other consolidation projects such as desktop consolidation or server virtualisation. However, by exploiting synergies with such projects MPS providers can potentially provide visibility on print costs as part of overall IT cost audits and reports.

9 Conclusion

The MPS market continues to evolve as vendors expand their service offerings beyond the office print environment. Today the business agenda is broader, and MPS must provide a route to business transformation as well as cost efficiency. Businesses must therefore place their transformational goals on the agenda at the beginning of an MPS engagement. Ultimately, those businesses that recognise the business value of MPS and forge strong relationships with experienced MPS partners are in the best position to contain costs, improve efficiencies and support on-going innovation.

Full vendor profiles, along with positioning and competitive graphic representations are available in the full version of the report from Quocirca. If you are interested in purchasing the full report, please contact Val Taylor at val.taylor@quocirca.com

10 Competitive summary table

Key: ● Full support ◐ Partial support ○ No support

	Canon	HP	Konica Minolta	Lexmark	Océ	Ricoh	Toshiba	Xerox
Assessment								
Basic assessment	●	●	●	●	●	●	●	●
Advanced Assessment	●	●	●	●	●	●	●	●
Environmental assessment	●	●	●	●	●	●	●	●
Security assessment	●	●	●	●	●	●	●	●
Implementation								
Deployment planning	●	●	●	●	●	●	●	●
IMAC/D	●	●	●	●	●	●	●	●
Project management	●	●	●	●	●	●	●	●
Support								
Centralised help desk	●	●	●	●	●	●	●	●
On-site support	●	●	●	●	●	●	●	●
Service portal	●	●	◐	●	●	●	●	●
Remote monitoring and supplies management								
Full multivendor remote monitoring	◐	●	●	◐	●	●	●	●
Automated supplies replenishment	●	●	●	●	●	●	●	●
Continuous Improvement								
Change management	●	●	●	●	●	●	●	●
On-going SLA monitoring/review	●	●	●	●	●	●	●	●
CRD/Print Room Services								
CRD/ Print room	●	●	◐	●	●	●	○	●
Document workflow/ business process solutions								
Industry solutions	◐	●	●	●	●	●	○	●
Third party solution certification (Embedded platform) ¹	●	●	●	●	●	●	●	●
Complementary Services								
Business Process Outsourcing (BPO)	◐	●	○	○	●	●	○	●
Customer Communications Management (CCM) ²	○	●	○	○	●	●	○	●
IT Outsourcing	○	●	○	○	○	●	○	●

Notes:

- ¹ Embedded platform solutions relate to those document solutions that support a vendor's own software development platform. Examples include Canon's Multifunctional Embedded Application Platform "MEAP"; Xerox's Extensible Interface Platform "EIP", Ricoh's Embedded Software architecture "ESA" and HP's Open Extensibility Platform "OSP".
- ² Customer communications management (CCM) refers to solutions that provide the personalisation of customer correspondence, through the use of document composition/automation and production tools.

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 HP, Lexmark, Oracle, Microsoft, IBM, Dell, T-Mobile, Vodafone, EMC, Symantec and Xerox, 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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Contact:

Quocirca Ltd
Mountbatten House
Fairacres
Windsor
Berkshire
SL4 4LE
United Kingdom
Tel +44 1753 754 838